

A Retrospective on Chinese Overseas Studies and Agencies: From 1949 to the Present

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Abstract

The study examines the history of the Chinese overseas study market and its corresponding intermediary agencies from 1949 to the present. This market has grown from nonexistence to a robust sector shaped by shifts in national policy and international trends. This research identifies four key developmental stages—pre-reform state-led mobility, early self-funded transitions in the 1990s, rapid expansion in the 2000s and 2010s, and challenges in the 2020s due to the COVID-19 pandemic and geopolitical tensions. By analyzing official documents and contextual policies, the study illustrates the dynamic interaction between state strategy and educational agency evolution. The findings highlight how China's international education is deeply policy-driven and market-responsive, offering insights for future policy design and agency development in the post-pandemic era. By adopting qualitative review of the historical policies and official documents issued to regulate the market, alongside their relevant contexts, the study reflected and analyzed how the market reacts to changes caused by national and international politics, dynamic demands and supplies of educational resources, and social-economical developments in various eras. The study contributes to a comprehensive understanding of current Chinese international education, education policy, and future developments of the intermediary agencies in the post-pandemic era.

Keywords: International education, studying abroad, education policy, China

Introduction

Chinese education in the marketplace has undergone dramatic changes over the past century, mirroring the paradigm shifts in China's dynamic economic and social development. Studying abroad, as an alternative option for Chinese students, also

experienced multiple stages of development. Despite the growing importance of studying abroad as a means of educational pursuit and the increasing size of the market space, little existing research has focused on the historical development of study abroad policy, agenda, and marketing strategies in China. This study adopts a qualitative historical-document analysis methodology. It relies primarily on official policy documents, government publications, and academic literature to explore the evolution of China's study-abroad market and the intermediary agency system. Market reports, such as those by Bonard, also provide empirical context. This approach enables an in-depth understanding of policy trends and institutional transformations across decades.

Objective

This paper adopted a qualitative approach to discuss and evaluate the evolution of the Chinese overseas study market since the establishment of the People's Republic of China (PRC), focusing on intermediary agencies' role and developmental structure. Since the complexity of issues and changes have been interwoven in the history of Chinese overseas study market, the adoption of quantitative review is considered useful to flexibly construct contextual understanding of the dynamics involved in the present undertaking. It begins by examining overseas study opportunities during the early years of the People's Republic of China (1949–1979), followed by exploring how the study abroad market transformed during the Reform and Opening-Up period. More recent periods signaled the growth and maturation of international educational agencies in China, but this paper will recall how COVID-19 has affected the market.

Methodology

This study employs a qualitative historical-document analysis to examine the evolution of China's overseas study market and the corresponding role of intermediary agencies from 1949 to the present. The qualitative document analysis approach was selected because it allows for an in-depth exploration of historical developments, policy shifts, and institutional changes, capturing complex interactions between governmental strategies and market responses across different eras.

The criteria for selecting historical documents included:

1. Official policy documents and government publications that specifically

address overseas study and educational agencies from the Chinese Ministry of Education and other relevant governmental bodies.

2. Academic literature and historical analytic studies published in peer-reviewed journals, which provide contextual understanding and critical interpretations of policy changes and market developments.

3. Empirical market reports, such as those by Bonard, to offer contemporary and quantitative insights into market dynamics, facilitating comparative historical analyses.

The data analysis process involved thematic coding, historical interpretation, and comparative analysis. Initially, collected documents were categorized chronologically to correspond with the identified historical stages outlined in the paper. Subsequently, thematic coding was employed to systematically identify recurring themes and trends within each period. These themes included policy motivations, market responses, shifts in international relations, and the evolving role of intermediary agencies. Historical interpretation was then applied to contextualize these themes within broader socio-political and economic environments. Finally, comparative analysis across different historical stages allowed the identification of continuity and change in policy impacts and market responses.

The primary limitation associated with the qualitative historical-document analysis method is the reliance on existing historical documents, which may reflect institutional biases or incomplete information due to archival accessibility constraints. To address these limitations, multiple sources of documentation were cross-referenced, including governmental records, independent academic analyses, and third-party market reports. Additionally, contemporary data from expert interviews with practitioners in the educational agency industry were incorporated to validate historical findings and interpretations of the current study. Through triangulation, this historical documentation analysis solicited robustness of the findings and improve the overall credibility and replicability of the study.

1. Early Stage: Self-Funded Overseas Study in China from the Reform and Opening-Up Period to the End of the 20th Century

China's policy on studying abroad has changed significantly since the Reform and Opening-Up Period. In the first 30 years after the establishment of the PRC (before 1979), The grand wave of overseas study that began in the late Qing dynasty was

significantly constrained by various factors, including foreign policy and the domestic social system. Regarding destination choices, the Soviet Union and socialist countries in Eastern Europe emerged as the primary options. In contrast, connections with traditional overseas education destinations such as Britain, the United States, and Japan were disrupted. Only a small number of students chose to study in specific continental European countries. The primary mode of dispatch was government-sponsored programs with public grants. Few self-funded students existed during this period. Moreover, these programs primarily focused on cultivating high-caliber academic research talent, such as master's and doctoral candidates, who were selected to meet the country's developmental needs. Undergraduate or younger students rarely had the opportunity to pursue their studies abroad.

Since the Reform and Opening-Up period, overseas education in the West has resumed. Self-financed overseas educational pursuits gradually became possible. Therefore, the late 20th century marked the early stage of self-funded study abroad in China.

During the early years of Reform and Opening-Up, study-abroad policies were government-driven, with Deng Xiaoping's support in 1978. Most students were publicly funded, and their return was the key evaluation criterion. Selected by work units and financially backed by them or the government, these students signed agreements to return after their studies. Opportunities stemmed from direct partnerships between domestic and foreign institutions, leaving no role for intermediaries.

In the early 1980s, the Chinese government also allowed opportunities for self-funded study abroad. The Chinese government had already issued the Regulations on Self-Financed Study Abroad in 1982. Since 1987, the number of self-financed Chinese students abroad has surpassed 100,000 (Chen & Mao, 2020). In the 1980s, due to limited information flow and China's restricted global connections, self-financed students were far less capable than today's students regarding independently completing school applications. The market-driven need for professional intermediary agencies thereby prospered to assist students in connecting with overseas educational institutions and handling application processes. As the number of self-financed students rose, policymakers recognized the need for third-party intermediary agencies. In 1988, the Chinese State Education Commission (name used between 1985 and 1998, the predecessor of today's Ministry of Education) issued the first

document on the establishment of consulting organizations for study abroad, marking the emergence of intermediary agencies, including school-appointed agents, in contemporary China (Wang & Qin, 2018).

China's study-abroad initiatives faced new challenges in the 1990s. Due to the significant gap in living standards, the political upheaval of 1989, the dissolution of the Soviet Union, and the transformation of Eastern Europe, many Chinese students who had traveled to Western capitalist countries chose to remain abroad rather than return. This directly contradicted the prevailing evaluation standard of the time, where "returning to serve the country" was considered the fundamental measure of success for study abroad programs. Dealing with these challenges, the Chinese government chose not to interrupt its overseas study initiatives; instead, new encouragement and supporting policies were key strategies to attract students to return to China naturally. The most well-known expression of this policy is 'support for studying abroad, encouragement to return, and freedom of movement,' introduced in 1993, which remains the Chinese government's guiding principle for study abroad programs.

Due to further development of Chinese society and the encouragement provided by various policies launched by the government, self-financed study abroad continued to grow during the 1990s. The primary regulations governing self-financed study abroad during this period were outlined in the National Education Commission's 1993 notice, "Concerning Issues Related to Self-Funded Study Abroad" (Chinese National Education Commission, 1993). This notice formalized various support measures for self-financed students, including streamlined exit and entry procedures, favorable currency exchange rates, discounted airfares, and a policy shift from 'mandatory return to China' to 'encouraged return to China' (see Articles 1, 7, 8). Nevertheless, the above notice also detailed that self-financed students who belong to the category of publicly-funded students with tertiary education or above needed to fulfill a certain number of years of post-graduation domestic service to be able to study abroad. Otherwise, they must refund the higher education grants (see Article 2, e.g., five years for undergraduate graduates). While self-financed study abroad received increasing support at this stage, certain eligibility restrictions remained. Most self-funded students during this period were still academic researchers pursuing master's and doctoral degrees, in contrast to the

broader inclusion of undergraduate and younger students studying abroad today.

As the number of self-financed students continued to increase, intermediary agencies—officially recognized as early as 1988—began to expand. The development of intermediary agencies during the 1990s can be partially understood through the government's regulatory framework for the sector, namely, the Regulations on the Administration of Intermediary Services for Privately Financed Study Abroad, issued by Decree No. 5 of 1999 by the Ministry of Education, the Ministry of Public Security, and the State Administration for Industry and Commerce of the People's Republic of China, which defined self-financed study abroad intermediary services as "intermediary activities related to self-financed study abroad for Chinese citizens (Chinese Ministry of Education et al., 1999). Intermediary agencies were approved educational service organizations in cooperation with foreign institutions of higher education, educational departments or other educational institutions" (Article 2), which emphasized the requirement of the presence of practitioners who understand the policy for self-financed study abroad. (Article 3(2)). In addition, stable cooperation relations with foreign educational institutions are required (Article 3(3), which can also be found in Article 8: "Intermediary service agencies shall directly cooperate with foreign institutions of higher education and educational institutions to sign relevant cooperation agreements and submit them to the local authorities. The intermediary service agency shall sign the relevant cooperation agreement directly with foreign higher educational institutions and be authorized by the local provincial education administrative department for record.").

A study abroad agency, as defined in the 1999 Regulations, has the professional knowledge to assist people preparing to study abroad, and, most importantly, it needs to have a stable relationship with foreign schools; therefore, it has specific strategies for processing applications and obtaining admissions. The 1999 Regulations were among the earliest regulatory policies for the market of school agents in China, clarifying the rationality and legality of establishing such intermediaries and creating communication channels between overseas schools, domestic agencies, and students in China, which in turn facilitated the initial development of school agents in China. However, through the Provisions, it can be likewise seen that in the late 1990s, Chinese policymakers still had relatively strict regulations on self-financed study abroad

and its intermediary agencies. What may surprise us today is that the Provisions explicitly classify study abroad agencies as a "licensed service activity" that needed to be authorized before establishment and had multi-departmental, high-leverage approval requirements: application for a qualification from the provincial education department and then obtaining approval to the provincial education department, and then "report it to the Ministry of Education and the Ministry of Public Security for qualification recognition" (see Article 4 of the 1999 Regulations). Study abroad intermediary organizations were initially mandated to operate independently within the province where they were registered and approved (see Article 7 of the 1999 Regulations). During the early stage, study abroad agencies were small in scale, faced multifaceted qualification requirements, and primarily served a limited consumer base. The above information can be qualitatively consolidated from historical data from the research organization Bonrad's China School Agent Market 2023 Annual Report (Bonard, 2023). By 2000, mainland China already had 1,110 study-abroad intermediary agencies (agents), indicating that the industry had entered its initial stage of development. However, this number remains minuscule compared to today's figures—an average of 30,000 new study-abroad agencies per year in China since 2019 (Bonard, 2023)—highlighting that the industry was still tightly regulated and niche at the time."

2. Developments in the 2000s

According to data compiled by some researchers, China's study-abroad market showed steady development in the 1990s. From 1989 to 1992 and 1993 to 2000, the average annual number of students studying abroad was approximately 23,000. The annual average increased dramatically from 2000 to 2012, multiplying several times over the previous decade to reach 189,700 students (Miao et al., 2018).

The proportion of self-financed students gradually increased as a primary source of study-abroad funding. By 1992, self-funded students accounted for 60% of all study-abroad participants; by 2000, this figure had exceeded 80%, and by 2010, it surpassed 90%. This trend indicates that by the 2000s, self-funded students had undoubtedly become the dominant group among study-abroad participants. The growing demand for school connections and administrative processes further fueled the expansion of the study-abroad agency market (Liu & Peng, 2019).

Concerning the number of study-abroad agencies, statistics from Bonard indicated a similar developmental trend in the annual establishment of new agencies, with a growth phase beginning in 2000 (Bonard, 2023). That year, 279 new study-abroad agencies were established, and the number increased by approximately 15% each year thereafter. By 2010, 1,119 new agencies were established in one year—a figure equivalent to the total number of agencies established before 2000 (Bonard, 2023).

Thus, China's study-abroad market (including the self-financed study-abroad sector) experienced relatively rapid development starting in the 2000s, mainly benefiting from the process of globalization (Altbach & Knight, 2007). This progress unfolded against the backdrop of China's accession to the World Trade Organization (WTO) in 2001, solidifying its economic reform path toward a socialist market economy. These developments accelerated economic growth, improved living standards, and further integrated China into the world.

As living and income standards rose, more Chinese students and families were able to afford self-financed overseas education. Concurrently, China's integration into the global economy created a significant demand for individuals with global perspectives. This strengthened the competitiveness of Chinese students in the job market, further fueling their desire to study abroad. Meanwhile, Chinese policymakers increased their focus on the self-funded study-abroad population. For example, in 2002, the Ministry of Education revised the 1993 notification on self-funded study abroad, eliminating the requirement for domestic university students to reimburse higher education training costs if they had not completed their service term. This reform granted domestic university students greater freedom to pursue overseas study. Starting in 2004, the China Scholarship Council, which initially provided support for government-sponsored students only, began awarding scholarships to outstanding self-funded students, reflecting heightened governmental support for this group.

As the number of study-abroad candidates increased, the agency market continued to develop throughout the 2000s. It is worth noting that the 1999 Regulations on agency qualifications remained in effect. These regulations required agencies to apply for approvals from provincial education departments and the Ministry of Education and Ministry of Public Security and establish formal agreements with foreign institutions. As

previously mentioned, data from Bonrad indicate that even under such strict regulations, the number of new agencies established in mainland China increased by 15% annually, surpassing 1,000 new agencies per year by 2010.

Some of the most experienced industry professionals joined the agency sector during this time (based on a phone interview with an agent on August 29, 2024). The data demonstrate that, despite the growing prevalence of the Internet gradually reducing information gaps between domestic and international markets, many Chinese self-financed students—despite their increasing language and procedural abilities—still relied heavily on school-representative agencies to facilitate their application for overseas education.

Research conducted by Zhang and Hagedorn further supported this observation. They found that Chinese students studying in various U.S. universities and high school students preparing to study abroad widely utilized agency services. Among the surveyed students already studying in the U.S., more than half had used agency services for their applications, and over two-thirds of the high school students planning to study abroad indicated that they intended to rely on agency services (Zhang & Hagedorn, 2011).

3. Era of rapid development: Expansion in the 2010s

Data and interviews with practitioners in the study-abroad agency market indicate that the 2010s were a rapid development and expansion period for the broader Chinese self-financed study-abroad market. This rapid growth occurred against the backdrop of the Chinese economic boom following the accession to the WTO in the 2000s when China's international influence grew significantly, and the country became deeply engaged in globalization. These developments raised economic capacity, and Chinese society became more open than before, especially with the increasing cultural appeal of foreign countries, leading to a greater ability and willingness among Chinese students to pursue education abroad.

The market expansion in the 2010s was reflected in the significantly increasing number of students studying abroad. Between 2013 and 2017, the annual average number of Chinese students studying abroad reached 510,000, triple the

number compared to the previous decade (Miao et al., 2018). Although English-speaking countries and regions remained the dominant destinations, the age range began to show new characteristics. During the previous two decades, study-abroad students were predominantly graduate students pursuing master's or doctoral degrees. The 2010s saw a growing number of undergraduates and even K-12 students studying abroad. This shift was supported by increased acceptance of studying abroad among Chinese families and their enhanced financial ability.

The rapid rise in students studying abroad was accompanied by accelerated growth in the study-abroad agency sector. In the 2010s, the establishment of new agencies vastly outpaced that of the previous decade. The number of new agencies grew annually by about 50%, surpassing 10,000 for the first time in 2017 and reaching 26,000 by 2019 (Bonard, 2023). This rapid expansion was driven by increasing demand for assistance with study-abroad applications. While more applicants became capable of managing the process independently, a significant portion still preferred to rely on agency services, sustaining strong demand in the study-abroad market.

One of the most critical factors contributing to the expansion of the agencies was the Chinese government's policy adjustments in the 2010s regarding self-financed study abroad and intermediary agency services. The 1999 Regulations initially defined agencies as franchise businesses requiring authorizations by provincial education, the Ministry of Education (MOE), and the Ministry of Public Security approval. As study abroad became more common and self-financed students dominated the market, these regulations significantly constrained the agency market. In response, the government implemented policy reforms in the 2010s to relax and abolish these restrictions.

In 2012, the Chinese State Council's Decision on the Sixth Batch of Canceled and Adjusted Administrative Approval Items delegated the MOE's approval to provincial education departments and allowed cross-province operations and branch establishments. It was followed in 2017 by the State Council's Decision on the Third Batch of Canceled Administrative Licensing Items Designated by the Central Government for Local Implementation, which entirely abolished approval requirements for self-funded study-abroad agencies. These reforms simplified procedures for establishing study-abroad agencies (Wang & Qin, 2018).

The 2012 and 2017 reforms played a pivotal role in the rapid growth of the study-abroad market during the 2010s, enabling agencies to maintain an annual growth rate of 50%. The abolition of approval requirements also lifted restrictions that had limited agency services to high school graduates and above, allowing the development of specialized markets for younger students. This led to the rapid growth of agencies targeting K-12 study-abroad services, particularly those focused on U.S. high schools. Agencies in these segments included both direct-to-consumer services and intermediaries that work with educational consulting firms. Additionally, removing approval requirements allowed global agencies to be registered or controlled by foreign entities that expand their operations in China. These agencies became significant players in the market, particularly among high school student applicants.

For consumers, the deregulation of the industry brought a more vibrant and diverse market with more options. However, it also resulted in more significant variability in agencies' reputations, capabilities, and qualifications. To establish credibility, many agencies and their staff sought certifications through domestic and international associations such as BOSSA/COSSA (the National Association of Study-Aboard Service Agencies) and the British Council.

Overall, the 2010s were marked by the rapid development of China's self-financed study-abroad agencies in the marketplace. The context was that Chinese education was rapidly internationalizing during this period (Wu & Zha, 2018). By 2019, over 26,000 new agencies were established annually, reflecting the industry's scale and potentiality. Changes in the structure of the study-abroad market included the expansion of K-12 services and the increasing role of globally connected agencies, signaling the evolving dynamics of this sector.

4. The 2020s: Multiple challenges and winding developments

The rapid development of China's education agencies and the broader self-financed overseas study market faced challenges in the early 2020s. Key factors include the global COVID-19 pandemic, Sino-American tensions since 2018, and China's 2021 'Double Reduction' policy targeting education and training. These challenges have driven changes in the Chinese education agency industry.

Regarding Sino-American relations, during the first Trump administration, a trade war with China and related sanctions since 2018 disrupted bilateral relations, resulting in difficulties in issuing visas, entry uncertainties, and reported deportations. This raised questions about whether the U.S. remains an ideal or primary destination for studying abroad, which became an issue many students started to reconsider.

The COVID-19 pandemic, starting in early 2020, had the most significant impact on China's overseas study market. It led to travel restrictions, daily life disruptions, health risks, and worsened Sino-American relations. In response, countries, beginning with China, implemented quarantine measures, remote learning, and travel bans, significantly affecting international students reliant on global mobility. China's strict 'Dynamic Zero-COVID' policy led to some of the world's longest-lasting travel restrictions. From March 28, 2020, to January 8, 2023, strict entry testing, quarantine rules, and the 'Five Ones' policy severely limited international flights, making travel difficult for students. Meanwhile, prolonged outbreaks in top study destinations like the U.S. and U.K. (2020–2022) raised health concerns among Chinese students and their families. Lockdowns and remote learning in major destinations between 2020–2021 further diminished the appeal of studying abroad, as China maintained a relatively normal education and living environment under its policies.

The choice of studying abroad destination for Chinese parents and students is based on multiple factors and affected by cultural traditions (Mazzarol & Soutar, 2002; Bodycott, 2009). The uncertainties and risks during the pandemic made the process of decision more complicated, causing a declining demand for self-financed overseas study from 2020 to 2022, particularly in the K-12 segment. Younger students are more vulnerable to pandemic-related risks, and domestic alternatives offer a viable substitute, such as international schools or public high schools' international divisions. Conversely, for undergraduate and postgraduate students, studying abroad remained a more stable choice despite pandemic challenges, as these students are generally more self-sufficient and lack willingness for domestic alternatives.

Evidence on the number of new education agency establishments in China further illustrates the pandemic's impact on the self-financed overseas study market. The number of newly established agencies in 2020 increased by only about 10%

compared to 2019 (from 26,365 in 2019 to 28,927 in 2020) (Bonrad, 2023). There is a stark contrast to the average annual growth rate of 50% during the 2010s, reflecting a significant contraction in market demand. After rebounding to 50% in 2021 (44,799 new agencies) as countries reopened student visas and in-person learning, growth declined in 2022 (41,045 new agencies) due to pandemic uncertainties and shrinking demand, marking the first slowdown in China's education agency business.

After rebounding to 50% in 2021 (44,799 new agencies) as countries reopened student visas and in-person learning, growth declined again in 2022 (41,045 new agencies) due to ongoing pandemic uncertainties and shrinking demand, marking the first slowdown in China's education agency industry (Bonrad, 2023).

Sino-American relations, already tense before the pandemic, worsened further. Early rhetoric from the Trump administration on the virus's origins heightened discrimination risks for Chinese students in the U.S. While Europe and the U.K. reopened student visa applications in the summer of 2020, the U.S. maintained a ban on issuing visas to Chinese students until 2021, discouraging some from choosing the U.S. Additionally, the Trump administration's Proclamation 10043 restricted certain Chinese graduate students, particularly those linked to universities associated with China's "military-civil fusion strategy," from studying in the U.S. (Executive Office of the President, 2020). This significantly impacted agencies specializing in postgraduate programs, shifting demand toward institutions in the U.K., Australia, Canada, Hong Kong, and Singapore.

Domestically, China's "Double Reduction" policy and its crackdown on the education and training market in 2021 also had ripple effects on the market. The policy, aiming at reducing excessive homework and extracurricular training for students in grades 1–9, resulted in sweeping restrictions on private education providers. Given the fact that international education preparation often requires extensive exam and coursework training, cooperated agencies with both education and training services were significantly affected. For instance, Tiandao Education, one of China's top five agencies, declared bankruptcy in 2022 due to its dependence on education training. Larger organizations managed to sustain their operations despite significant challenges; one example is New Oriental, which separated its agency and training divisions. The bankruptcy of Tiandao

Education in 2022 underscored the vulnerability of hybrid education-training models under tightened regulations. It prompted other agencies to reevaluate risk exposure and adopt clearer structural separation between consultancy and instructional services to remain compliant and financially sustainable.

In the 2020s, China's education agency industry and self-funded study market faced turbulence from the pandemic, international tensions, and domestic policies. Despite resilience and adaptation, growth slowed significantly. With China lifting restrictions in 2023, the industry began recovering in a reshaped and uncertain landscape.

5. Summary: Trends, current situation, and outlook for future development

This paper qualitatively discusses and evaluates the evolution of the Chinese overseas study market since the PRC's establishment, focusing on the role and structure of intermediary agencies. The current study broadly categorizes the history of the study-abroad education market into four stages. The main influencing factor in the first stage was the national policy. The reform and opening opened the window for Chinese self-financed overseas pursuits, initially affected by political issues and fluctuations. In the second stage, at the beginning of the 21st century, the study-abroad industry enters the development period; the state also provides scholarships to promote development in response to national development needs. The third stage was in 2010, when China's self-financed study-abroad market expanded rapidly, and the types of products gradually increased, which can be referred to as the golden period of study-abroad service. At the start of the 2020s, the study-abroad industry entered its fourth stage, driven increasingly by international factors amid deepening globalization. The COVID-19 pandemic and unstable Sino-American relations dealt significant blows to the market. As the pandemic ended, China's study-abroad industry restructured its offerings to navigate an uncertain future.

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