

2007—2008 年中国教育 与培训业研究咨询报告

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摘要

2007 年中国教育与培训业持续快速发展，并由此产生了巨大的市场。下表为 2007 年各类教育发展情况。

表：2007 年各类教育发展情况(单位:万人)

指标	2007 年招生	2007 年在校生	2007 年毕业生
研究生	42	120	31
普通高等教育	566	1885	448
普通高中	840	2522	788
初中	1869	5736	1964
普通小学	1736	10564	1870
特殊教育	6	41	--
学前教育	--	2349	--

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政府逐渐开放并大力支持民办教育，为此政府制定了一系列法规来规范和促进民办教育发展。

表:民办教育重要法规一览

年份	法规	备注
1982	《宪法》	明确规定“国家鼓励社会力量举办各种教育事业”
1987	《关于社会力量办学的若干暂行规定》	中国的民办教育走上了有法可依的法制轨道
1997	《社会力量办学条例》	规范民办教育的重要行政法规
2003 年 9 月 1 日	《中华人民共和国民办教育促进法》	标志着中国民办教育的法律体系基本建立

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IT 培训、英语培训、管理培训和少儿教育已成为目前培训教育业的支柱。

2006 年部分 IT 培训机构进行较大程度的调整，使行业整体发展进入一个相对平台期。2007 年，随着商业模式调整到位，资本市场的介入，行业会迎来新一轮发展高峰。

表：2006—2010 年中国 IT 职业培训市场规模与增长预测（亿元）

2006	2007	2008	2009	2010	2011
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市场容量	39.0	48.0	60.3	74.3	89.3	109.5
增长率	25.0%	23.7%	25.7%	23.1%	20.2%	22.6%

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中国英语培训市场的市场总值大约是 150 亿元，全国的英语培训机构总数也已达到了 5 万家之多，预计 2010 年我国英语培训的市场总值将会达到 300 亿元人民币。

远程教育也是培训市场的重要组成部分。运营远程教育的成本有多种分类方法，本报告中分为：制作成本、发送成本和支持成本，三者之间的比例大致是 10: 1。远程教育的制作成本和支持成本较高，而发送成本极低。这是由远程教育一次开发、无限使用和师生分离的特性决定的。

本报告根据国家统计局、教育部、各大教育培训公司等公布和提供的大量资料，对中国教育培训业的发展环境、竞争情况、政策、细分市场、行业重点公司、行业区域发展等方面进行了详细的研究，并针对现状做出了行业发展趋势的分析。

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Abstract	<p>2007 witnessed a continuous and fast development in China's education and training industry, which has formed a huge market. The development of every variety of education in 2007 is as follows:</p> <p style="text-align: center;">Development of Various Kinds of Education in 2007 (unit: 10,000 persons)</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th>Index</th> <th>Enrollment in 2007</th> <th>Students in school in 2007</th> <th>Graduates in 2007</th> </tr> </thead> <tbody> <tr> <td>Postgraduate</td> <td>42</td> <td>120</td> <td>31</td> </tr> <tr> <td>Higher education</td> <td>566</td> <td>1885</td> <td>448</td> </tr> <tr> <td>High school</td> <td>840</td> <td>2522</td> <td>788</td> </tr> <tr> <td>Middle school</td> <td>1869</td> <td>5736</td> <td>1964</td> </tr> <tr> <td>Primary school</td> <td>1736</td> <td>10564</td> <td>1870</td> </tr> <tr> <td>Special education</td> <td>6</td> <td>41</td> <td>--</td> </tr> <tr> <td>Preschool education</td> <td>--</td> <td>2349</td> <td>--</td> </tr> </tbody> </table> <p style="text-align: center;">Source: ResearchInChina</p> <p>The government has gradually opened up the education market and has given substantial support to the non-public funded education. Therefore, the government has launched a series of laws and regulations to regulate and promote its development.</p> <p style="text-align: center;">Major Laws and Regulations on Non-public Funded Education</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th>Year</th> <th>Laws and Regulations</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td>1982</td> <td>"Constitution"</td> <td>It prescribes clearly that the government encourages non-government sectors to develop all kinds of education</td> </tr> <tr> <td>1987</td> <td>Temporary Rules on Running School by Non-governmental Entities</td> <td>China's non-government funded education has rules to abide by</td> </tr> <tr> <td>1997</td> <td>Rules on Running School by Non-governmental Entities</td> <td>It standardizes the major administrative rules on non-government funded education</td> </tr> <tr> <td>Sep.1, 2003</td> <td>"the Non-government-funded Education Promotion Law"</td> <td>It marks the basic establishment of the legal system of</td> </tr> </tbody> </table>			Index	Enrollment in 2007	Students in school in 2007	Graduates in 2007	Postgraduate	42	120	31	Higher education	566	1885	448	High school	840	2522	788	Middle school	1869	5736	1964	Primary school	1736	10564	1870	Special education	6	41	--	Preschool education	--	2349	--	Year	Laws and Regulations	Notes	1982	"Constitution"	It prescribes clearly that the government encourages non-government sectors to develop all kinds of education	1987	Temporary Rules on Running School by Non-governmental Entities	China's non-government funded education has rules to abide by	1997	Rules on Running School by Non-governmental Entities	It standardizes the major administrative rules on non-government funded education	Sep.1, 2003	"the Non-government-funded Education Promotion Law"	It marks the basic establishment of the legal system of
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non-government funded
education

Source: ResearchInChina

IT training, English training, management training and children education have become the pillar for the current training and education industry.

In 2006, some IT training institutions made had a great restructuring, which has helped the whole industry enter into a period of stable development. In 2007, with the adjusted business model put in place and the participation of capital market, the industry would usher in a new round of developmental surge.

**Market Scale and Growth Rate of China IT Training Industry, 2006-2010
(CNY100 million)**

	2006	2007	2008	2009	2010	2011
Market capacity	39.0	48.0	60.3	74.3	89.3%	109.5
Growth rate	25.0%	23.7%	25.7%	23.1%	20.2%	22.6%

Source: ResearchInChina

The market value of China English training market totals around CNY15 billion. There are already more than 50,000 English training institutions in China. It is expected that the market value of China English training industry will reach CNY30 billion in 2010.

Distance education is also a major part of training market. There are many classifications regarding its operating costs. In this report, we divide the costs into three parts: production cost, sending cost and support cost. The ratio of the three costs is about 10:1. Distance education has a high production and support costs, but a low sending cost, which is decided by its features of one-off exploitation, indefinite use and separation between teachers and students.

Based on the substantial data and information released by the National Bureau of Statistics, the Ministry of Education and major education and training companies, the report makes an in-depth study on China's education and training industry regarding development environment, competition condition, policy, segment market, major companies and regional development and also analyzes the development trend based on the current situation of the industry.

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