



AN EDUCATED CHOICE
EXPANDING AUSTRALIA'S EDUCATION,
TRAINING AND RESEARCH ENGAGEMENT
WITH LATIN AMERICA



Report by the Council for International Education
Latin America Working Group

An Educated Choice

Expanding Australia's Education, Training and Research Engagement with Latin America

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Executive Summary

Latin America has become an increasingly important region for Australia's international education sector. Brazil and Colombia are both now in the top ten source countries for international students, with enrolments from the region growing particularly strongly in the Vocational Education and Training (VET) and English Language Intensive Courses for Overseas Students (ELICOS) sectors. This growth in student numbers, coupled with increasing institutional partnerships and research collaboration, has drawn renewed attention to Australia's education, training and research relationships with the diverse countries that make up Latin America.

A key goal of Australia's *National Strategy for International Education 2025* is to embrace new opportunities to grow international education engagement and diversify Australia's education offerings. In line with this objective, Council for International Education Expert Members, in collaboration with the Council for Australia Latin America Relations (COALAR), created a Latin America Working Group in March 2018 to develop a **more strategic, coordinated approach** to building Australian engagement with the region. The first regional-focused working group of this type, it brought together a diverse range of representatives from Australia's education, training, research and business sectors, with Council for International Education Expert Member and English Australia CEO Brett Blacker as chair.

The Australian education, training and research landscapes are large and varied, encompassing multiple stakeholder groups, perspectives and experiences. Moreover, the term 'Latin America' hides the many and significant differences between the various countries which make up the region. Recognising this complexity, the Working Group took the following approach to developing this report, which is mirrored in its structure:

- **Defining Latin America:** For the purposes of this report, an assessment of current Australian international education data trends across Latin America identified ten countries for the initial survey. When an assessment of economic and education contexts and identification of priority countries by stakeholders was made, this was narrowed down to six countries (Argentina, Brazil, Chile, Colombia, Mexico and Peru).
- **'Stocktaking' current Australian engagement:** consultation with all of the major stakeholders (providers, governments, businesses, researchers, education agents) to identify the nature of current engagement. Noting the overwhelming current focus on onshore delivery and student recruitment, a survey was also undertaken with over 4,200 Latin American students and 31 agents in the region to better understand perceptions of Australia and motivations for study.
- Identifying stakeholder views on the key **opportunities and barriers** for engagement with Latin America, and where action would have the most impact for enhancing Australia's position in the region.
- Developing a broad set of overarching **recommendations** to address the key issues to emerge from the Working Group's consultations and research: a lack of market intelligence, the need to expand and diversify current engagement, fragmented marketing and promotion of Australia, and the need to commit to action by supporting coordinated, ongoing and sustainable engagement.
- Identifying **the way forward** for stakeholders based on the recommendations: suggested next steps for stakeholders to build on the findings of this report, in line with their roles and strategic frameworks.

Well over 200 Australian stakeholders from the education, training, research, industry and government sectors took part in the Working Group's consultations, demonstrating a widespread interest in the potential for greater engagement with Latin America. The recommendations in the report, outlined in the following matrix and explored more fully in Chapter 5, are intended to ensure the momentum that has been generated through this process is not lost and that all stakeholders can work together to position Australia as a committed and beneficial partner for Latin America as the region continues to grow in global importance for education, training and research.

RECOMMENDATIONS MATRIX

Building Knowledge

- 1.1 Provide more market intelligence from Australian Government posts in the Latin American region to the Australian international education sector.
- 1.2 Embed a focus on Latin America into sector-led networks, communication channels and events.
- 1.3 Identify and develop information resources on Latin American centres of research excellence to support opportunities for research collaboration.
- 1.4 Connect with Latin American embassies and diaspora communities to promote greater understanding of the region in Australia.

Expanding Engagement

- 2.1 Increase transparency and information on Australian visa settings to support student mobility.
- 2.2 Engage at a government-to-government level on systems development and alignment, including participation in multilateral fora engaging Latin America and development of regional occupational standards.
- 2.3 Invest in a Latin American research fund to support joint projects with partner research agencies.
- 2.4 Fund government, sector and industry scholarships to promote greater two-way mobility between Australia and Latin America.
- 2.5 Engage in consortia to respond to large-scale opportunities and overcome barriers to investment.
- 2.6 Develop and implement education and training products appropriate for offshore delivery in Latin America, and establish articulation arrangements with local providers.
- 2.7 Pilot a new approach to market development grants (either through EMDG or other grant program) to support Australian providers enter Latin American markets.

Promoting Australia

- 3.1 Advance a national and consistent narrative focused on the quality of Australian education, training and research.
- 3.2 Promote and leverage Australia's reputation in English language teaching.
- 3.3 Develop alumni engagement strategies that encompass all sectors and build the profile of Australia in Latin America.
- 3.4 Strengthen relationships with quality education agents.
- 3.5 Develop a greater digital presence in Spanish and Portuguese to promote Australia's education, training and research institutions.
- 3.6 Provide sector funding for Education Ambassador(s) to develop institutional relationships and promote Australian education, training and research capabilities.
- 3.7 Undertake outreach activities to onshore students from Latin America to provide tailored, relevant information on pathways options.

Committing to Action

- 4.1 Demonstrate commitment to expanding engagement with Latin America at the highest leadership levels.
- 4.2 Enhance coordination with industry across Australia's education, training and research engagement.
- 4.3 Invest in additional resourcing for Australian Government representation in the region to underpin collective action on building knowledge, expanding engagement and promotion of Australia.
- 4.4 Create a Reference Group to serve as a focal point for coordination across stakeholder groups and evaluation of progress made in implementing recommendations.

1

Overview of Latin America



**What is Latin America
and What Are the Region's Education Priorities?**

Regional Definition

In many Latin American countries, there is a renewed focus on the internationalisation of education, training and research, including through greater student and academic mobility, increased international collaboration and English language training for teachers. At the same time, there is growing interest in engaging with Australia in light of evolving relationships with traditional partners. Given this environment, Australia has an ideal opportunity to review its activity and assess ways in which it might better establish itself as a study destination and education partner for the region.

For the purposes of this report, the term Latin America is used, rather than South America, to ensure that Mexico is included. A broad definition of Latin America includes anywhere south of the USA, but does not include the Caribbean, as this does not traditionally fall within the Latin American region due to language and other historical factors.

This report initially examines the top ten Latin American countries for onshore students in Australia, namely Brazil,

Colombia, Chile, Mexico, Venezuela, Peru, Argentina, Ecuador, Paraguay and Uruguay and then, through surveys and consultations, narrows down the scope to six priority countries (Brazil, Colombia, Mexico, Chile, Peru and Argentina) with a particular focus on the first four. This does not preclude other countries from being a focus for individual Australian stakeholders or diminish the significance of other partnerships, but is a reflection of the most commonly identified priorities across the Australian education, training and research sectors as a whole.

It is worth noting that Brazil, Mexico and Argentina constitute the largest three economies within Latin America. Chile, Colombia, Mexico and Peru make up the Pacific Alliance trade bloc while Brazil and Argentina are the anchor economies of the Mercosur economic and political bloc. Moreover, Brazil, Colombia, Chile and Mexico represent the four largest Latin American student source countries for Australia (44,063 students in 2017, representing over 91 per cent of Latin American students in Australia).



Domestic Contexts

Latin America is an important region for Australia due to the recent substantial growth in student numbers and the potential for future partnerships. However, Latin America is not a monolithic region and it is important to consider the domestic political and economic contexts of each country, as well as education, training and research priorities, when exploring both opportunities for future engagement and potential barriers to collaboration.

There are some common priorities among the countries listed below, including an increasing focus on the provision of quality education and the importance of an internationalised education system (Latin America saw 84 per cent growth from 2013 to 2017 in the numbers of students studying in Australia alone, albeit from a low base) as well as increased support for international research collaboration.

English language teaching has also become a national priority among many Latin American countries in the context of their internationalisation agendas, a reflection of the importance of English proficiency for global partnerships and mobility.

While it is common for many Latin Americans to pursue a quality education abroad, many countries in Latin America are seeking to improve their own domestic education systems in terms of quality and access. This is seen as a way to address skills gaps and mismatches with the labour market, alleviate poverty, grow economies and enhance innovation.

These ambitions are nevertheless subject to political and economic realities. Hence, the priorities and role of national governments in the region should be considered alongside other levels of government when developing strategies for engagement, as well as those of institutions, business and sectoral organisations.

BRAZIL

As the largest economy in Latin America and the eighth largest in the world in terms of GDP, Brazil represents the largest Latin American source country for students coming to Australia to study.

Brazil has experienced political and economic challenges in recent years, following the impeachment of President Dilma Rousseff in August 2016 and economic crisis from 2014 to 2017.

Brazil's large budget deficit led to stringent austerity measures, which included a cap on public education spending at 2015 levels in real terms for the next 20 years.

At the time of writing, the elections scheduled for October 2018 have brought a level of uncertainty about future directions. However, inflation remains in check and Brazil's mining, energy and agricultural industries remain crucial to the economy.

On the education front, Brazilian students and institutions have shown increasing interest in more flexible education models. In fact, distance learning is now a rapidly increasing mode of education in the postgraduate market in Brazil, with Brazilian students and parents adopting the benefits of technology faster than their counterparts in other countries.

Internationalisation of education is a major priority in Brazil, as evidenced by the launch of the CAPES-PrInt program in 2018. The program seeks to replace the previous Science Without Borders scholarship program by encouraging Brazilian higher education providers to seek international partnerships which support postgraduate and academic mobility. Australia is a priority partnership country under this program.

Increasing international research collaboration remains a focus in Brazil, with state-based organisations such as FAPESP (São Paulo Research Foundation) seeking joint research funds and activities with overseas federal and state organisations. Brazil continues to consider higher education financing reforms, as well as improvements to its vocational education and basic education systems. Like many countries in Latin America, English language teaching is an area of increased focus.

Brazil's outlook for the short to medium term remains unsure as the economy continues to recover and elections loom; however, its importance as a regional power and education partner will continue.

COLOMBIA

Colombia is the second largest Latin American source country for students in Australia, with an 83 per cent increase in student numbers between 2013 and 2017. As the fourth largest economy in Latin America, Colombia has experienced an economic boom, with a sharp decrease in poverty levels and a matched increase in industrial activity.

The historic peace accord signed with the Fuerzas Armadas Revolucionarias de Colombia (FARC) guerrilla group in 2016, for which former president Juan Manuel Santos won the Nobel Peace Prize, was an important step in bringing to an end decades of civil unrest between the government and rebels controlling parts of the countryside. However, there is uncertainty around the future of the peace agreement following the June 2018 election of President Iván Duque, whose government is seeking to renegotiate the deal with the FARC rebels.

Colombia has shown its commitment to a more open economic policy by joining the OECD. While Colombia's economy is still commodity-based, with petroleum representing 45 per cent of its exports, it has shown immense growth in electronics and information technology, as well as shipbuilding (it has the largest ship manufacturing industry outside Asia).

In terms of education, investment has grown swiftly, from 20.8 billion pesos (AU\$9.6 billion) to 37.4 billion pesos (AU\$17.2 billion) between 2010 and 2018,¹ with the previous Santos government recognising the need to invest in Colombian education at all levels in order to drive the country's economy. Priorities under the previous government included transforming Colombia into the 'most educated' country in Latin America by 2025, retraining ex-combatants for successful reintegration into society and ensuring equal access to quality education for disadvantaged groups. Greater linkages between education, training and research and industry improved international mobility for students, academics and researchers (supported by COLFUTURO, ICETEX and COLCIENCIAS) and the creation of a bilingual population which speaks both Spanish and English were also key priorities, as was higher education financing reform.

While the policy direction of the new Duque administration is still under development, many of the key priorities for Colombian education, training and research are expected to remain.

CHILE

Chilean student numbers in Australia have grown swiftly in recent years, with a 106 per cent increase from 2013 to 2017. This has made Chile the third largest source country for Latin American student enrolments in Australia. Historically, Chile

has been a leading regional economy in terms of stability and prosperity and in 2010, it became the first Latin American member of the OECD.

Chile is one of Latin America's largest economies, with the highest GDP at purchasing power parity per capita in the region. Ranked 33rd in global competitiveness, 47th in innovation and 34th in terms of its digital agenda,² Chile is recognised as a sound economic policy leader in the region. Chile's largest industrial and economic sectors are mining, business services, manufacturing and wholesale and retail trade, with mining representing 52 per cent of exports in recent years.³

The Chilean Government is seen to actively promote education, employment and growth. Traditionally, of the priority countries, Chile has had the largest national budget in percentage terms for its education portfolio, with 20 per cent of the budget allocated to the Ministry of Education in 2015.⁴

Notwithstanding, the Chilean Government recognises the need for investment in its research and development budget, which is currently approximately 0.36 per cent of GDP.⁵ A recent move to create a new Ministry of Science, Technology and Innovation to complement the Ministry of Education demonstrates a recommitment to prioritising research and science.

Following the election of former president Sebastián Piñera in December 2017, Chile has increasingly focused on improving its vocational education and training system, including through a recent bill aiming to provide free technical education for up to 70 per cent of vulnerable students in Chile and the creation of 15 new public VET colleges across the country. Moreover, there is a strong focus within the country on improving English language skills, which are seen as a direct contributor to economic growth.

Other priorities include higher education financing reform, following the unprecedented step towards free higher education taken by the previous Bachelet government, student and researcher mobility through programs such as BECAS CHILE, and improving Chile's science and innovation outputs.

In 2019, Chile will host the Asia-Pacific Economic Cooperation (APEC) forum, which will bring an even greater focus to Chile's international education engagement.

¹ Source: Ministry of Finance and Public Credit, 2018

² Source: World Economic Forum, 2017; Global Innovation Index, 2018

³ Source: OECD and United Nations, 2018

⁴ Source: The World Bank, 2018

⁵ Source: OECD, 2016

Domestic Contexts

MEXICO

Mexico is the second largest economy in Latin America after Brazil, with massive service and industrial sectors. It is the fourth largest source country of students from Latin America to Australia, with the number of Mexican students in Australia increasing by 64 per cent from 2013 to 2017.

Economic growth has averaged 2.3 per cent annually, with Mexico now known as an industrial powerhouse with high-tech industrial production in the automobile and electronics sectors driving the economy – Mexico is, for example, the largest manufacturer of LCD and LED televisions in the world, having overtaken South Korea and China in 2009. Mexico is also the sixth largest oil producer in the world.

Nevertheless, with corruption challenges (Mexico ranks 135 of 180 countries in the Corruption Perceptions Index 2017),⁶ security issues in its larger cities, budget cuts and renegotiations of the North America Free Trade Agreement (NAFTA), Mexico is under pressure to improve productivity and education levels. While the Peña administration sought to implement reforms in a range of sectors, including education, newly elected President Andrés Manuel López Obrador has pledged to address corruption and take a different approach to education.

At the time of this report, Mexico remains in transition as the new president will not be sworn in until December 2018. However, López Obrador's education priorities appear to be predominantly focused on primary and secondary education, including improving access and removing recent requirements on school teachers. He is also seeking to improve the autonomy of private universities. English language teaching will likely remain a key issue, as well as improvements to VET.

International research collaboration is an important priority area for Mexico and a potential opportunity for further engagement with Australia.

PERU

As the sixth largest economy in the region, Peru has consistently maintained itself as the sixth largest Latin American source country for international students in Australia. However, its growth from 2013 to 2017 did not match that of the other

countries listed above, with an increase of 10 per cent during that period.

The Peruvian economy is driven by its traditional industries, such as mining, fishing, construction and agribusiness, and has experienced almost 15 years of uninterrupted economic growth, maintaining a positive outlook under the new presidency of former vice president Martin Vizcarra, who was sworn in on 23 March 2018. While Peru's economy is vulnerable to shocks from international commodity prices, leading to slower GDP growth between 2014 and 2017, growth levels are expected to recover in the longer term.⁷

The Peruvian Government recognises the need to improve education at all levels, from primary to postgraduate, to address skills shortages in the country. In 2015, the government enacted a new law to create SUNEDU, an authority tasked with monitoring the quality of higher education. Further requirements were put in place that all active professors at Peruvian universities hold at least a master's degree in their area of expertise.

Peru has also sought to encourage research and innovation through its tax incentives law which offers direct financial benefits to companies that wish to invest in applied research within the country.

In February 2018, Peru signed a bilateral free trade agreement with Australia. This agreement included a side letter on education in which Peru agreed to encourage the recognition of Australian higher education qualifications. Peru continues to welcome Australian investment and provide a business-friendly environment to Australian entrepreneurs.

ARGENTINA

Argentina is Latin America's third largest economy, after Brazil and Mexico, with rich natural resources and a highly literate population. Its economy has a diverse industrial base that includes agriculture (in which it is a world leader), mining and energy, manufacturing and services.

At the general elections in 2015, the centrist Mauricio Macri narrowly won the presidency on a pro-business, pro-reform agenda which promised to address the perceived

⁶ Source: Transparency International, 2018

⁷ Source: World Bank, 2018

mismanagement of the Argentinian economy by the previous Kirchner administration.

According to the World Bank, the country saw economic growth of 2.9 per cent in 2017 after a 1.8 per cent contraction in 2016. The economy is expected to expand again⁸ and Argentina has committed to reducing its budget deficit in line with International Monetary Fund (IMF) requirements; however, the country has experienced increasing inflation (40.3 per cent in September 2018).⁹

Argentina's education system faces a number of challenges, including its low number of university graduates as a percentage of the population in spite of higher enrolment ratios compared to Brazil and Chile. Poor results in comparative tests such as the OECD PISA and regional inequities in education quality and access are other concerns.¹⁰

Regardless, Argentina has become a destination for international students from within the region, particularly at the undergraduate level, with international student enrolments doubling over the past decade. While Argentina has not historically prioritised internationalisation, as reflected by its low outbound student mobility ratio compared to its Latin American neighbours, this may change in the longer term, with the inaugural International Higher Education Fair Argentina (FIESA) hosted in Mendoza in February 2018.

The Argentine Government has recognised the need to develop its VET system by introducing training with strong links to industry and qualification frameworks similar to the system in Australia. Other priorities include improving basic education to ensure Argentina's population is equipped with skills for the future, and investment in science and research.

Argentina sends a small number of students to Australia, with 769 students in 2017, but this number is growing rapidly, having increased by 229 per cent since 2013.

⁸ Source: The World Bank, 2018

⁹ Source: Trading Economics, 2018

¹⁰ Source: WES, 2018

2

Current Levels of Engagement



Understanding Australia's Current Education, Training and
Research Engagement with Latin America

In developing an assessment of how Australia can enhance its education, training and research relationships with Latin America, it is important to first develop a snapshot of Australia's current levels of engagement. The Working Group's 'stocktake' of current engagement, which took into account international education data as well as inputs from all major stakeholder groups, has identified growth not only in onshore enrolments but also a broad range of engagement activities. It also points to the complexities of the landscape and the potential for better aligned efforts. More detailed data collected through the process can be found in the report's annex.

Trends in Onshore Enrolments in Australia

Student numbers from the region have grown dramatically in recent years, increasing from 26,155 in 2013 to 48,241 in 2017, representing 84 per cent growth.

Brazil has historically been the largest source country of students to Australia from Latin America. The number of Brazilian students increased by 91 per cent from 2013 (12,691) to 2017 (24,246). This is the third highest growth rate in the six Latin American countries in focus for this report and the highest in terms of absolute numbers of Latin American students studying in Australia.

Colombia was the second largest source country, sending 14,112 students to Australia in 2017, a number that grew by 83 per cent from 7,727 in 2013. Colombia and Brazil alone accounted for 80 per cent of all Latin American students studying in Australia in 2017. Mexico, Peru, Chile and Argentina represented nearly 16 per cent of all Latin American students.

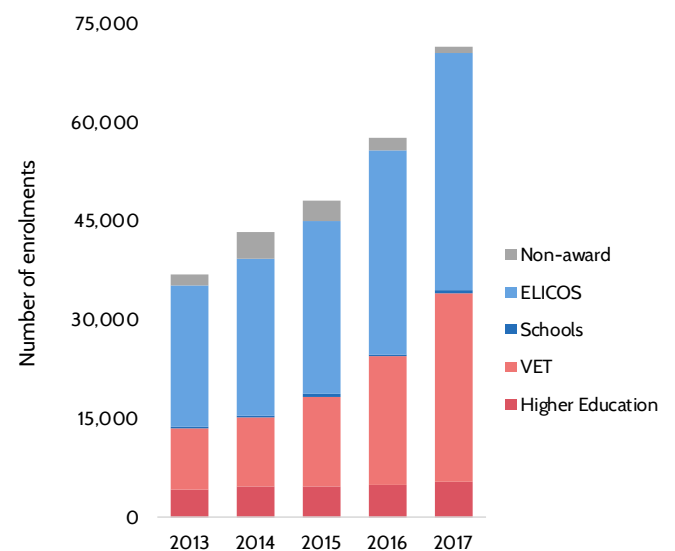
In terms of enrolments¹¹, the region saw overall growth of 94 per cent between 2013 and 2017. ELICOS enrolments experienced strong growth of 70 per cent from 2013 to 2017. It is the largest sector, growing from 21,290 in 2013 to 36,106 enrolments in 2017 and accounting for 51 per cent of all enrolments from Latin America over the period.

After ELICOS, VET is the largest sector for Latin American enrolments, making up 40 per cent in 2017. VET enrolments surged by 211 per cent, increasing from 9,158 in 2013 to 28,506 in 2017. Over the same period, higher education enrolment growth from Latin America was modest at 29 per cent, growing from 4,304 enrolments in 2013 to 5,542 in 2017.

The schools and non-award sectors showed declines during the 2013 to 2017 period of 20 per cent and 40 per cent

respectively. Enrolments in the schools sector were down to 355 in 2017 from a high of 444 in 2013 (peaking at 453 in 2015). Similarly, the non-award sector declined from 1,645 enrolments in 2013 to 981 in 2017 (peaking in 2014 at 4,195 enrolments).

LATIN AMERICAN ENROLMENTS BY SECTOR



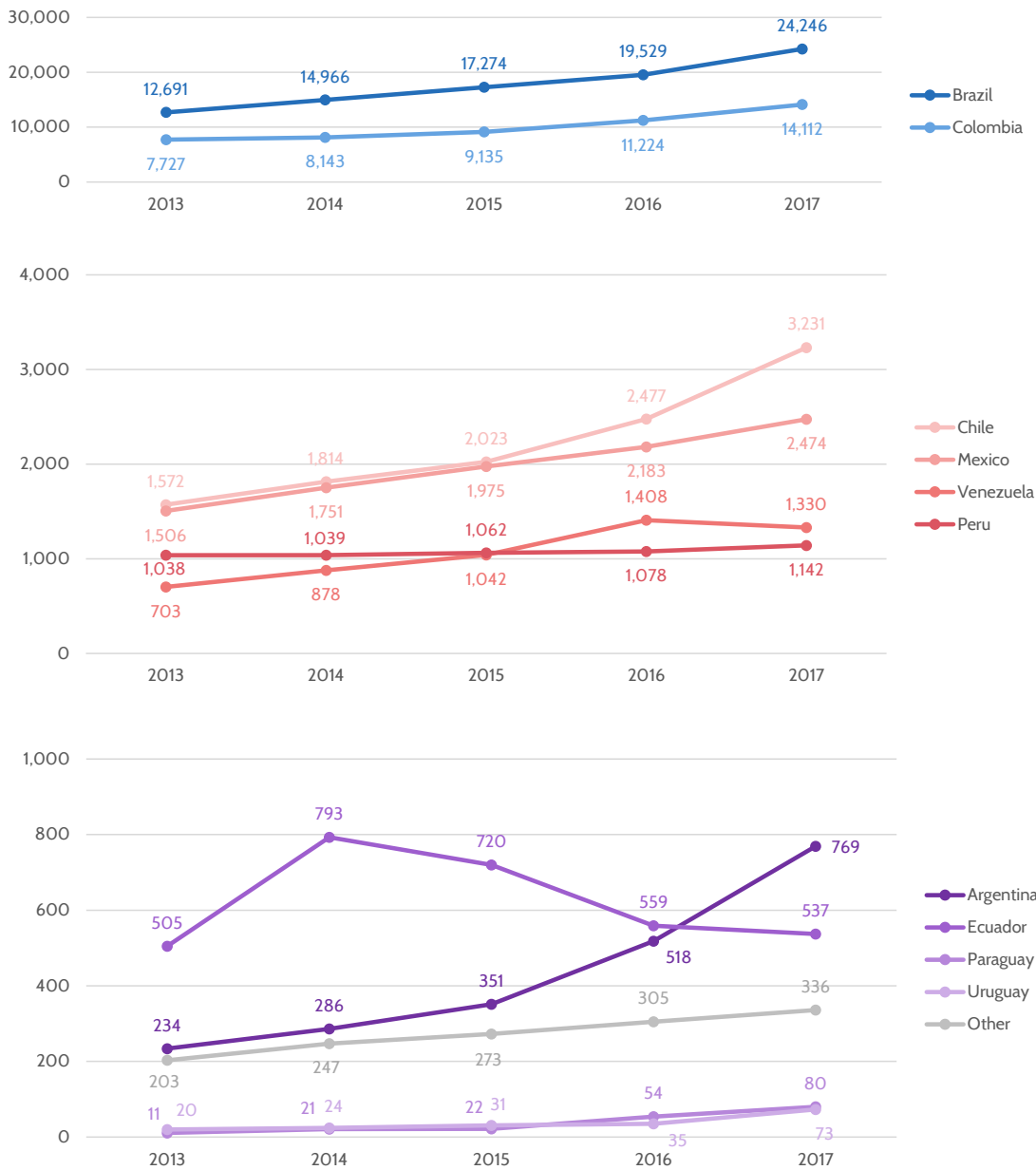
Source: Department of Education and Training, 2018

In the six Latin American countries in focus for this report, overall enrolments stood at 68,154 in 2017. Of these, Brazil accounted for 36,496, or 54 per cent.

¹¹ International student enrolment data generally does not represent the number of overseas students in Australia or the number of student visas issued in different countries. Instead, enrolment data counts actual course enrolments. One student can have multiple enrolments in the same reference period, with both enrolments counted.

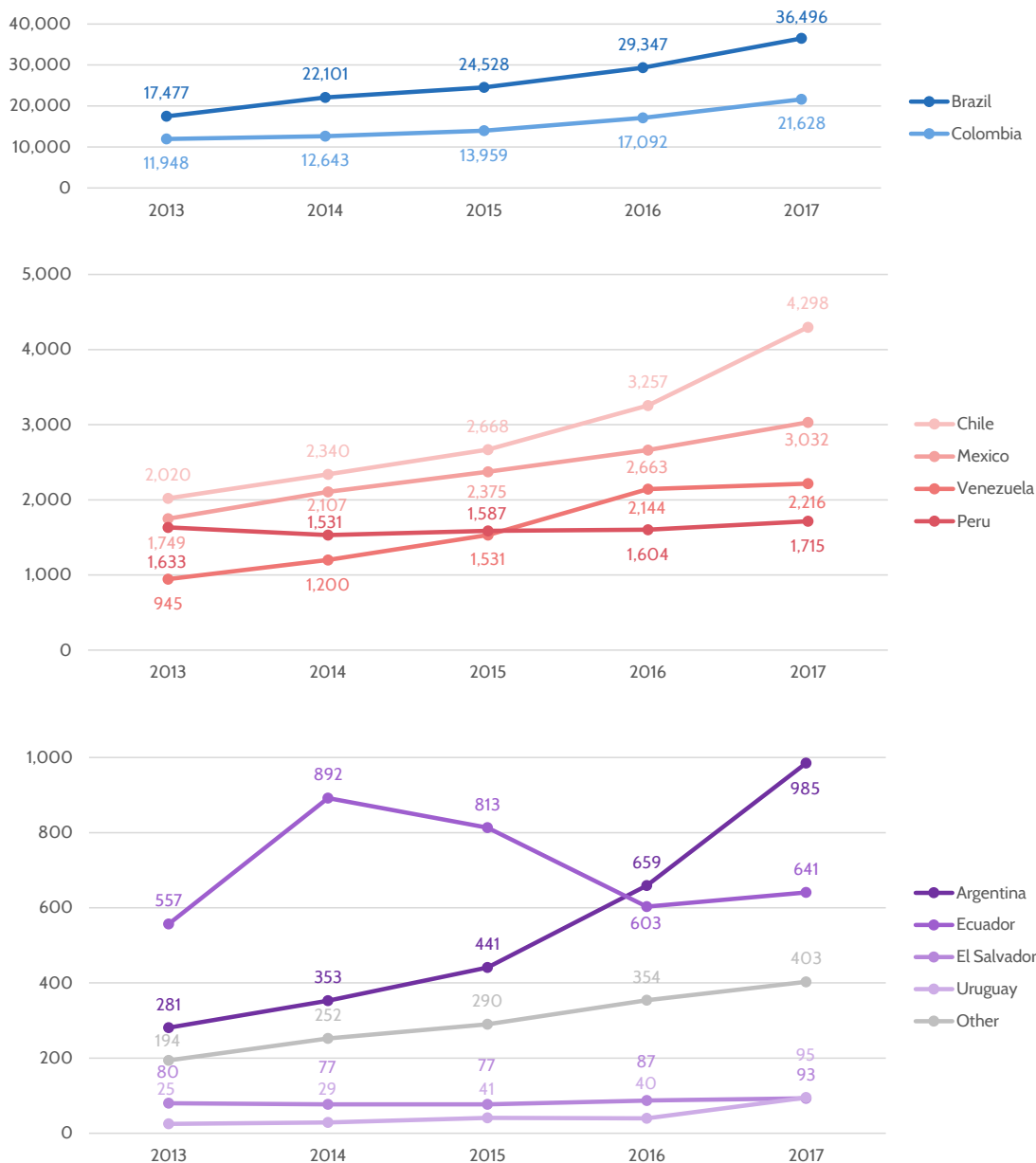
Trends in Onshore Enrolments in Australia

NUMBER OF LATIN AMERICAN STUDENTS IN AUSTRALIA



Source: Department of Education and Training, 2018

NUMBER OF LATIN AMERICAN ENROLMENTS IN AUSTRALIA



Source: Department of Education and Training, 2018

Trends in Onshore Enrolments in Australia

LATIN AMERICAN ENROLMENTS BY SECTOR 2017 - PRIORITY COUNTRIES

SECTOR	ARGENTINA	BRAZIL	CHILE	COLOMBIA	MEXICO	PERU	TOTAL
Higher Education	158	1,639	489	1,543	657	352	4,838
VET	423	16,164	1,570	7,077	1,097	484	26,815
Schools	6	238	45	15	40	1	345
ELICOS	364	18,205	2,104	12,901	781	861	35,216
Non-award	34	250	90	92	457	17	940
Grand Total	985	36,496	4,298	21,628	3,032	1,715	68,154

LATIN AMERICAN COMMENCEMENTS BY SECTOR 2017 - PRIORITY COUNTRIES

SECTOR	ARGENTINA	BRAZIL	CHILE	COLOMBIA	MEXICO	PERU	TOTAL
Higher Education	68	775	203	662	284	147	2,139
VET	296	10,831	1,062	4,830	734	302	18,055
Schools	6	226	45	8	35	0	320
ELICOS	298	14,052	1,683	9,965	596	667	27,261
Non-award	25	104	80	81	426	15	731
Grand Total	693	25,988	3,073	15,546	2,075	1,131	48,506

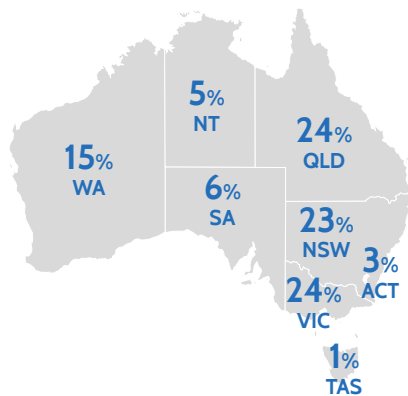
Source: Department of Education and Training, 2018

Sectoral Engagement with Latin America

The Working Group surveyed education and training providers to gain a better understanding of current engagement activities and priorities and to supplement publicly available data gathered by the Department of Education and Training.

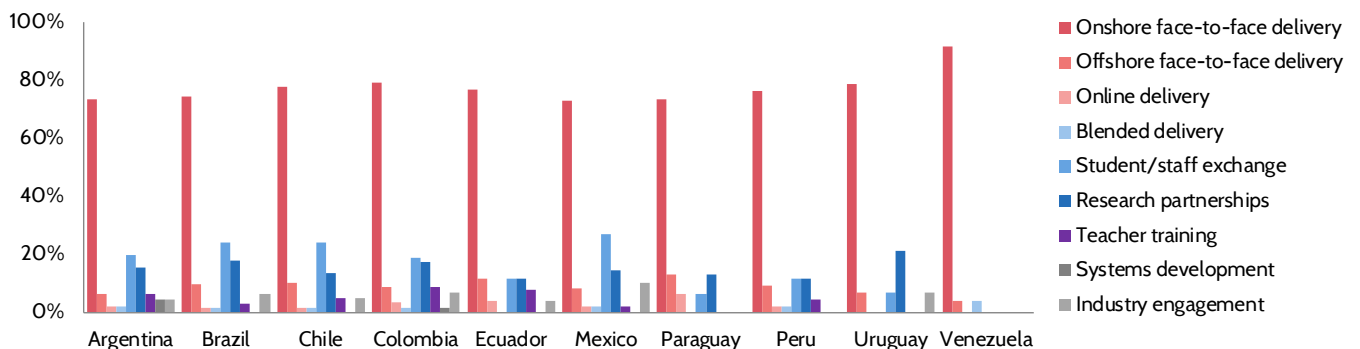
The survey received 80 complete responses, with roughly half from private sector institutions and half from public sector institutions. Responses from Queensland, New South Wales and Victoria made up the majority of responses (70 per cent), reflecting the high proportion of Latin American enrolments in those states (92 per cent).

RESPONDENTS BY STATE OR TERRITORY



n=80; percentages do not add up to 100% due to rounding

CURRENT NATURE OF INSTITUTIONS' ENGAGEMENT WITH LATIN AMERICA



n=66

PERCENTAGE OF RESPONDENTS CURRENTLY ENGAGED WITH LATIN AMERICA



n=80

The majority (84 per cent) of respondents indicated that they were currently engaged with Latin America. When asked to detail the manner of engagement in their responses, respondents indicated that the primary form of engagement in Latin America was via student recruitment, be it online or through student education fairs.

The use of education agents was prevalent, and repeatedly mentioned, as most respondents had no offshore presence in Latin America aside from external agents. A few research-focused universities indicated that they had a number of research agreements with universities in Latin America and worked closely with government agencies in Brazil, Chile, Argentina, Colombia and Mexico to source funding.

More than one third of respondents (36 per cent) stated that their institution's engagement in Latin America was through a consortium approach alongside other institutions (for example, as a part of the Group of Eight, Australian Technology Network, TAFE Directors Australia and so on).

Sectoral Engagement with Latin America

More than half of the engaged respondents (58 per cent) indicated that they were engaged in ELICOS. ELICOS was followed in popularity by higher education at 44 per cent, VET at 33 per cent, research at 16 per cent and schools at 15 per cent.

The overwhelming majority (96 per cent) of engaged respondents stated that they were engaged with Brazil. This was followed by Chile at 90 per cent of respondents, Colombia at 88 per cent, Mexico at 79 per cent, Argentina at 70 per cent and Peru at 67 per cent.

While the trends for engagement were similar across sectors, Colombia stood out as the most popular country for ELICOS and VET sector engagement. Higher education engagement was most popular in Brazil and Mexico, and Colombia and Brazil stood out in terms of research engagement.

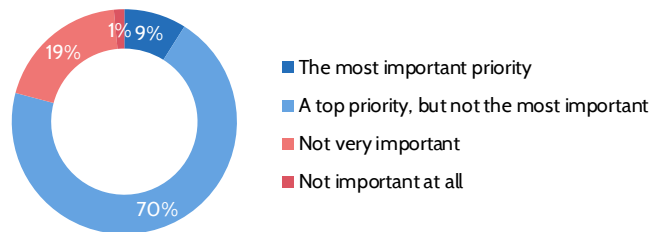
Of the 16 per cent of survey respondents that were not currently engaged with Latin America, the majority (69 per cent) came from either the higher education or schools sectors. Institutions not engaged with Latin America cited a lack of demand, lack of resources and low capacity of students to pay for education abroad as the three main reasons they were not active in the region.

A large proportion of respondents were not aware of how Australia's competitors were engaging in Latin America (approximately one fifth of respondents). The USA was most commonly cited (by 25 per cent of respondents) as Australia's main competition due to its greater brand awareness in Latin American markets and its competitive price point to Australia. This was followed closely by Canada.

STRATEGIC PRIORITIES FOR ENGAGEMENT IN THE REGION

While the survey did not directly ask respondents whether their institution had a Latin American strategy, they were asked how important the region was in their institution's overall strategy. The overwhelming majority (79 per cent) either ranked Latin America as the most important priority or a top priority among other regions.

WHERE DOES THE LATIN AMERICAN REGION RANK IN YOUR INSTITUTION'S OVERALL STRATEGY?



n=67; percentages do not add up to 100% due to rounding

One metric for the importance of the region is the number of formal institution-to-institution agreements between Latin American and Australian universities, which stood at 413 in 2016. A large majority of these agreements (93 per cent or 386 agreements) were with the six priority countries identified in this report. Brazil led the way with 26.6 per cent of the total (110 agreements). Mexico had the second highest number of institution-to-institution agreements at 24.9 per cent, or 103 agreements.

Research Engagement with Latin America

The Working Group developed a research engagement survey to supplement the sectoral engagement survey, which only received a small number of responses from research representatives. This was distributed through the Australian Academy of Science and Universities Australia and received 49 complete responses.

PERCENTAGE OF RESPONDENTS CURRENTLY ENGAGED WITH LATIN AMERICA

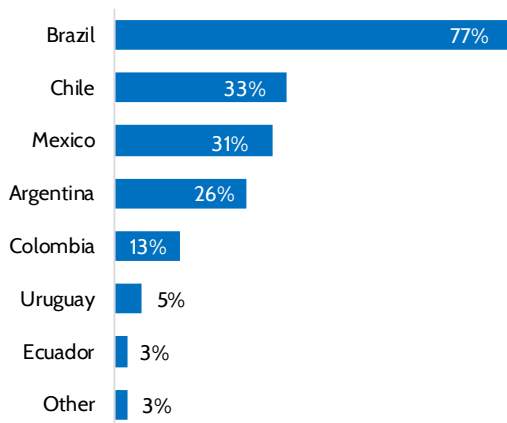


n=49

A large percentage of respondents to the research survey () stated that they currently have some form of research engagement with Latin America. Of these respondents, 41 per cent indicated that their institution had a strategy in place to expand current research engagement in Latin America, while 38 per cent were unsure of their institution's research engagement strategy.

The most popular countries for research engagement were Brazil at 77 per cent, Chile at 33 per cent and Mexico at 31 per cent.

PERCENTAGE OF RESPONDENTS CURRENTLY ENGAGED IN THE FOLLOWING COUNTRIES

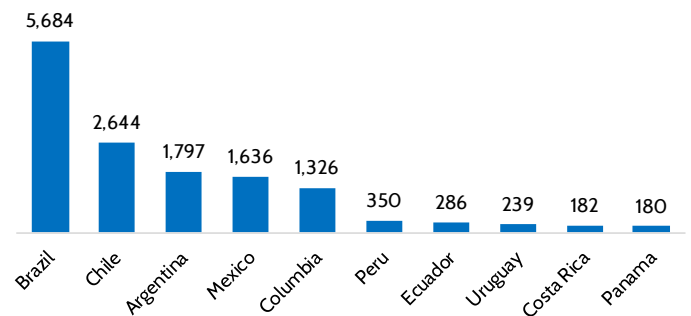


n=39

This engagement usually took the form of joint publications through research collaboration, and research exchange programs. A small number of institutional respondents stated that they received Latin American research funding through various government agencies in Latin America, including FAPESP in Brazil.

Results from the research survey largely reflect Australia's current research collaboration with the Latin American region, as measured by the number of co-authored publications between 2015 to 2018. Recognising that numbers in the SciVal database are regularly adjusted, as of October 2018 Australia's largest research collaborator in Latin America was Brazil, with 5,684 co-authored publications, followed by Chile (2,644), Argentina (1,797), Mexico (1,636) and Colombia (1,326).

CO-AUTHORED PUBLICATIONS OF AUSTRALIAN AND LATIN AMERICAN RESEARCHERS (2015-2018)



Source: SciVal, October 2018

Many respondents were unsure of competitor activity within the region. However, over a quarter of respondents indicated that the USA was active in the region, with a perceived comprehensive strategy, strong links to the region and funding to support collaborative research.

Spain was highlighted as a proactive research partner with Latin America by roughly a fifth of respondents, both bilaterally and through the European Union (EU). One respondent pointed out that Spain actively fostered collaboration between its own and Latin American researchers through the provision of public and private grants, something which Australia has failed to achieve through matching arrangements with Latin American agencies such as CAPES, CNPq and FAPESP. Germany was also singled out as an active competitor by 15 per cent of respondents, who highlighted the work of the Humboldt Foundation.

Research Engagement with Latin America

CASE STUDY

Engaging with Latin America in the research field is the **Commonwealth Scientific and Industrial Research Organisation (CSIRO)**. Its offshore representation in Chile was initially funded through the Chilean Government's International Centre of Excellence (ICE) program, specifically in Mining and Mineral Processing. It has been operational for seven years and is actively conducting research projects in mining and mineral processing, aquaculture and fisheries, water management, social licence to operate and emergency management.

Return on investment was delivered through 23 projects across various sectors, such as mining, aquaculture and water management. It was built through 30 key alliances with multinational companies and government agencies. Another benefit of the collaborative partnership with Chile is that CSIRO can potentially access significant funding schemes that are otherwise not accessible (e.g. EU, Green Climate Fund, Inter-American Development Bank, etc).

Chile provides a world-leading opportunity in certain industries and this has allowed CSIRO to develop projects, partnerships and capability which have a clear benefit return to Australia, including in mining, water scarcity and land use, and Pacific Ocean management.

The CSIRO Chile team located in Chile consists of local researchers and students as well as staff to support research operations. CSIRO Chile has also built close collaborations with local university partners to build and access their capability, providing mutual benefit to Chile and Australia. Chilean projects in 2016-2018 involved around 80 Australian-based CSIRO researchers, which has allowed CSIRO to maintain and potentially increase a breadth of scientific capability that national investment alone could not.

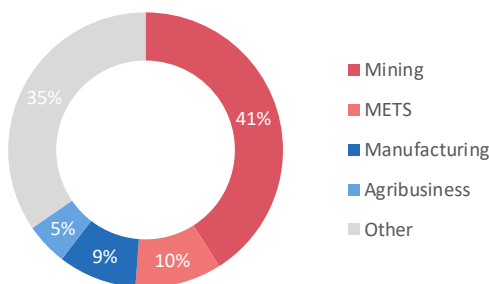
Key learning points:

- Institutions need to provide at least some operational funding that is not tied to specific projects, particularly when establishing an offshore presence.
- Building local relationships with individuals, companies and organisations is vital to operating successfully in Latin America, as is employing local experienced staff to build and maintain these critical relationships.
- Parent organisations, even if not initially known locally, need to be able to offer an international reputation so that local trust and credibility can be built.
- Commitment to sustaining the local presence needs to be maintained.

Industry Engagement with Latin America

Department of Foreign Affairs and Trade (DFAT) data show that there are over 420 Australian companies in Latin America, including 43 ASX200 companies. Forty-one per cent are in the mining sector, 10 per cent are in METS (mining equipment, technology and services), nine per cent are in manufacturing and five per cent are in agribusiness.

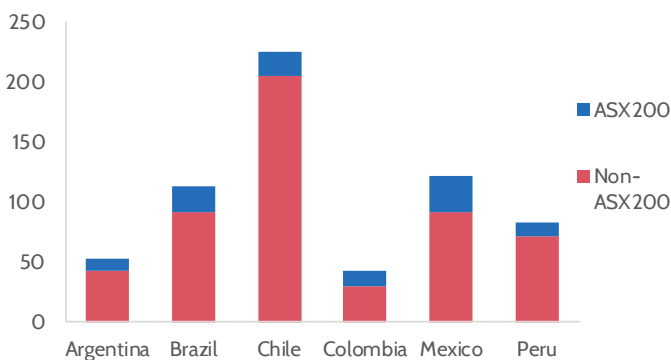
AUSTRALIAN COMPANIES OPERATING IN LATIN AMERICA BY SECTOR - 2017



Source: DFAT, 2018

DFAT's data show that Chile has the most Australian companies operating in the region, followed by Mexico and Brazil.

AUSTRALIAN COMPANIES OPERATING IN LATIN AMERICA BY COUNTRY - 2017 (SELECTED COUNTRIES)



Source: DFAT, 2018

Recognising the importance of bringing an industry perspective into the Working Group process, a survey was attempted through various channels to develop an understanding of the skills needs, research requirements and opportunities for greater collaboration between industry and the education, training and research sectors. However, only a small number (12) of responses was received. The responses were from Western Australia, Queensland, Victoria and New South Wales.

Seven of the responses were from mining companies engaged in Latin America, with the remainder in education and training, manufacturing or other services. Eight respondents were from medium to large businesses. The overwhelming majority (11) identified Latin America as a top priority for their company, if not the most important. Current engagement was concentrated mainly in Colombia, Chile and Argentina. Five of the respondents indicated their company had engagement with local education and training providers. One company stated that it provided full university scholarships to local communities.

Unmet skills needs were identified in most countries but were particularly apparent in Colombia, Chile and Argentina. Deficiencies in technical mining skills were noted in Argentina, Chile, Colombia, Mexico and Peru. Low English language skills were identified as an issue across the board. Respondents saw opportunities for education and training providers to engage with industry, particularly in in-house training, online delivery and internships.

Many respondents were unsure of barriers to engagement between education and training providers and industry in the region, but the two largest barriers identified were a lack of information and a lack of resources. While these responses are useful, the small sample size means that it is difficult to extrapolate from them.

Following the survey, further engagement was undertaken with the Australia-Latin America Business Council to identify how relationships could be enhanced between Australian industry and the international education sector. Annual events for Australia-Latin America Business Council (ALABC) members such as the ALABC Networking Day and new initiatives such as 'Meet the Ambassador' series with Latin American embassies could provide opportunities for providers and research organisations interested in connecting more closely with Australian businesses operating in Latin America. However, further specific and coordinated action is needed to better understand the exact nature of opportunities for aligning Australia's education, training and research efforts with industry.

Federal and State and Territory Government Engagement

One common theme that arose from consultations and surveys was that the sector had little awareness of government activities in Latin America and there was a need to improve coordination between government and the sector. To this end, the Department of Education and Training, as Secretariat for the Working Group, surveyed relevant federal and state and territory government agencies on their education engagement with the region.

Information from this whole-of-government stocktake showed a wide and diverse range of priorities and numerous current activities by multiple government agencies in the region, but also common areas of focus. This information was used to inform recommendations. The results are outlined in the section below.

REPRESENTATION

The Australian Government has embassies in six Latin American countries, with the most recent opening in Bogotá,

Colombia in 2017. In addition to DFAT officials, other federal agencies represented in the region include Austrade, the Department of Education and Training, the Department of Home Affairs and CSIRO. The Department of Agriculture and Water Resources has announced it will post Counsellors to Latin America in 2019, supporting increased engagement in a key sector for Australia's international education, training and research cooperation.

At a state and territory level, Victorian Government Trade and Investment and Trade and Investment Queensland have offices in Santiago, Chile.

Priority countries for engagement identified by all stakeholders through the Working Group's stocktake process have reflected the Australian Government's diplomatic footprint in the region.



ROLE OF GOVERNMENT

To ensure a holistic picture of Australia's current engagement with Latin America, the Working Group has sought to develop an understanding of government engagement with the region at federal and state and territory levels. This understanding will inform recommendations as to where efforts can be most effectively aligned across government and the sector and where increased investment will have the most impact in enabling Australian education providers to more effectively respond to opportunities in the region. In a resource-constrained environment, the Working Group recognises the need for government to prioritise and target investment where it will generate the most effective returns for Australia.

Government-to-government engagement on education, training and research has a number of purposes and benefits, from fostering people-to-people links to removing structural impediments to cooperation and mobility. In a region where countries have had less historical engagement with Australia's education, training and research sectors and partnerships are less established, government engagement is particularly important to build mutual understanding of respective systems, increase two-way mobility and identify opportunities for Australian stakeholders to engage with new partners.

As a federal country, Australia has multiple levels of government that play a role in international education, training and research engagement. There are also multiple agencies at these levels, representing not only education or research agencies but also those with diplomatic and trade and investment responsibilities. This makes coordination and communication critical in determining shared strategic priorities and bringing together key stakeholders from across Australia. The two major relevant fora for Australia's national education, training and research engagement with Latin America are:

- COALAR, which plays an important leadership role in enhancing Australia's economic, political and social relations with Latin America. Its membership consists of Australian experts from a diverse range of fields with experience in the region, as well as ex-officio representatives from DFAT, Austrade and the Department of Education and Training. Education is a priority area for COALAR, reflected in the number of COALAR grants awarded to projects with a focus on education and research.
- The Council for International Education brings together six Ministers from the key portfolios for international education (Education; Foreign Affairs; Trade; Skills and

Vocational Education; Immigration; and Industry, Science and Innovation) along with Expert Members from the sector, to oversee the implementation of the *National Strategy for International Education 2025* and ensure the sector continues to play a key role in driving Australia's future economic growth, global engagement and innovation.

FOCUS OF AUSTRALIAN GOVERNMENT EDUCATION, TRAINING AND RESEARCH ENGAGEMENT

Across federal and state and territory government agencies, the Working Group's stocktake process identified a broad range of activity already underway with Latin America. As specific initiatives will evolve over time, the stocktake focused on identifying the broad types of activity being pursued by government actors in line with their roles and responsibilities. This summary is not an exhaustive list, with examples intended to illustrate the main types of current government engagement in the region.

Formal agreements

Government-to-government agreements provide an architecture for bilateral education, training and research cooperation and can help target efforts by both government and the sector. There is a broad range of agreements between Australian Government agencies and federal and provincial governments across Latin America. Federally, the Department of Education and Training has formal memoranda of understanding (MoUs) with seven Latin American countries (Argentina, Brazil, Chile, Colombia, Mexico, Paraguay and Peru). The Department of Industry, Innovation and Science has two treaty-level agreements with Latin American countries, Mexico and Brazil (not yet in force), while CSIRO has agreements with Peru and Brazil including an MoU with the Brazilian Agricultural Research Corporation (Embrapa). At the state and territory level, there have been a number of broader bilateral agreements signed with both national and state government counterparts in Latin America that incorporate education, training and research elements.

Government-to-government engagement on education, training and research policies and systems

Federal and state and territory agencies undertake a broad range of bilateral engagement activities with key Latin American education, training and research government agencies. This engagement includes incoming and outgoing delegations; dialogue with official counterparts; policy projects, workshops and events; and longer-term cooperation on systems

Federal and State and Territory Government Engagement

development. Nationally, the Department of Education and Training is focused on government-to-government engagement with partners in the Latin American region on education and training policy and systems, working closely with DFAT and Austrade, but this type of engagement is also undertaken by state and territory education and training agencies.

Given the nature of multilateral engagement, federal government agencies engage in relevant multilateral fora where education, training and research related cooperation is undertaken with Latin American partners on behalf of Australia. Key multilateral fora with Australian and Latin American representation and engagement on education, training and research issues include APEC (Mexico, Peru and Chile); G20 (Argentina, Brazil and Mexico); OECD (Chile, Mexico and soon Colombia) and UNESCO (all countries).

Market intelligence and trade facilitation

Federal and state and territory agencies engage not only with government counterparts, but also institutions, peak bodies, research organisations and business across the Latin American region. This engagement provides a broad range of important market intelligence for Australian stakeholders to assess where there are meaningful opportunities aligned with their expertise and products. In regions where there are challenges around high entry costs and uncertainty about returns on investment, government engagement is of particular importance in facilitating greater two-way trade and mobility.

The Australian Government's *Foreign Policy White Paper* has a strong focus on the trade opportunities emerging from Latin America. DFAT is currently leading Australia's negotiations on a free trade agreement between Australia and the Pacific Alliance bloc (Mexico, Colombia, Peru and Chile). This follows a bilateral free trade agreement concluded with Peru at the end of 2017, as well as the conclusion in early 2018 of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership that involves Mexico, Peru and Chile. The *Foreign Policy White Paper* also notes the Australian Government's desire to deepen Australia's trade and investment dialogue with the Mercosur countries (Argentina, Brazil, Paraguay and Uruguay). Austrade and DFAT provide national leadership on trade facilitation, while individual states and territories also pursue trade opportunities through a range of mechanisms including trade missions.

Visa information and processing

The Department of Home Affairs is responsible for Australia's visa and migration settings, which are critical enabling factors

for Australia's international education sector. Home Affairs staff in the Latin American region are responsible for processing most Australian student visa applications from nationals of Latin American countries, although some are processed in other locations.

In order to improve processing times, Home Affairs staff in Latin America also engage in regular and targeted engagement with student visa applicants and the education/visa/travel agents that represent them. Home Affairs staff are also increasingly using videos, email newsletters, Facebook posts and webinars to engage with clients and stakeholders on visa processes and correct misinformation about student visa requirements found on social media. For example, a 22-minute video on student visa requirements (subtitled in Portuguese) is available on the website of the Australian in Brasilia and has also been played at education fairs and expos in Brazil and Argentina. Home Affairs works with relevant federal and state and territory agencies on disseminating visa information, including with Austrade through the Study in Australia website.

Scholarships and mobility

The most significant national scholarship and mobility program for tertiary education and research engagement with Latin America is the Australian Government's *Endeavour Leadership Program* (ELP). The ELP provides opportunities for established and emerging leaders to undertake a global mobility experience within their study, research or professional field. Funding supports high performing individuals, tertiary providers and their students from around the globe to undertake study, professional development or research, and increase their expertise in their field. Latin America is not an eligible region for the Australian Government's New Colombo Plan, which has an Indo-Pacific focus. States and territories also support a range of scholarship and mobility initiatives, at the schools level as well as the tertiary level, that are either open to Latin American nationals or targeted at specific partners.

Alumni engagement

While institutions have their own alumni strategies, government plays an important role in supporting alumni engagement to strengthen people-to-people connections and deepen mutual understanding with partner countries. The Australian Government's Global Alumni Network is led by DFAT, with support from Austrade and the Department of Education and Training in the region. States and territories also undertake alumni engagement activity. The Victorian Government, for example, has launched Victorian Alumni Networks in Chile and Colombia.

Support for research collaboration

Government-to-government engagement on research collaboration with partners in Latin America is currently focused on policy exchanges, specific cooperation projects and raising awareness of Australia's funding support mechanisms for international research collaboration. Numerous Australian Government agencies, at both the federal and state and territory level, engage with key research agencies in the region, such as COLCIENCIAS in Colombia and CNPq and FAPESP in Brazil, as government involvement is important in establishing ongoing relationships with these partners.

Australian Government agencies do not currently have any joint bilateral research funds with Latin America. Instead, collaboration is supported through largescale federal initiatives for which Latin American partners are eligible including:

- The Australian Research Council's *National Competitive Grants Program* (NCGP), which has multiple opportunities available for research engagement between Australia and Latin America at both individual researcher and organisational level.
- The Department of Industry, Innovation and Science's *Global Innovation Strategy* (GIS), which offers a range of opportunities for collaboration.
- The Department of Education and Training's ELP, which has opportunities for Australian and Latin American applicants to undertake postgraduate study or short-term research overseas.

Marketing and promotion

Austrade is the national lead agency on Australia's marketing and promotion of Australian international education. At a state and territory level, there is a significant range of marketing and promotional activities taking place both digitally and through physical events such as education fairs in the region.

Education agent engagement

Education agents are an important stakeholder group in Australia's international education sector. In 2017, education providers reported that education agents were involved in almost three quarters of all international enrolments. In Brazil and Colombia, the two largest Latin American source countries, the percentage was 89.2 per cent and 82.6 per cent respectively. The Department of Education and Training's *Education Agents Data Project* aims to improve transparency of agent performance by giving all CRICOS registered education

providers access to reports about the education agents they engage to recruit overseas students. This will help providers better understand the enrolment outcomes of education agents with whom they work.

Austrade undertakes education agent training across the Latin American region, supported by the Department of Home Affairs. This is undertaken both in-person and online; for example, a webinar for education agents in Brazil was held in March 2018 (attended by more than 125 agents) and a similar webinar targeting agents in Chile, Colombia, Peru, Ecuador and Venezuela was held in June 2018 with over 200 registered attendees. States and territories also engage with education agents, including through providing training, accreditation and initiatives such as familiarisation tours.

RECOGNISING CURRENT STRATEGIC FRAMEWORKS

There are a number of government strategies relevant to Australia's education, training and research engagement with Latin America, which need to be recognised in making recommendations for this report. At a federal level, strategies that provide overarching guidance for activity include the *National Strategy for International Education 2025*, Austrade's *Australian International Education 2025 Roadmap* (AIE2025), DFAT's *Australian Global Alumni Engagement Strategy* and the Department of Industry, Innovation and Science's *Global Innovation Strategy*.

States and territories also have their own overarching strategies for international education, or are in the process of developing these strategies, which inform their approach to education, training and research engagement with Latin American partners. Trade and Investment Queensland's *International Education and Training Strategy to Advance Queensland 2016-2026* identifies Latin America broadly as a priority location for the state's offshore network, while its *2018-19 Global Partnership Plan* identifies priority emerging markets in the region as Brazil, Colombia, Chile and Peru.

In May 2018, Victoria launched its *Latin America Trade and Investment Strategy*. The strategy has a strong international education focus, identifying Brazil, Colombia and Mexico as priority countries for engagement and aiming to double student numbers from Latin America over the next ten years. Taking into account existing frameworks and noting that not all government agencies have strategies for Latin America in place, this report's recommendations are designed to be able to inform implementation of existing strategies as well as support development of new ones.

3

Perceptions of Australia



Understanding the Views
of Latin American Students and Agents

Student Perspectives

While the surveys of Australian stakeholders provide an important insight into sector and government perspectives on Latin America, the Working Group recognised the importance of gathering information from Latin American stakeholders to provide a more complete picture.

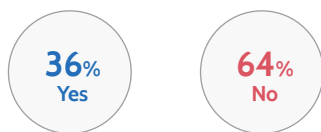
Given the importance of onshore student enrolments in Australia's current engagement with Latin America, the Working Group sought perspectives from Latin American students themselves to better understand Australia's current positioning in the region. Students' insights were gathered through an online survey of 4,240 students from the Latin American region, conducted in cooperation with StudentMarketing and BMI.

The survey helped to identify Australia's unique selling points, the challenges faced by students when seeking to engage with Australia and views on competitor countries as study destinations.

Crucially, the results show quality of education is an important factor for students when considering Australia as a study destination, but the quality of education in Australia is perceived to be lower than that in the USA, the UK and Germany. This perspective is important as it challenges commonly held assumptions within the sector that Australia should focus on promoting its lifestyle and beaches when targeting Latin American students.

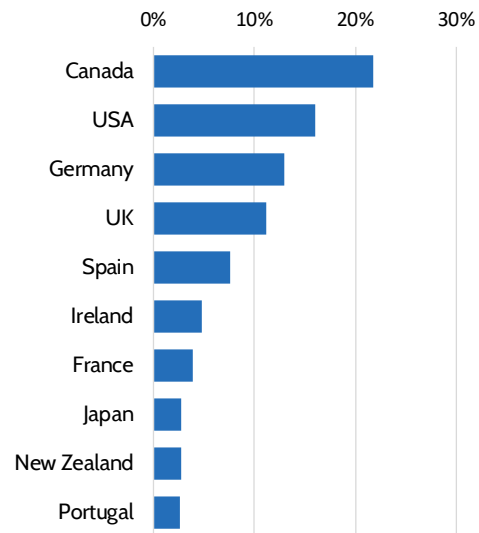
The results also indicate more could be done to promote pathway options into other courses upon completion and alumni could be better engaged in promoting Australia as an education destination.

WOULD AUSTRALIA BE YOUR PRIMARY DESTINATION OF CHOICE?



n=4,240

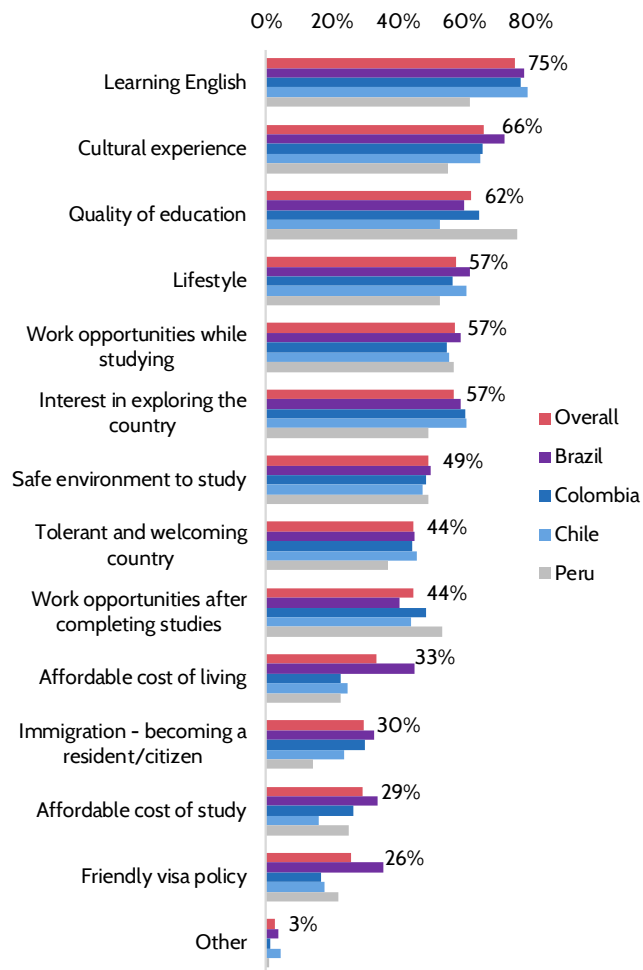
PREFERRED DESTINATION TO STUDY (IF AUSTRALIA NOT THE PRIMARY CHOICE)



n=2,630

The majority of students surveyed (64 per cent) did not consider Australia their primary destination of choice. Those students instead indicated that their preferred destinations were Canada (22 per cent), chosen primarily by Brazilian, Mexican and Colombian students; the USA (16 per cent), which remained popular with Brazilian and Peruvian students; Germany (13 per cent), predominantly with students from Colombia, Chile and Peru; and the UK (11 per cent), which was chosen by mainly Mexican and Chilean prospective students.

**STUDENTS' REASONS TO PREFER AUSTRALIA
- OVERALL AND BY NATIONALITY**

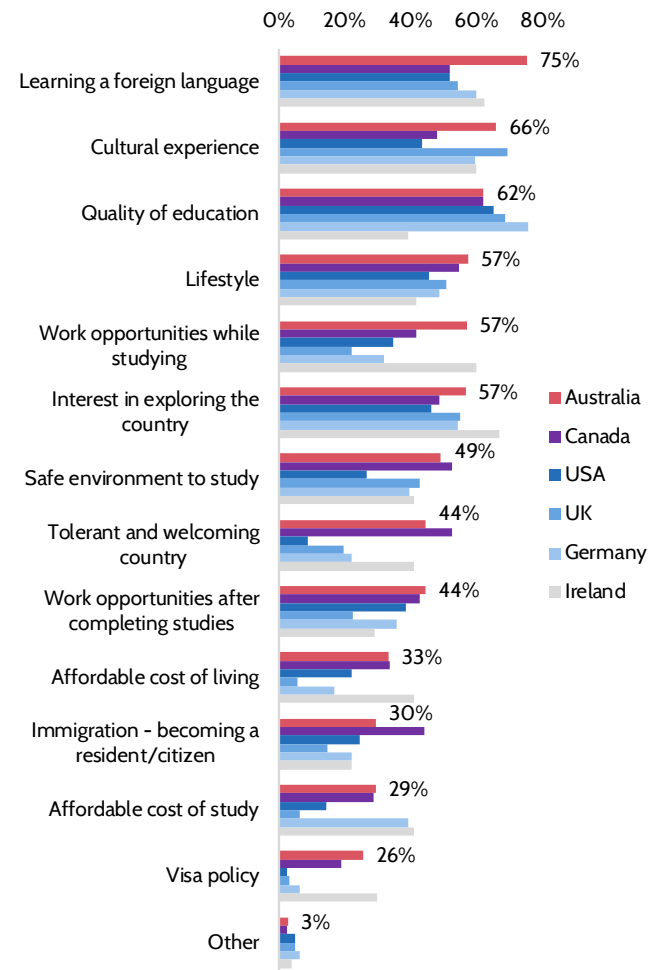


n=1,427; multiple answers possible

Where Australia was identified as the preferred study destination, the most common reason given was that it provides an opportunity to learn English, as well as other factors including the cultural experience, quality of education and lifestyle.

Overall, work opportunities after completing studies ranked as the ninth most selected reason to prefer a destination but this was selected more often for Australia than for other selected destinations.

STUDENTS' REASONING REGARDING THEIR PREFERRED STUDY DESTINATION



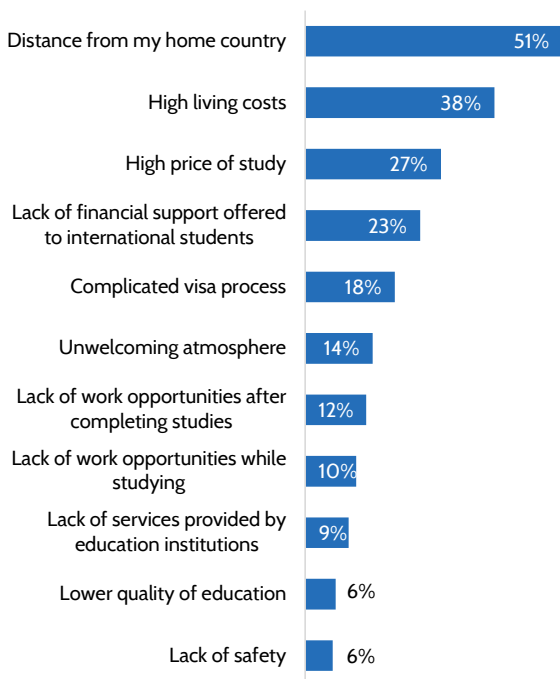
n=4,050; multiple answers possible

Canada was students' primary choice for safety, a tolerant and welcoming attitude and immigration opportunities. The UK was chosen for its cultural experience, Germany for its quality of education and affordable cost of study, and Ireland for its work opportunities while studying, an interest in exploring the country, the affordable cost of living and study and its attractive visa policy. While the USA scores high - though never being the top choice - for a number of answers, it was not perceived as a tolerant and welcoming country. Compared to other competitor countries, students saw the USA as having an unwelcoming visa policy and an unsafe environment in which to study.

Two thirds of prospective respondents who did not select Australia as their primary destination would opt for Australia as their second choice. As a result, 78 per cent of all respondents stated they would consider Australia their primary or secondary destination choice.

The main deterrent for students considering Australia was its distance from their home country (51 per cent). High living costs and the high cost of study in Australia were also major disincentives for Latin American students.

STUDENTS' REASONS TO NOT SELECT AUSTRALIA AS A STUDY DESTINATION



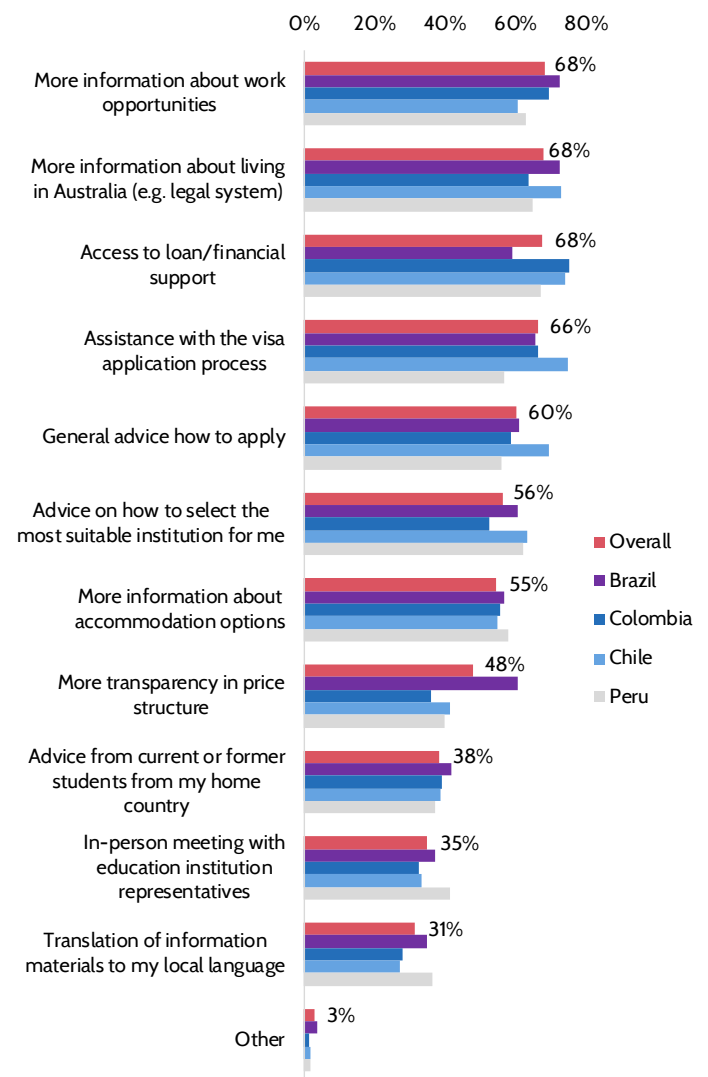
n=851; multiple answers possible

When queried on what would help students plan their studies in Australia, more information about work opportunities and living in Australia, as well as access to loans or financial support, were the most commonly referenced.

There were some differences in responses based on respondent nationalities. Brazilian students were more concerned about transparency in price structures and information about work

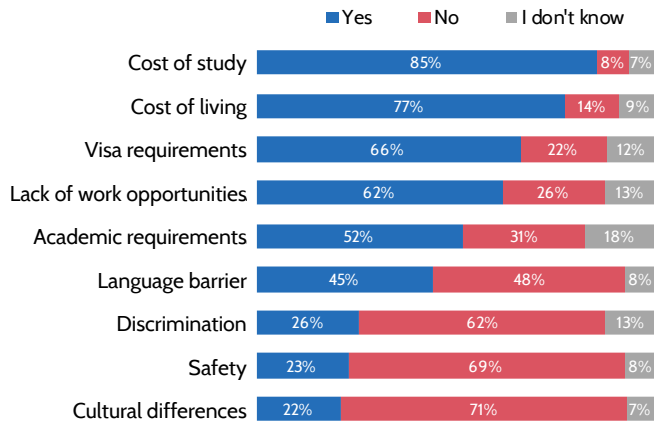
opportunities than other Latin American students, for example. Colombian students were, more than other nationalities, interested in access to loans and financial support while Chilean students would appreciate assistance with the visa application process.

WHAT WOULD HELP STUDENTS WITH PLANS TO STUDY IN AUSTRALIA?



n=1,395; multiple answers possible

STUDENTS' CONCERNS ABOUT AUSTRALIA

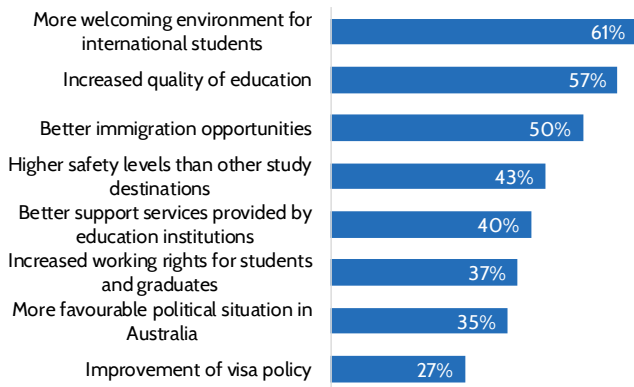


n=1,372; percentages do not add up to 100% due to rounding

Students' concerns about studying in Australia centre around cost, both of study (85 per cent) and living (77 per cent). When broken down into nationalities, Colombians worry about cost most (cost of study 90 per cent, cost of living 85 per cent). Cost of living was a concern for 84 per cent of Peruvian students, 72 per cent of Brazilian students and 65 per cent of Chilean students. Colombian students were also more concerned about a lack of work opportunities than other nationalities, with 71 per cent indicating this.

The majority of students (69 per cent) reported that Australia was becoming a more popular study destination in their home country. It was perceived that this was due to Australia's more welcoming environment for international students (61 per cent), the increased quality of Australia's education (57 per cent) and better immigration opportunities (50 per cent).

REASONS FOR INCREASED POPULARITY OF AUSTRALIA AS A STUDY DESTINATION

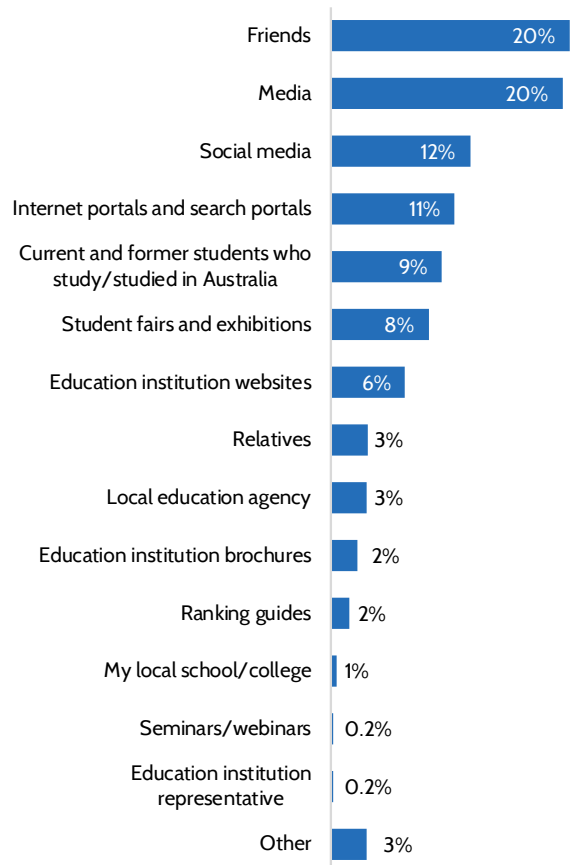


n=2,583; multiple answers possible

Of students planning to study in Australia, 16 per cent indicated that they planned to return home immediately after the completion of their studies, with the majority looking to work or seek residency or citizenship in Australia.

Importantly, a relatively small number suggested that they plan to study another course in Australia upon completion (19 per cent of Peruvians, 17 per cent of Colombians, 10 per cent of Brazilians and 9 per cent of Chileans). These figures indicate that more could be done to promote pathways into other courses.

MAIN SOURCE OF INFORMATION ABOUT AUSTRALIA



n=3,790

Friends and media were the most popular sources for information about Australia as a study destination with 20 per cent of respondents opting for each of these two. Current and former students who had studied in Australia were the main source of information about Australia for 9 per cent of respondents, indicating that more could be done to leverage alumni in promotion activities.

Latin American Education Agent Perspectives

Education agents based in Latin America were surveyed on their perspectives on Australia as a study destination in order to supplement information gathered through the student survey. This was an important perspective to bring into the stocktake phase, given the reliance of many institutions on education agents as their sole representatives in the region.

In total, 31 responses were received from agents based in Brazil, Mexico, Colombia, Peru and Chile. The majority of respondents (87 per cent) stated that they recruit students to study VET or ELICOS in Australia.

When marketing Australia as a destination, agents use a variety of selling points: for example, in VET courses, price was the primary selling point as well as the ability to work in Australia. The quality of courses, the opportunity to improve students' employability and the chance to upskill were third equal.

For ELICOS, the most commonly stated selling point was the lifestyle (for example, the people, culture and weather), followed by working rights and the quality of courses.

Agents stated that course quality and working rights were more prominent selling points for prospective higher education students. For schools, the most commonly stated selling point was the lifestyle, followed by the quality of education and the safety of Australia.

When queried about whether students saw ELICOS as a pathway to further study in Australia, 77 per cent stated that this was the case all of the time or sometimes.

When asked which three countries were Australia's biggest competitors, the answers varied slightly by sector. Canada was the most commonly mentioned competitor across all sectors. In VET, this was followed by the USA and New Zealand, whereas in ELICOS this was followed by Ireland and the UK. This largely aligns with the competitors identified by both students and institutions.

When asked about the most compelling reasons students chose to study in other countries beside Australia, the most commonly stated in each sector was that it was cheaper. This was followed by distance.

These results largely support the findings from the other surveys but indicate that more can be done to promote Australia as a destination for quality education, including through education agents. The importance of cost also underlines the importance of price points for students seeking to study in Australia, including through scholarships.

4

Opportunities and Barriers



**Key Opportunities and Barriers for Expanding
Australia's Engagement with Latin America**

A key focus of the Working Group's research and consultation process was to identify the most significant opportunities and barriers for Australia to increase its engagement with Latin America. This understanding is vital in prioritising collective action and targeting resources, the next step in moving beyond simply recognising that a broad range of opportunities exists to lift education, training and research engagement with the region. Building on the findings of its initial sector survey, the Working Group undertook nation-wide consultations to narrow down where stakeholders saw the most important opportunities and barriers.

Opportunities

The consultations found there is widespread interest among Australian stakeholders to deepen engagement with the region. While knowledge and experience of the region vary widely among stakeholders, and there are opportunities specific to different states and territories, there were consistent messages across the consultation process. The following overarching opportunities were collectively identified by all stakeholder groups, with sector-specific considerations noted where applicable.

Opportunities to deepen engagement with specific countries in the region

- Stakeholders identified Brazil, Mexico, Colombia and Chile as the countries with the most opportunity overall for increased engagement, followed by Argentina and Peru. In the researcher survey, respondents' perspectives on where opportunities lie largely reflected the current situation: Brazil was the most common answer (89 per cent), followed by Chile at 58 per cent, Argentina at 56 per cent and Mexico at 44 per cent. Colombia and Uruguay both scored 19 per cent.

Opportunities to increase two-way mobility

- There are a range of opportunities to increase the two-way mobility of students, researchers and academics between Australia and the Latin American region. Current mobility efforts have been primarily focused on bringing Latin American students to Australia, but there is significant appetite within many Latin American countries to host more Australian students. This could be focused on short-term mobility programs initially, to increase familiarity with the region and to defuse safety concerns.

Opportunities to grow and diversify onshore enrolments from Latin America

- Onshore face-to-face delivery was the most commonly identified opportunity for further engagement in the region, particularly in the short term.

- Higher education enrolments could be increased through a focus on postgraduate students, short-term exchange students from countries such as Mexico and scholarship students from the region.
- Packaging courses presents another opportunity, linking higher education or VET courses with initial ELICOS courses to offer a better value proposition to students. To achieve this, institutions across sectors could form consortia to create pathways.
- There are opportunities in promoting Australian education outside of the traditional east coast destinations, emphasising shared industries and priorities that states such as South Australia and Western Australia have with Latin American countries (wine making and mining are two examples).

Longer-term opportunities to expand offshore activity

- In terms of offshore delivery, there are opportunities for online education in Brazil, Mexico and Colombia in particular, but awareness of the quality of Australia's online education needs to first increase. To realise the opportunities, providers saw the need for a better understanding of the specific opportunities available for online and blended delivery of education programs in Latin America and how Australian providers can differentiate themselves from foreign competitors.

Opportunities to grow engagement in specific niche areas of expertise

- Latin America is a large and diverse region, with many active and well-resourced competitors investing in partnerships. Australian stakeholders cannot engage everywhere, particularly in a resource-constrained environment, and so areas of comparative advantage with Australia's recognised expertise should be identified.
- Research collaboration with the region is currently growing but there is still significant potential to expand this

Opportunities

CASE STUDY

The **University of Queensland-Universidad Catolica del Norte English Language Institute (UQ-UCN ELI)** was a joint venture English training institute aimed at capacity development of students/professionals and the general public in respect of their English language skills. It was established in response to increasing demand for English language skills to service the mining sector and general regional development due to the growth of this industry.

The strategic positioning of the centre at the hub of Chile's mining industry in the Antofagasta region allowed significant reach to those with English language needs and also enabled the servicing of staff development needs for multi-national mining firms. The institute achieved success through the:

- Establishment of an international standard English language training institution within Antofagasta
- Teaching and training of over 2,100 participants on public and corporate programs with participants from Antofagasta and the northern region of Chile
- Delivery of more than 220,000 hours of English language tuition since inception
- Successful tendering for and delivery of Chilean Government funded English language training over four years
- Expansion of program delivery to other regions in Chile, servicing key corporate clients and including English language assessment for employees of Chilean and global mining companies
- Contribution to the profile of UQ and its engagement in Chile

There are opportunities for other Australian institutions to deliver similar services offshore, provided significant due diligence is undertaken when selecting partners and appropriate governance processes are applied to ensure compliance and quality outcomes. It is strongly recommended that institutions seeking to deliver offshore seek out appropriate in-country legal and accounting services to ensure the relevant country's legal and regulatory steps are correctly undertaken.

Key learning points:

- It is crucial that the expectations of partners are aligned.
- Institutions must ensure they follow the legal and regulatory steps required by the country in which they are operating.
- An agile model of operation is useful to address changes in the market and cultural operating environment.
- Strong leadership and human resource management practices help to ensure success in offshore delivery.
- Strong quality assurance processes are necessary for offshore delivery.

engagement, particularly by leveraging Australia's expertise in key fields of study (tropical medicine, innovation, education and sustainable mining). Many countries in Latin America have large mining and agricultural sectors, similar to Australia, presenting opportunities to increase research collaboration in these areas, including through greater industry engagement.

Opportunities created by global political developments

- Stakeholders recognised the opportunity to benefit from taking coordinated action in Latin America at this point in time, given a rapidly changing international environment and growing interest in the region in developing more internationalised education systems. As an English-speaking

nation with close links to the Indo-Pacific, Australia could benefit from playing a role as a 'bridge' between Latin America and Asia. Stakeholders noted in particular opportunities arising from the negotiations of a free trade agreement with the Pacific Alliance, the membership of Mexico, Peru and Chile in APEC, and the changing political relationships with the USA that have accelerated a trend of Latin American countries looking to deepen engagement with the Indo-Pacific region.

Opportunities to enhance Australia's messaging and promotion

- Stakeholders frequently noted the opportunity to better promote Australia's education offerings to countries in Latin America. Greater emphasis should be placed on Australia's

CASE STUDY

The **Australia-Americas PhD Research Internship Program** supports postgraduate students from the Americas to develop collaborative partnerships with Australia early in their research careers, fostering ongoing international collaboration between Australia and important emerging research partners such as Argentina, Brazil and Colombia. The program is also an opportunity to foster links between Latin America and countries in other regions.

Ms Gisele Jung Franciscatto, a Brazilian PhD student from the Pontifical Catholic University of Rio Grande do Sul (PUCRS), received funding under the 2018 round of the program to participate in a two-month internship with the University of Adelaide. During her internship, Ms Jung Franciscatto worked on two projects with a team of researchers at the Adelaide Dental School, analysing dental variables in oral health data and reviewing oral device complications. While Ms Jung Franciscatto received guidance from the university's Professor Geoffrey Heithersay and Professor Giampiero Rossi-Fedele, himself a graduate of PUCRS, her internship also allowed her to establish new connections with two Malaysian researchers, Ms Tallan Chew and Ms Garima Sharma.

As a result of the strong relationships formed during her internship, Ms Jung Franciscatto is now collaborating with PUCRS, the University of Adelaide and her Malaysian colleagues on a further project that aims to compare and synthesise oral health data across Asia, Oceania and the Americas. Ms Jung Franciscatto believes this work will not only strengthen research ties between Brazil, Australia, Malaysia and other regional research partners, but that it has the potential to influence health policies to improve oral health outcomes on a global scale.

Key learning points:

- People-to-people links are crucial when establishing longer-term research partnerships between institutions, and can be particularly beneficial at the early-career stage in influencing future engagement.
- Australia can position itself as a bridge for collaboration between Latin America and Asia.

Opportunities

reputation as a quality education provider, rather than simply focusing on Australia's lifestyle and its broad attractiveness as a destination. This is particularly important given that education quality is a significant factor in students' decision-making when considering study destinations and Australia is rarely viewed as the first choice in Latin America in this regard.

- While there are opportunities to further promote the quality of Australia's education to the region, it is also important to convey other benefits to studying in Australia, including student working rights, as these are key drivers for many Latin American students studying abroad. Stakeholders can also further tailor the promotion of Australian education for specific countries within Latin America, to ensure that messages are nuanced and targeted appropriately. For example, students from Peru and Colombia prioritise the quality of education more than other nationalities, whereas students from Brazil are increasingly interested in cultural experiences, affordable courses and cost of living and migration opportunities. The intelligence gathered from prospective students highlights the need for country- and sector-driven marketing strategies, rather than a blanket approach that treats the region as monolithic.
- Expanding engagement with alumni, particularly from sectors outside of higher education, is another important opportunity. This was proposed as a means to promote awareness of Australia and the value of Australian education in Latin America, as well as to deepen connections with the region.

Opportunities to strengthen engagement with education agents

- Increased engagement and closer relationships with education agents based in the region constitute another opportunity for Australian stakeholders. Agents are already playing an important role in the local market (given the aforementioned high reliance of Latin American students on agents) but they can be further leveraged through the improved provision of information about studying in Australia. This would ensure that information provided to prospective students is accurate, comprehensive and pitched appropriately.

Opportunities to partner with Latin American countries on system and policy design to support their education objectives

- Opportunities were identified by stakeholders to work with partners in Latin America to develop and enhance the quality of higher education, VET and English language teaching. Australia has expertise in systems and policy development and is well positioned to support in-country higher education curricula development, assist with the design of VET systems to ensure they meet local skills needs, and provide English teacher training to assist countries in their ambitions to internationalise and improve English language levels.

CASE STUDY

Australia worked with the Pacific Alliance countries (Chile, Colombia, Mexico and Peru) on a project in 2016 to determine the applicability of the APEC occupational standards developed for five occupations in the transport and logistics sector across the Pacific Alliance.

The 47 occupational standards were benchmarked and validated by industry stakeholders in the Pacific Alliance countries as reflecting the skills needs of their transport and logistics sector. The Pacific Alliance countries also developed an additional nine occupational standards for a new occupation (delivery driver). The Australian Government engaged the **Australian Industry Standards** (the Skills Service Organisation (SSO) with responsibility for the transport and logistics sector) to provide technical expertise and project management.

This work was designed to provide businesses operating within and across participating countries with greater understanding and certainty of the core skills required and held by workers in these occupations. The occupational standards have the potential to support the development of training programs by Australian registered training organisation (RTOs), ensuring they are relevant to the labour markets of the countries involved.

Complementary to the Pacific Alliance occupational standards development work was a concurrent pilot of the now-International Skills Training courses for trainers and assessors with Pacific Alliance countries, run by **TAFE Queensland** and **SkillsTech Australia**. The pilot, which ran from July 2016 to January 2017, aimed at developing the skills of trainers and assessors in the transport and logistics sector in competency based training practices.

The previous knowledge and experience of trainers involved in the project enabled them to develop a series of bespoke courses using the TVET units and the Transport and Logistics Occupational Standards as a framework and common point of reference for the participants. The delivery strategies included experiential learning, discovery learning, group and individual research, gamification, role play, reporting and individual presentations.

To promote the TVET courses, meetings were held with representatives of the High Commission in Peru, followed by media exposure and a visit from the Peruvian Minister of Education.

Key learning points:

- Systems development is important as it aligns the VET systems in Latin American countries with Australia's, thereby creating longer-term opportunities for offshore delivery, as well as increased student and teacher mobility.
- It is important that government agencies and providers from the sector work collaboratively when assisting partner countries with system design.
- There is a strong appetite from governments in the region to collaborate on policy and systems issues.

Opportunities

SECTOR-SPECIFIC OPPORTUNITIES

While the majority of opportunities outlined by stakeholders through surveys and consultations apply to all sectors, a number of further sector-specific opportunities were identified. These are listed below.

ELICOS

- Strengthening onshore pathways to encourage more ELICOS students to transition into further study in Australia
- Offshore and online delivery of English language teaching at a price point that meets local needs
- Foster opportunities to deliver teacher training for capacity development in English language teaching

VET

- Promotion of VET courses tailored to job opportunities in students' home countries, linking skills needs with relevant courses
- Promotion of the status of VET, including to Latin American governments, to ensure the value of students' certifications is recognised upon their return to the region
- Working with Australian industry to provide relevant paid internships to Latin American students to increase their employability upon completion of their courses

Higher Education

- Increased focus on onshore delivery of postgraduate qualifications, recognising that many prospective students looking to study in Australia already have undergraduate degrees
- Opportunities to grow engagement with Peru, following the Peru-Australia Free Trade Agreement (PAFTA) side letter on qualification recognition
- Better engagement with regional funding bodies in Latin America, for example the CAPES-PrInt program in Brazil, which promotes the mobility of academics and postgraduate students through institutional partnerships
- Establishment of fora or workshops for the exchange of ideas on specific, targeted subjects (for example, climate change) where Australian and Latin American experts can discuss and strategize on areas of future cooperation, potentially with private sector involvement

Research

- Better engagement with Australian and Latin American industry and government, to ensure research is relevant and applicable to business. This could include private sector sponsorship of collaboration between Australian and Latin American researchers in areas of particular need

Schools

- Improved engagement with school alumni, promoting their return to Australia for further study. This is something which competitors like the USA are doing in a more coherent and comprehensive manner

Barriers

Linked closely to the opportunities for increased engagement are the related barriers to realising those opportunities. The most significant of the barriers identified through the consultations are:

Institutional resource constraints and competing priorities

- Many institutions lack resources to prioritise multiple regions and many have focused on the Indo-Pacific in their strategies, preventing them from intensifying their engagement efforts in Latin America. A number of stakeholders noted that it is difficult to engage with the region because of a lack of interest from their institution's leadership.

Price sensitivity

- The largest barrier cited by providers is the inability of Latin American students to afford study in Australia. A number of institutions noted that discounts and scholarships are often required and that fluctuations in exchange rates have a large impact on onshore student enrolment numbers.

High upfront investment costs and uncertain returns

- As Latin American countries are emerging markets, providers noted the high upfront investment costs of investing in them and voiced concerns around the return on investment in the short term. This is a significant barrier to increased engagement.
- Export Market Development Grants (EMDGs) are considered important in helping education providers engage with the target Latin American countries and diversify offerings. EDMGs are provided by Austrade to assist aspiring and current exporters by reimbursing some export promotion expenses. These EDMGs are crucial to expanding engagement beyond onshore enrolments as they reduce the high upfront cost (and therefore high risk) of other forms of engagement, including offshore delivery.

Strong international competition

- Australia faces strong competition from Canada, the USA, New Zealand and Ireland in Latin America. This represents a barrier for Australia as a smaller player with fewer resources in a region already crowded with fierce competition.

- Canada was consistently identified as the largest competitor for Australia in the region. Students perceive it to be safer and more tolerant than Australia, while Canada actively organises a range of events and initiatives in the region and seeks partnership programs, agreements and MoUs at various levels. Other countries, such as the UK, have more consistent and cohesive marketing strategies than Australia. The UK has actively promoted itself as an English language training destination.

Lack of regional representation and reliance on education agents

- Austrade and the Department of Education and Training in the region have large portfolios, either in terms of trade responsibilities or geographic responsibilities. States and territories outside Queensland and Victoria are impeded by a lack of state trade offices in the region.
- A lack of permanent institutional representation on the ground to build and maintain crucial people-to-people relationships is also a barrier. This can result in a lack of consistent engagement and follow-up, meaning that sporadic visits to the region by stakeholders can too often result in few tangible outcomes.
- The high rate of education agent turnover makes it difficult for providers to manage relationships with their agent representatives in the region. This barrier is compounded by issues around agent quality. Education agents' tendency to promote VET and ELICOS over higher education due to the higher volume (and greater returns) of students is another hurdle.

Lack of market intelligence

- The lack of understanding among key stakeholders of the policy and regulatory environments in Latin America, as well as the funding opportunities provided by regional agencies and education benefits gained through free trade agreements, represents a large barrier.
- Providers are also unsure of the education and training business models needed to meet offshore market demands while being profitable and sustainable.
- In consultations, providers expressed frustration that information and intelligence on education opportunities provided by government bodies focuses less on Latin America and more on countries and regions which are better known to the sector.

Barriers

A lack of mutual understanding between Australia and Latin America

- Relationships between Australia and Latin American countries are still at an earlier phase of development than those with more established partners. The lack of mutual understanding and knowledge between Australia and the respective countries in Latin America is still a challenge that impacts how effectively Australia engages with the region, for example the common misconception that higher education is free in Latin America and so not a market worth pursuing by universities.
- This lack of understanding can lead to stereotyping and negative perceptions on both sides. For Australians, concerns around safety, as well as political and economic instability, can lead to difficulties in encouraging Australian students to study in Latin America.
- There is a perception in Latin America that Australia is money-focused and transactional, with insufficient focus on two-way mobility and equal partnerships. In addition, there are concerns around visa settings and restrictions on accompanying family members and proof of finance requirements, and confusion over country risk ratings.

Fragmented marketing and a need to develop more sophisticated messaging

- Unsophisticated messaging that places undue focus on the lifestyle benefits of living in Australia over the quality of its education offerings constitutes another barrier. This is largely based on a misunderstanding around student motivators and an overreliance on stereotypes. Further, Australia currently has a fragmented approach to marketing and engagement, with a lack of coordination and an overarching brand for Australian education as a whole.

Lack of joint research funding to facilitate collaboration

- When Australian research representatives were asked about the barriers preventing increased engagement with Latin America, lack of funding was the most commonly cited problem for each country.

- Many Latin American countries are seeking joint research funds with governments in partner countries in order to support research collaboration. While Australia's competitors have established a number of these funds, Australia has not, due to a focus on global competitive funding models.

Complex education systems and regulatory settings in the region

- In the VET sector, a widespread lack of recognition of prior learning in Latin America and a consistent focus on hours of study and other inputs rather than outcomes poses a barrier to cooperation and mobility.
- A lack of understanding of qualifications recognition practices and issues is another systemic barrier. Moves to resolve higher education qualifications recognition issues are not well understood in the sector, including the concessions gained through the PAFTA side letter.
- Some institutions noted a reliance on the Country Education Profiles (CEPs), created by the Department of Education and Training, for the purposes of qualification comparison. However, it was pointed out that the CEPs for the countries targeted in this report are in need of updating.

Distance, time zone and language barriers

- The distance between Australia and the Latin American region and their different time zones were frequently cited as a barrier. While this is unavoidable, these issues have been exacerbated by the small number of direct flights from Latin America to Australia. There was frequent discussion around perceptions and the reality, with some stakeholders pointing out that the USA and Canada are not perceived as too distant or difficult due to time differences.
- Another large barrier which cuts across all sectors is Australia's largely monolingual nature, meaning that many Australians lack Spanish and Portuguese capabilities. Some states and territories are seeking to address this, with Victoria experiencing a 400 per cent increase in the number of students learning Spanish in Victorian public schools since 2010.

SECTOR-SPECIFIC BARRIERS

Outside the broader overarching barriers identified above, a number of sector-specific barriers were identified in the consultations. These are listed below.

ELICOS

- Australia's visa settings, particularly the Genuine Temporary Entrant (GTE) requirement under the student visa program. This has had a large impact on the ELICOS sector due to the high number of visa application rejections for students seeking to study standalone ELICOS courses. As the largest sector for Latin American enrolments, this high rejection rate represents a large risk and barrier

VET

- Low status of VET in the region, which can discourage students from studying such courses in Australia despite a high demand for skills. This underscores the mismatch between the education system and labour market in many Latin American countries
- Existence of a small number of unscrupulous Australian VET providers, which poses a risk to Australia's reputation internationally. There was a view that there should be a high bar for providers looking to engage internationally to ensure Australia continues to be viewed as a world class training destination

Higher Education

- Reluctance on the part of university leadership to include Latin America in their strategic plans (so as to lift engagement beyond personal connections and establish formal institutional linkages). This was linked to an unwillingness to move beyond more established relationships in Europe, North America and Asia, as institutions are wary about shifting their investment to regions with high upfront costs and unclear returns
- Focus of Latin American scholarship agencies on rankings. Apart from reducing the possible pool of Latin American students supported to study in Australia, this emphasis also means that some universities, particularly in regional and rural areas, can struggle to engage with potential partners in the region despite clear alignment in expertise and priorities

Research

- Lack of understanding around where the centres of research excellence are located in key Latin American countries and where efforts should be focused, as there is limited knowledge regarding the research priorities of Latin American governments and institutions
- Hesitance on the part of Australian researchers to collaborate with their Latin American counterparts, in part due to a belief that it does not lead to career advancement

Schools

- Low Latin American student base and minimal current level of engagement in the schools sector. As a result, there is little awareness in this sector of any demand from the region

5

Recommendations and the Way Forward



Navigating the Approach for Increased Engagement

Recommendations

Education, training and research engagement between Australia and Latin America is growing. Australia needs to collectively prioritise Latin America, aligning and amplifying its efforts, to be successful longer-term in developing sustainable partnerships with the region.

Informed by its consultations and research, the Working Group recommends four overarching issues be addressed to lift Australian engagement across the education, training and research sectors. These are:

- **Building knowledge of Latin America within Australia;**
- **Expanding engagement between Australia and emerging partners in Latin America;**
- **Promoting Australia in a more targeted and coordinated way;**
- **Committing to action by enhancing leadership and coordination efforts to ensure Australia develops ongoing and sustainable relationships with Latin America.**

As Australia seeks to diversify its international education sector, this report's recommendations are intended to inform the approach by government, the education sector and industry to building engagement with Latin America through to 2025.

Recognising Australia's relationships within Latin America are less mature, the report's recommendations acknowledge the importance of government-to-government engagement in laying the foundations for Australia's education, training and research sectors to increase partnerships in the region. At the same time, peak bodies, institutions and industry must consciously invest time, efforts and resources in the region if Australia is to fully realise its ambition to strengthen its connections with Latin America.

The report's recommendations also take account of the diversity of experiences in Australia's international education engagement with Latin America, informing implementation of existing strategies or the development of new ones by stakeholders. Similarly, the broad scope of this report – the entirety of education engagement in Latin America – means its recommendations can only provide a broad context for developing or implementing tailored, country-specific strategies going forward.



BUILDING KNOWLEDGE

1.1 Provide more market intelligence from Australian Government posts in the Latin American region to the Australian international education sector

There is a strong appetite from education, training and research stakeholders for more market intelligence from Australian Government posts in the Latin American region. Given the lack of knowledge around Latin America in the sector, a lack of English language resources in the region and limited in-country institutional representation, federal and state and territory agencies have an important role to play in bridging this knowledge gap. In particular, more information is sought on:

- Education, training and research systems and regulations in key countries, including government policies and priorities;
- Commercial operating environments in the region and how they impact providers engaged in transnational delivery;
- Outcomes from free trade agreements and detail on what these outcomes mean for providers considering entry into new markets;
- Competitor activity in the region, including best practices and where Australia can learn from different approaches to education products and delivery;
- Information on institutions that deliver programs in English to help identify new opportunities for mobility into Latin America;
- Sector-specific updates from the region, including in the schools sector, which is less understood in terms of potential partnerships and exchange.

1.2 Embed a focus on Latin America into sector-led networks, communication channels and events

While some Australian education providers and research organisations have a strong understanding of Latin America, others are looking to build their awareness of how to effectively engage with the region and learn from the lessons of other institutions. To help disseminate information through the sector more regularly, all stakeholders should commit to featuring Latin American case studies and insights into building effective partnerships in the region across their communication channels to raise awareness of opportunities and increase understanding. The sector can:

- Develop a Latin America engagement network group through organisations such as the International Education Association of Australia (IEAA);

Recommendations

- Include Latin America on the agenda for the annual Australian International Education Conference (AIEC) and other relevant education conferences;
- Feature Latin America in sectoral newsletters, social media accounts and other communication channels.

1.3 Identify and develop information resources on Latin American centres of research excellence to support opportunities for research collaboration

To promote greater research collaboration between Australia and Latin America, research organisations and researchers need information about where to find partners with relevant expertise and capabilities. Personal networks play an important role in driving such collaboration, but a more systematic approach is provided by information resources and platforms to help potential collaborators identify each other. This would also help to inform the development of university partnerships, as research has become an increasingly important focus for such agreements with Latin American counterparts.

To support Australian researchers to find quality partners in Latin America to initiate collaborations, government, industry and sector stakeholders can:

- Identify and translate existing information resources from partner agencies and organisations;
- Create communities of research practice to bring together researchers collaborating with Latin America;
- Develop new information resources that outline research for dissemination to Australian stakeholders.

1.4 Connect with Latin American embassies and diaspora communities to promote greater understanding of the region in Australia

Latin American embassies in Australia have a strong record in supporting greater education, training and research linkages between Australia and the region. Better connections between embassies and the sector would provide valuable insights into opportunities to enhance engagement with partner countries, as well as how to strengthen connections with diaspora communities. To deepen relationships with Latin American communities in Australia, sector stakeholders can:

- Engage with student groups from Latin American countries;
- Collaborate with community associations on events;
- Share information on international mobility and collaboration opportunities with embassies.

EXPANDING ENGAGEMENT

2.1 Increase transparency and information on Australian visa settings to support student mobility

The Working Group's consultations found widespread concern in the education and training sectors around an increase in visa refusal rates in Latin America, most noticeably in the VET and ELICOS sectors. In particular, there is a commonly held view that Genuine Temporary Entrant (GTE) requirements are being applied inconsistently and there is a lack of consistent messaging across government agencies. To address this, the Department of Home Affairs and Austrade can:

- Provide clear and transparent information for students, education agents and Australian providers to ensure genuine students are able to effectively meet visa application requirements to undertake their study in Australia;
- Engage with the sector on changes in policy settings that might impact student recruitment activities in Latin America.

2.2 Engage at a government-to-government level on systems development and alignment, including participation in multilateral fora engaging Latin America and development of regional occupational standards.

Government-to-government engagement plays a critical role in establishing the long-term foundations for greater education, training and research engagement between Australia and the Latin American region. As governments across the region look to lift the quality of their education, training and research systems, develop sustainable funding models for tertiary education and upskill their populations to meet labour market demands, Australia can position itself as a knowledge partner of choice. The Department of Education and Training and state and territory governments should work closely with the Australian sector to build on systems development and alignment activities and

promote Australia's policy expertise. Priority issues for government-to-government engagement include:

- Quality assurance in higher education and VET, which would help showcase the quality of Australia's education and encourage Latin American governments and scholarship agencies to take a more nuanced approach when approving eligible partners for scholarship programs than simply considering overall international rankings;
- Development of regional occupational standards and/or flexible and industry-led VET systems, highlighting the importance of VET in meeting local skills needs and lifting its status in the region;
- Active participation in multilateral fora that include Latin America, including APEC and the Pacific Alliance;
- Qualifications recognition, specifically better understanding of where there are barriers to recognition of Australian qualifications and supporting the recognition of Latin American qualifications through updating Australia's Country Education Profiles.

2.3 Invest in a Latin American research fund to support joint projects with partner research agencies

Australian stakeholders can do more to effectively promote existing international competitive funding programs such as the Australian Research Council's *National Competitive Grants Program* and the Department of Industry, *Innovation and Science's Global Innovation Linkages Program*. However, a number of major research funding bodies in Latin America require overarching government-to-government agreements and joint bilateral funds to undertake research collaboration initiatives with international partners. Major competitors such as the USA, Canada, the UK, Germany and Spain have each established a number of such funds in the region, but Australia has not been in a position to explore possible mechanisms to support this collaboration.

To address this issue and send an important signal to governments in the region of Australia's commitment to building engagement, the Australian Government should work with the sector to create a dedicated fund for engagement that would give Australia more flexibility in matching funds from Latin American partners for specific projects of mutual interest. This fund could be supported by contributions from institutions interested in developing their research relationships with Latin America.

2.4 Fund government, sector and industry scholarships to promote greater two-way mobility between Australia and Latin America

Recognising that the relationships between Australia and emerging partners in Latin America are at an earlier stage of development, enhancing people-to-people links through scholarship and mobility initiatives is vital to building longer-term foundations for partnerships. All international education stakeholders can contribute to the development of scholarship programs to build engagement with the region. To leverage these programs most effectively, investments should be long-term, to ensure consistent engagement and trust, and also focus on the outbound mobility of Australians to Latin America, to support deeper connections between Australia and the region:

- At a national level, the ELP is the most significant initiative supporting two-way tertiary education, research and professional mobility with Latin America. Noting the New Colombo Plan limits its focus to the Indo-Pacific, it is vital to ensure that funding is not only allocated to the ELP but also that the program is championed as an investment in supporting two-way mobility with Latin America;
- At the state and territory level, investment in mobility initiatives is also important across education, training and research to help facilitate greater ongoing national or regional exchanges;
- Peak bodies, individual institutions and Australian businesses can all develop scholarship schemes in line with their strategic objectives for engagement with the region.

2.5 Engage in consortia to respond to large-scale opportunities and overcome barriers to investment

The scale of Latin America and the high costs of engagement compared to closer neighbours make it challenging for individual providers to respond to opportunities in the region. A consortia model to engagement can help overcome price barriers, meet large-scale opportunities for education and training delivery and position Australia more competitively against well-resourced competitors.

- For the sector, consortia may take the form of traditional groupings, but institutions with complementary areas of expertise could also develop new consortia to increase their engagement with the region;
- States and territories can also consider consortia approaches – one example is jointly supporting agent familiarisation activities so that education agents from Latin America can visit more than one state while in Australia, helping to reduce costs for governments and better leveraging the investment for more impact.

Recommendations

2.6 Develop and implement education and training products appropriate for offshore delivery in Latin America, and establish articulation arrangements with local providers

While government can facilitate trade opportunities, providers are the stakeholders that will need to develop quality products to be delivered at an appropriate price point for the market in line with their business models. Likewise, providers will need to invest the bulk of the resources required to negotiate, implement and promote articulation opportunities.

The most frequently cited potential opportunities for offshore delivery to explore included:

- Capacity building programs funded by regional governments and organisations;
- VET;
- English language teaching;
- Teacher training;
- Online delivery.

2.7 Pilot a new approach to market development grants (either through EMDG or other grant program) to support Australian providers enter Latin American markets

In Latin America, market development is at an early stage and upfront investment costs for providers are high, potentially discouraging market entry. To overcome this barrier, the Working Group recommends consideration of a pilot targeted grant/subsidy program (through EMDG or other grant program) for Australian education providers to export services to key Latin American markets. This could support market promotion and follow research and development of appropriate models for offshore delivery by the sector, and potentially support the implementation of the TPP-11 and PAFTA.



3.1 Advance a national and consistent narrative focused on the quality of Australian education, training and research

The lack of a consistent national narrative for Australia in Latin America has led to challenges around fragmentation of messaging, as well as perceptions that Australia is one-dimensional in its focus on commercial benefits from education engagement and sells a lifestyle brand rather than a message of quality education, training and research. Austrade's work on a new Australia's Nation Brand and the development of a Strategic Messaging Framework for the international education sector is an important step in addressing the issues currently impacting Australia's positioning in Latin America, but implementation will be critical through:

- Austrade's leadership in marketing and promotion activities for the international education sector;
- State and territory governments connecting their own messaging to the broader national narrative;
- Buy-in from all Australian providers operating in Latin America, drawing on the common messaging in their promotional materials while tailoring their pitches for their own selling points and the local contexts.

3.2 Promote and leverage Australia's reputation in English language teaching

Australia's English language teaching or ELICOS sector attracts the highest number of international students from Latin America to study in Australia. Traditionally these students have primarily elected to study independent ELICOS only. However, more recent trends have highlighted growth in students undertaking further academic study whilst in Australia. To ensure Australia's long-term market position the high-quality ELICOS sector must be actively promoted. Opportunities for further study in Australia should be strategically positioned as part of promotional campaigns and student engagement.

In addition to onshore delivery, there are opportunities to leverage Australia's reputation for English language teaching offshore and online.

Australian education providers expertise in teacher training should be utilised to support capacity development of English language teachers in Latin America.

3.3 Develop alumni engagement strategies that encompass all sectors and build the profile of Australia in Latin America

Alumni are important ambassadors for Australia and can be influential voices in promoting the benefits of an Australian education. Alumni engagement is also important for Australia's public diplomacy agenda in building deeper long-term links with partner countries. DFAT has developed Australia's *Global Alumni Strategy*, which has a focus on connecting, mobilising and celebrating alumni. To support more tailored and coordinated alumni engagement in Latin America, all stakeholders should focus on:

- Engaging effectively with alumni who have undertaken ELICOS or VET studies while in Australia, noting these are the largest sectors for Latin American students, as well as higher education alumni;
- Identifying how Australian alumni could connect more easily with employers in the region, including Australian businesses;
- Leveraging events and engagement mechanisms to help champion Australia to a broader audience.

3.4 Strengthen relationships with quality education agents

Education agents are important actors in Australia's engagement with Latin America and cannot be ignored when thinking about enhancing its positioning in the region. Quality education agents are important advocates for Australia, raising awareness of the benefits of an Australian education experience. Conversely, there are significant risks to Australia's reputation in the region if institutions engage education agents who behave dishonestly or provide inaccurate information. To strengthen relationships with agents:

- Austrade, the Department of Home Affairs, state and territory governments and providers should support education agent training activities within the region to equip agents with the necessary information and enable them to accurately and effectively promote Australian education;
- Providers should work with reputable education agents and conduct due diligence, supported by increased transparency measures around education agent performance that have been implemented by the Department of Education and Training;
- Providers should develop ongoing relationships with quality education agents, supported by regular communication.

3.5 Develop a greater digital presence in Spanish and Portuguese to promote Australia's education, training and research institutions

The high cost of travel to the region for Australian providers to participate in physical events has been identified as a barrier to participation in traditional marketing and recruitment events such as student fairs. There are also questions around whether these traditional mechanisms for engagement are as important as they once were, given the importance of social media and digital resources in reaching target audiences for promotional activities. Stakeholders should increase Australia's digital presence in Latin America by:

- Providing information on Australia's education, training and research sectors in Portuguese and Spanish, whether through government websites or institutional platforms and marketing materials;
- Conducting research into the most popular and effective digital platforms in Latin America to ensure messaging reaches target audiences.

3.6 Provide sector funding for Education Ambassador(s) to develop institutional relationships and promote Australian education, training and research capabilities

While delegations and visits can play an important role in creating new partnerships, they are resource-intensive and do not always translate into ongoing engagement upon return to Australia. In-country representation is a valuable asset in building lasting institutional relationships with stakeholders, but there are significant upfront investment costs which can deter individual providers from establishing a presence on the ground. To overcome this barrier, institutions could jointly fund a regional Education Ambassador who could promote their offerings and support the development of institutional partnerships.

- A consortia approach with a particular subset of institutions could help to overcome the challenges with representing an entire sector, with the Ambassador(s) working closely with state and territory government representatives as well as Australian Government representatives in the region to align efforts in line with respective roles and responsibilities.

3.7 Undertake outreach activities to onshore students from Latin America to provide tailored, relevant information on pathways options

The lack of awareness amongst Australian education providers of the profile of Latin American ELICOS and VET students in Australia, which differs significantly to that of students from other regions, has impacted the effectiveness of promoting pathways options. Rather

Recommendations

than using ELICOS as a pathway to undergraduate study, many Latin American students already have undergraduate qualifications and are in Australia for professional development and other purposes. State and territory governments and the sector should focus on promoting pathways into VET courses and postgraduate qualifications, which are more likely to be relevant for these students.



COMMITTING TO ACTION

4.1 Demonstrate commitment to expanding engagement with Latin America at the highest leadership levels

While there are many individuals across the Australian education, training and research sectors who have strong relationships with Latin America, leadership at the highest levels will be vital in building sustainable relationships with partners and raising widespread awareness of the importance of the region for Australia's international education sector.

- Leadership from the highest levels of government can demonstrate the strategic importance of the region, provide support for ongoing coordination mechanisms for engagement, and influence decisions taken by institutions in developing and implementing international engagement strategies. High-level, targeted delegations and visits can send an important signal to both the Australian sector and partners in Latin America about the value placed on engagement;
- At the institutional level, the long-term engagement with Latin America that is needed to produce results is only possible if the leadership is committed and embeds the region into institutional plans.

4.2 Enhance coordination with industry across Australia's education, training and research engagement

Embedding regular engagement between Australian industry and the Australian international education sector is a challenge that goes beyond just Latin America. However, the similar economic profiles of Australia and countries in the region (for example, in agriculture and mining) mean this engagement is particularly important if Australia is to fully leverage its education, training and research expertise. Industry groupings such as ALABC can provide an important bridge between Australian education, training and research institutions and Australian businesses engaged in the region. Mechanisms for enhancing coordination include:

- Participation by the sector in major industry events such as the Latin America Down Under mining conference;
- Engagement with COALAR supported industry events;
- Membership in organisations such as ALABC and participation in networking events.

4.3 Invest in additional resourcing for Australian Government representation in the region to underpin collective action on building knowledge, expanding engagement and promotion of Australia

The Australian Government plays a critical role in providing national leadership and supporting a coordinated effort for education, training and research engagement with Latin America. DFAT and Austrade are represented in all six priority countries identified in this report and are important in supporting Australia's international education sector. However, both agencies have responsibilities that are much broader than just education, which can limit their focus on and investment in supporting engagement. While the placement of a second dedicated Education Counsellor in the region by the Department of Education and Training has been welcomed by the sector, both counsellors retain broad geographical areas of responsibility that make it challenging to deepen Australia's critical relationships. Additional resourcing to underpin collective action could involve:

- Allocation of additional resources to posts in the six countries identified in this report for market intelligence, market development and promotion efforts to support education, training and research engagement;
- An additional Education Counsellor position in the region, possibly in Santiago where Victoria and Queensland representatives are also based;
- Additional representatives from other state and territory governments to build their profile and strengthen relationships in Latin America.

4.4 Create a Reference Group to serve as a focal point for coordination across stakeholder groups and evaluation of progress made in implementing recommendations

Australia's efforts in Latin America have been hampered by a 'stop-start' approach to engagement to date, with a failure to collectively take a long-term perspective on the investment and commitment needed to yield strategic benefits. While COALAR and the Council for International Education provide important fora for coordination, both entities have a broader focus than just education, training and research engagement with Latin America. To ensure there is a mechanism to regularly bring together key stakeholder groups following this report, the Working Group recommends an ongoing Reference Group be created to serve as a bridge between the two councils, the education, training and research sectors and industry.

The Way Forward

This report is only the first step in building sustainable education, training and research engagement between Australia and Latin America. It sends a valuable signal of the strategic importance of the region for Australia's international education sector, and Australian education stakeholders need to commit to implementing its recommendations to achieve meaningful impact.

Following the presentation of this report to the full Council for International Education at the end of 2018, it will be made available to the public, including the many stakeholders that took part in consultations to inform its development. This will allow peak bodies, individual institutions and business groups to consider how they could contribute to the implementation of the report's recommendations.

As a first step to supporting a whole-of-government response to the report, federal and state and territory agencies should map where activity is already occurring and identify further actions to address the report's recommendations. The Austrade-led Market Action Plan for Mexico being developed might provide one avenue to begin these conversations.

Both the Council for International Education Expert Members and COALAR should consider how they will support implementation of the recommendations in line with their missions. This could include:

- Using their influence to champion the importance of engaging with Latin America on education, training and research;
- Supporting the recommendation for an ongoing Reference Group to provide a focal point for the implementation of the report, and advising on possible terms of reference;
- Exploring how initiatives such as the Enabling Growth and Innovation (EGI) fund and COALAR project grants could contribute to supporting more targeted and coordinated education, training and research engagement with the Latin American region.

POTENTIAL FOCUS AREAS FOR A NEW REFERENCE GROUP

The Working Group emphasises that committing to action in Latin America involves leadership, coordination and communication. The creation of an ongoing Australia-Latin America Reference Group would help to drive the development and implementation of a collective response to the four overarching recommendation themes in this report (Building Knowledge, Expanding Engagement, Promoting Australia and Committing to Action), and could consider such things as:

- Engaging with government and the sector on region-specific marketing materials and strategy;
- Identifying mechanisms to better connect education, training and research providers with industry engaged in the region to help meet relevant skills needs;
- Creating communities of practice to share experiences and expertise;
- Providing advice to federal and state and territory agencies on Latin American education, training and research issues;
- Serving as informal ambassadors for engagement with the region to elevate the importance of Latin America.

If Australia is to truly embrace opportunities to grow international education and be successful in expanding its education, training and research engagement with Latin America, it needs to take a long-term view. With overarching frameworks for engagement set out for Australia until 2025 by the *National Strategy for International Education 2025* and *Australian International Education 2025 Roadmap*, Australia has a real and meaningful opportunity to focus the transformation of its education, training and research relationships with the important emerging partners of Latin America.

6

Annex



This annex contains research and information that was not included in the report in the interest of brevity. Specifically, the annex contains additional information on:

- the methodology of the report
- preferred fields of study of Latin American students in Australia
- the sectoral engagement survey
- the research engagement survey
- the student survey, and
- competitor activity, sourced through additional desktop research.

Methodology

Recognising the importance of expanding and diversifying Australia's global engagement in education, training and research and the opportunities to strengthen Australia's competitive position in Latin America, the Chair of the Council of Australia Latin America Relations (COALAR) wrote to the Convenor of the Expert Members of the Council for International Education seeking cooperation to develop a more strategic, coordinated approach to building Australian engagement with the region.

In response, the Council for International Education established the Latin America Working Group made up of representatives from Australia's education, training, research and business sectors, with English Australia CEO Brett Blacker as the chair. The Department of Education and Training provided secretariat support to the Working Group.

SURVEYS

The Working Group began its work by developing a sectoral engagement survey designed for education, training and research providers and a second survey designed for Australian industry engaged in the region.

The purpose of the first survey was to undertake a stocktake of current education, training and research engagement and sector perspectives on opportunities and barriers to future growth. This was distributed through peak bodies and other key stakeholders. The second survey was intended to develop a picture of the skills needs of, and research opportunities facing, Australian businesses so that these could be identified and reflected in the strategic report to the Council for International Education. This was distributed via the ALABC and other relevant networks.

The **sectoral engagement survey** received **80 complete** responses from providers, spanning all states and territories and all sectors.

While the sectoral engagement survey was completed by a diverse range of respondents, the Working Group found that research engagement was not sufficiently represented. In response, the Working Group developed a targeted **research engagement survey**, which was distributed through the Australian Academy of Science and Universities Australia. This survey received **49 complete responses**.

Despite wide distribution through various channels, the **industry survey** received **12 complete responses**. While the responses were useful, the small sample size meant that it was difficult to extrapolate meaningful conclusions from them. The Working Group attempted to engage industry further throughout the process, including through meetings with ALABC. The Working Group concluded that in order to enhance Australia's education, training and research relationship with Latin America, more engagement with industry will be necessary.

Throughout this process, the Department of Education and Training, as Secretariat for the Working Group, simultaneously surveyed relevant federal and state and territory government agencies on their education engagement with the region, as well as their views on opportunities and barriers. This **Whole of Government survey** was intended to supplement the Working Group's surveys and form a more complete picture of Australia's education, training and research activity in the region. This survey received responses from **21 federal and state and territory government agencies**, as well as responses from Australian embassies in the region.

Additionally, Austrade and the Department of Education and Training at Post supported the Working Group by **surveying education agents** based in Latin America. In total, **31 responses** were received from agents based in Brazil, Mexico, Colombia, Peru and Chile.

Finally, recognising the importance of onshore student enrolments in Australia's current engagement with Latin America, the Working Group sought perspectives from Latin American students themselves to better understand Australia's current position in the region. Students' insights were gathered through an online survey of **4,240 students** from the Latin American region, conducted in cooperation with StudentMarketing and BMI. The **student survey**, which was distributed online by BMI, complemented previous undertakings which focused primarily on Australian stakeholders by including Latin American perspectives relevant to onshore delivery.

Methodology

DESKTOP RESEARCH

To supplement the largely qualitative data gathered through the various survey instruments, the Working Group conducted desktop research. This included sourcing quantitative data from the Department of Education and Training, Universities Australia and SciVal. This research was particularly important in creating a snapshot of current engagement with the region, as well as trends over time. This data was also used to ensure that surveys were representative.

In later stages of the project, further research was conducted, including a competitor analysis.

WORKSHOP CONSULTATIONS

Following the completion of the surveys, the Working Group held a series of consultations with key stakeholders in major Australian capital cities (Brisbane, Sydney, Melbourne, Canberra, Adelaide and Perth).

These workshops, facilitated by Brett Blacker, Chair of the Latin America Working Group, and the Hon Phil Honeywood, Convenor of the Expert Members of the Council for International Education, were designed to complement the surveys by eliciting detailed views from participants on opportunities, barriers and recommendations for further engagement with Latin America to inform this report.

Workshops were well attended by stakeholders, including survey respondents, from the education, training and research sectors and government, as well as Working Group members. Participants also included representatives from the industry-focused SSOs. The Working Group then synthesised key findings from the consultations, developing a comprehensive list of opportunities, barriers and recommendations to ensure the report accurately reflected the views of the sector.

Preferred Fields of Study

During the desktop research phase, information was gathered on the preferences of Latin American students in Australia, including their preferred fields of study. These results are summarised below.

The majority of the 13 broad fields of study in higher education experienced growth in Latin American enrolments from 2013 to 2017. Management and Commerce was the most popular broad field of study and grew by 33 per cent in the five years from 2013 to 2017 (1,704 enrolments to 2,273). Dual Qualifications showed the highest growth in percentage terms (115 per cent) during the same period; however, its absolute numbers were low, growing from 108 in 2013 to 232 in 2017.

Total growth in VET enrolments was 211 per cent from 2013 to 2017, increasing from 9,158 to 28,506 enrolments in 2017.

Management and Commerce remains the most popular field of study for Latin American students within VET, accounting for nearly 68 per cent of total VET enrolments and growing by 239 per cent, from 5,717 enrolments in 2013 to 19,362 in 2017.

The highest percentage growth was in Mixed Field Programs (1,356 per cent), which soared from 151 enrolments in 2013 to 2,198 in 2017 or from approximately 2 per cent of total enrolments in 2013 to nearly 8 per cent in 2017.

HIGHER EDUCATION - LATIN AMERICAN ENROLMENTS BY FIELD OF STUDY

RANK	BROAD FIELD OF EDUCATION	2013	2014	2015	2016	2017	2013/2017 CHANGE
1	Management and Commerce	1,704	1,801	1,786	1,942	2,273	33%
2	Society and Culture	471	545	559	528	544	15%
3	Natural and Physical Sciences	420	490	517	509	528	26%
4	Engineering and Related Technologies	366	486	481	477	492	34%
5	Creative Arts	212	208	219	244	328	55%
6	Information Technology	315	337	325	310	317	1%
7	Health	203	233	256	274	307	51%
8	Dual Qualification	108	106	105	141	232	115%
9	Agriculture, Environmental and Rel. Studies	230	263	251	214	229	0%
10	Architecture and Building	114	129	137	122	137	20%
11	Education	104	102	97	103	99	-5%
12	Mixed Field Programmes	33	37	43	44	45	36%
13	Food, Hospitality and Personal Services	24	34	34	30	11	-54%
	Total	4,304	4,771	4,810	4,938	5,542	29%

VET - LATIN AMERICAN ENROLMENTS BY FIELD OF STUDY

RANK	BROAD FIELD OF EDUCATION	2013	2014	2015	2016	2017	2013/2017 CHANGE
1	Management and Commerce	5,717	6,251	8,647	13,164	19,362	239%
2	Society and Culture	1,079	1,352	1,621	1,927	2,405	123%
3	Mixed Field Programmes	151	330	581	1,090	2,198	1,356%
4	Food, Hospitality and Personal Services	623	637	936	1,318	1,575	153%
5	Information Technology	480	613	619	721	1,003	109%
6	Engineering and Related Technologies	227	244	222	282	486	114%
7	Creative Arts	188	197	217	283	414	120%
8	Architecture and Building	79	91	141	233	384	386%
9	Health	373	276	242	290	322	-14%
10	Education	185	293	161	124	256	38%
11	Agriculture, Environmental and Rel. Studies	38	46	33	40	57	50%
12	Natural and Physical Sciences	18	23	34	36	44	144%
	Total	9,158	10,353	13,454	19,508	28,506	211%

Source: Department of Education and Training, 2018

Sectoral Engagement Survey

While a summary of results from the sectoral engagement survey was included in the report, some detail was excluded. This information is summarised below.

DEMOGRAPHICS

Accounting for the high number of dual sector providers, questions allowed respondents to select multiple sectors, where applicable. A majority of respondents (58 per cent) were engaged in only one sector, and of those single sector respondents, 39 per cent were engaged in ELICOS, 26 per cent in higher education, 17 per cent in schools, 15 per cent in VET and 2 per cent in research. A large portion (43 per cent) were engaged in multiple sectors.

The high number of responses from the ELICOS sector was expected given that in 2017 approximately half of the total Latin American enrolments in Australian institutions were in ELICOS courses. Higher education, with 8 per cent of Latin American enrolments, was considerably overrepresented in survey responses.

COMPETITOR ACTIVITY

When asked about Australia’s competitors, the USA was the most commonly cited; however, respondents also noted that Canada was gaining market share in the region due to an aggressive recruitment strategy, capitalising on current anti-American sentiment. Its favourable visa conditions and relative geographical proximity were also cited.

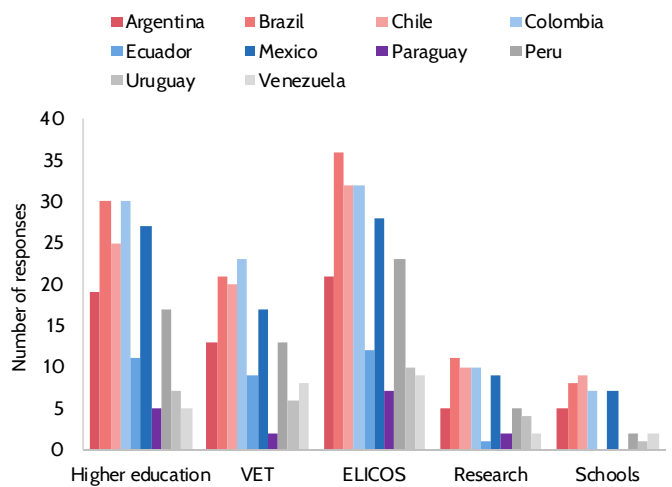
A number of respondents mentioned the UK as a major competitor, along with Germany in the VET sector. Respondents pointed to consistent national marketing approaches by competitors, with many noting that other countries were much more strategic with their engagement in the region.

OPPORTUNITIES

When asked with which countries and in which sectors respondents saw opportunities for increased engagement,

survey respondents indicated that they saw Brazil as a focus for ELICOS. Most answers generally reflected the current situation and activity, with opportunities in the six largest economies of the region: Brazil, Colombia, Chile, Mexico, Argentina and Peru.

WITH WHICH COUNTRIES AND IN WHICH SECTORS DOES YOUR INSTITUTION SEE OPPORTUNITIES FOR INCREASED ENGAGEMENT?

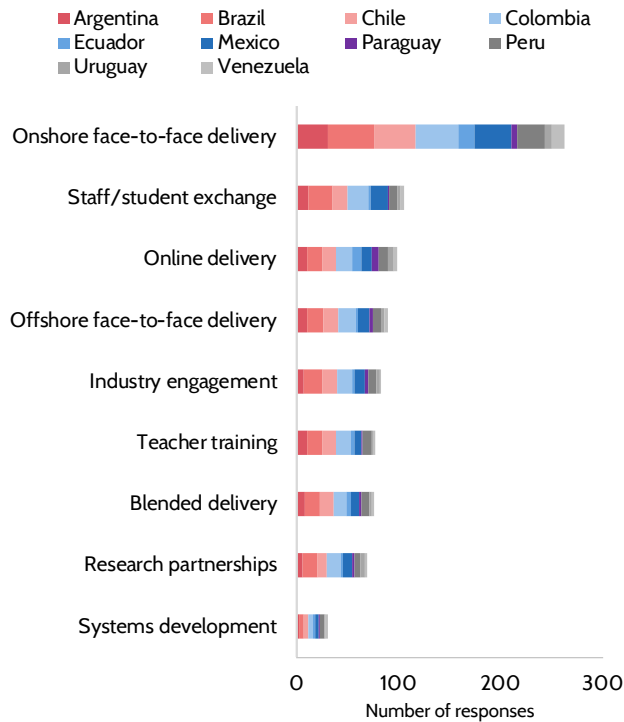


n=67; multiple answers possible

When asked about opportunities, respondents largely reflected current engagement by identifying onshore face-to-face delivery as an area for growth. However, beyond that, other identified opportunities included staff and student exchange, offshore, online or blended delivery, industry engagement, research partnerships and teacher training.

Systems development was not identified as a major opportunity in the survey.

WHAT ARE THE OPPORTUNITIES FOR YOUR INSTITUTION TO FURTHER ENGAGE WITH THE FOLLOWING COUNTRIES?

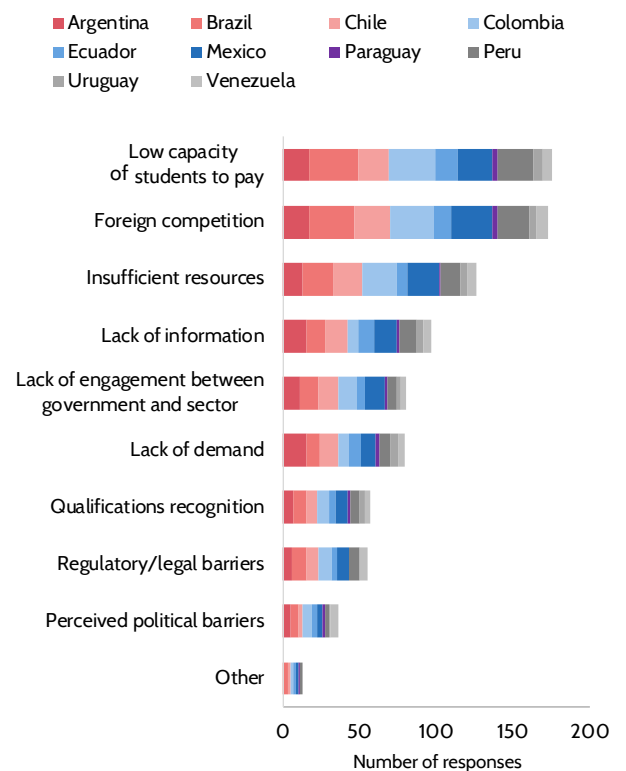


n=64; multiple answers possible

BARRIERS

The most commonly noted barrier was the inability of students to afford to study in Australia but this varied by country. In Chile and Mexico, for example, affordability was seen as secondary to the barrier of foreign competition. Overall, the other most commonly stated barriers were insufficient institutional resources and a lack of information. Demand in Argentina was seen as a significant barrier with 38 per cent of respondents who wished to engage with Argentina seeing this as an issue.

WHAT ARE THE BARRIERS FOR YOUR INSTITUTION TO FURTHER ENGAGE WITH THE FOLLOWING COUNTRIES?



n=67; multiple answers possible

When asked how their institution had overcome barriers for successful outcomes, just under one third of engaged respondents stated that their work with education agents had helped them overcome barriers, while approximately one third stated targeted promotion and marketing had helped.

Some respondents also mentioned creating partnerships with local institutions and offering discounts or payment plans to students to move past challenges.

Sectoral Engagement Survey

WHICH OF THE FOLLOWING WOULD MOST HELP EXPAND ENGAGEMENT WITH LATIN AMERICA?



n=67; percentages do not add up due to rounding

SUGGESTED ACTIONS

Respondents were asked to identify the one activity that would most help expand Australia's education, research and training engagement with Latin America. Approximately half of the respondents stated that increased promotion of Australian education in the region should be the priority. A significant number of respondents (28 per cent) suggested that greater engagement between government, industry and the sector would be the most beneficial.

Research Engagement Survey

The majority of the data gathered from the research engagement survey were included in the body of the report. Additional information sourced through the survey is provided below.

SUGGESTED ACTIONS

When questioned which one action would most help expand research engagement with Latin America, 38 per cent of respondents stated that more or better information was needed about Latin American institutions and joint research opportunities. Twenty-one per cent of respondents stated that more promotion of Australian research expertise was required, while 18 per cent cited more engagement between government and industry and the sector as a whole. Ten per cent of respondents stated that travelling to the region and funding for this, and research, were required.

When looking at more specific information that would benefit researchers, 31 per cent gave no answer while 18 per cent again stated that more information about Latin American research institutions was necessary to increase engagement. Other responses included needing more information about research funding schemes within Australia and in Latin America, and more general responses such as information about research opportunities.

WHICH OF THE FOLLOWING WOULD MOST HELP EXPAND RESEARCH ENGAGEMENT WITH LATIN AMERICA?



n=39; percentages do not add up to 100% due to rounding

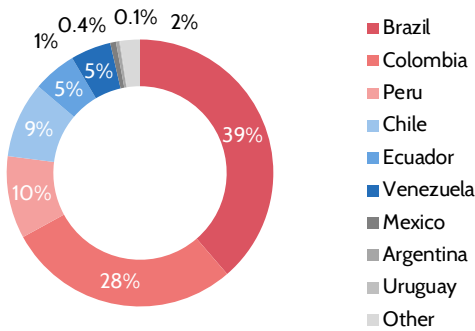
Student Survey

The student survey gathered a large amount of data, both from prospective students and current or past students. Additional information which could not be included in the report is provided below.

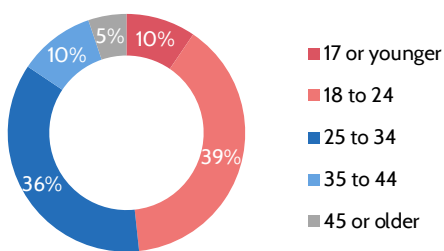
RESPONDENT PROFILE

Of 4,240 respondents participating in the survey, 77 per cent were from the priority countries of Brazil (39 per cent), Colombia (28 per cent), Peru (10 per cent) and Chile (9 per cent), while Argentina and Mexico had an insufficient sample for meaningful data breakdowns.

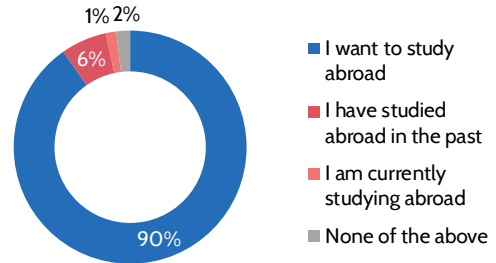
RESPONDENTS BY NATIONALITY



RESPONDENTS BY AGE

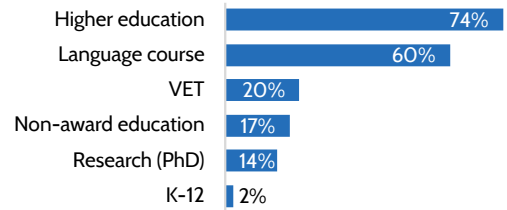


RESPONDENTS BY STATUS



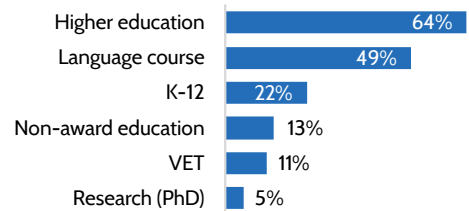
Note: Percentages do not add up to 100% due to rounding.

PROSPECTIVE STUDENTS' PLANNED LEVEL OF STUDY



Note: Multiple answers possible

CURRENT AND FORMER STUDENTS' LEVEL OF STUDY

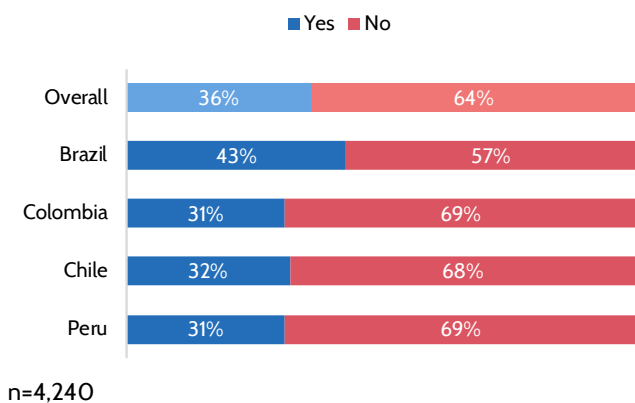


Note: Multiple answers possible

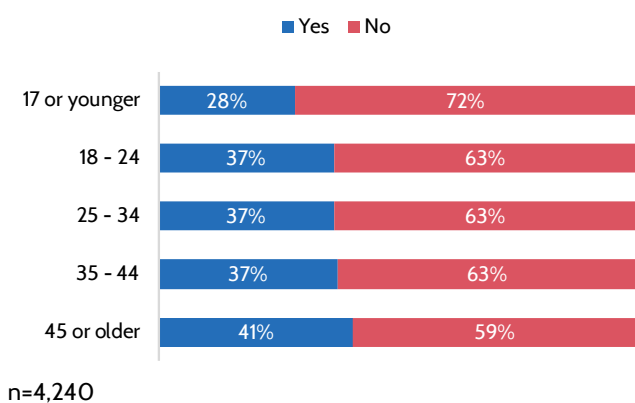
STUDENT DESTINATION CHOICES

A small portion (36 per cent) of all students stated that Australia would be their primary destination of choice for study. The highest positive response towards Australia was from Brazil, where 43 per cent responded positively. Colombian, Chilean and Peruvian students who chose Australia represented 31 per cent, 32 per cent and 31 per cent of their respective nationalities.

PROSPECTIVE STUDENTS: WOULD AUSTRALIA BE YOUR PRIMARY DESTINATION OF CHOICE? - OVERALL AND BY NATIONALITY



PROSPECTIVE STUDENTS: WOULD AUSTRALIA BE YOUR PRIMARY DESTINATION OF CHOICE? - BY AGE

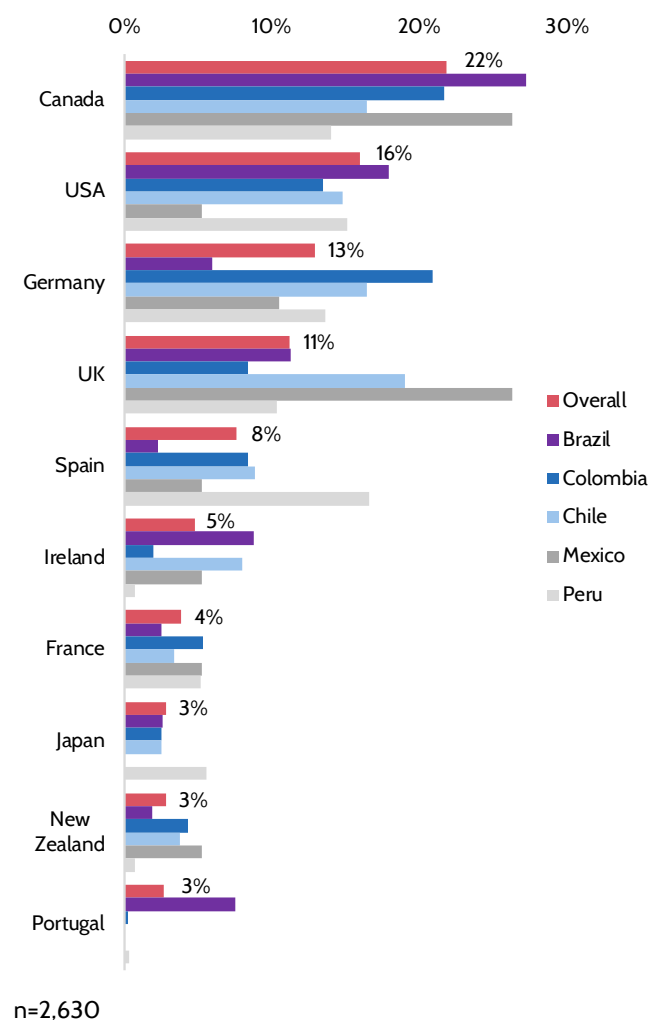


When prospective students were queried by age group as to whether Australia would be their primary destination of choice, 41 per cent of students aged 45 or older stated that it would,

meaning Australia appears to be more attractive for mature-aged students.

When the findings are broken down by age, Canada and the USA seem to be increasingly attractive to students aged 17 and younger (28 per cent and 25 per cent respectively of all prospective students who did not select Australia), with older age groups opting for the UK (the 35-44 age group stood at 14 per cent and for the 45s and over at 16 per cent).

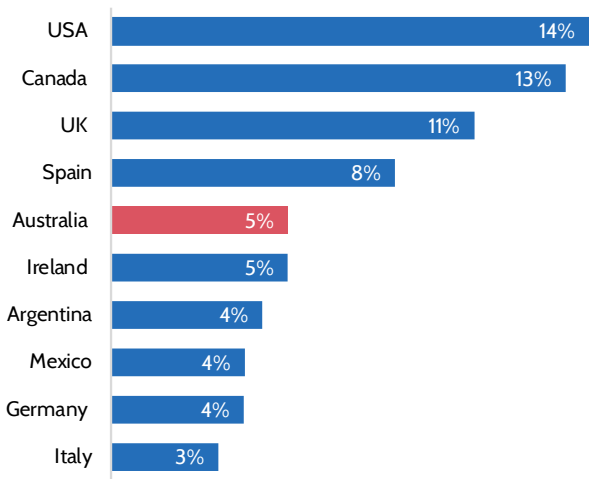
PREFERRED DESTINATION TO STUDY (IF AUSTRALIA NOT YOUR PRIMARY CHOICE)



Student Survey

Australia stood in fifth place of the top 10 study destinations, selected by 5 per cent of current and former students. The USA stood at 14 per cent, closely followed by Canada at 13 per cent, the UK at 11 per cent and Spain at 8 per cent. Ireland stood in 5th equal place with Australia at 5 per cent. Argentina, Mexico and Germany came in 7th equal with 4 per cent each and Italy came in 10th with 3 per cent.

TOP TEN STUDY DESTINATIONS OF CURRENT AND FORMER STUDENT RESPONDENTS



n=382

STUDENTS' REASONING BEHIND DESTINATION CHOICES

Students' reasoning when choosing destinations is telling. Brazilian students, more than other nationalities, appreciated

experience, lifestyle, work opportunities while studying, an affordable cost of living, the opportunity to emigrate and become a citizen or resident, the affordable cost of study and a friendly visa policy.

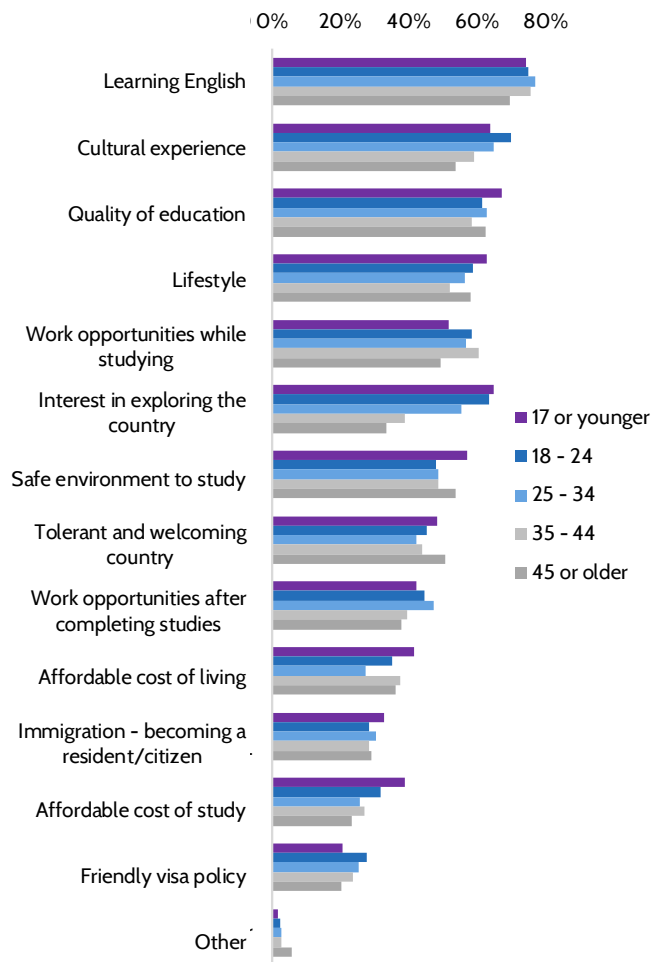
Colombian students, on the other hand, were more interested in the quality of education, exploring the country and potential work opportunities after completing their studies. For Chilean respondents, learning English was a motivator alongside lifestyle, and an interest in exploring Australia. Peruvian students instead chose quality of education as their most popular reason followed by work opportunities after completing studies.

The results were then analysed by age group with the 17 or younger age group reasoning that Australia offered them quality of education, a lifestyle they preferred, the opportunity to explore the country and see what it has to offer and, finally, safety and affordability of study and accommodation.

The 18 to 24 age group reasoned that the main attractions were the cultural experience and the opportunity to explore the country. Older age groups responded with different priorities: they were not interested in the cultural experience cited by the two younger age groups; rather, the 25 to 34 age group preferred the work opportunities that Australia had to offer after completing their studies; the 35 to 44 age group were more concerned with the affordable cost of living; and the 45 and older segment opted for the safety of the environment and the fact that Australia was a tolerant and welcoming country.

Australia led as primary study destination choice for learning a foreign language – more than any other destination – alongside offering a favourable lifestyle and work opportunities after completing studies.

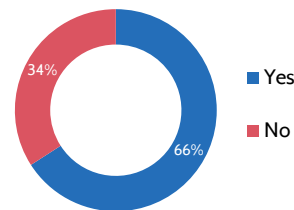
PROSPECTIVE STUDENTS' REASONS TO PREFER AUSTRALIA (RESPONDENTS WHOSE PRIMARY CHOICE IS AUSTRALIA) – OVERALL AND BY AGE



n=1,427; multiple answers possible

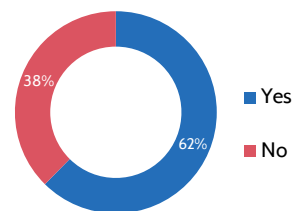
Prospective students were asked whether, in the event that they were unable to go to their preferred destination for any reason, they would then choose Australia as their preferred destination. Seventy-eight per cent of all respondents stated they would opt for Australia as their primary or secondary destination choice. However, Brazilians were less likely to select Australia as their secondary destination (42 per cent preferring not to choose Australia). Nearly two thirds of students (62 per cent) who were queried as to their second choice (if they did not go to their preferred destination) stated that they would go to Australia as their second choice.

PROSPECTIVE STUDENTS: IF YOU DO NOT GET TO YOUR SELECTED DESTINATION, WOULD YOU CONSIDER AUSTRALIA AS YOUR SECOND CHOICE?



n=2,619

CURRENT AND FORMER STUDENTS: IF YOU HAD NOT GONE TO YOUR SELECTED DESTINATION, WOULD YOU HAVE CONSIDERED AUSTRALIA AS YOUR SECOND CHOICE?

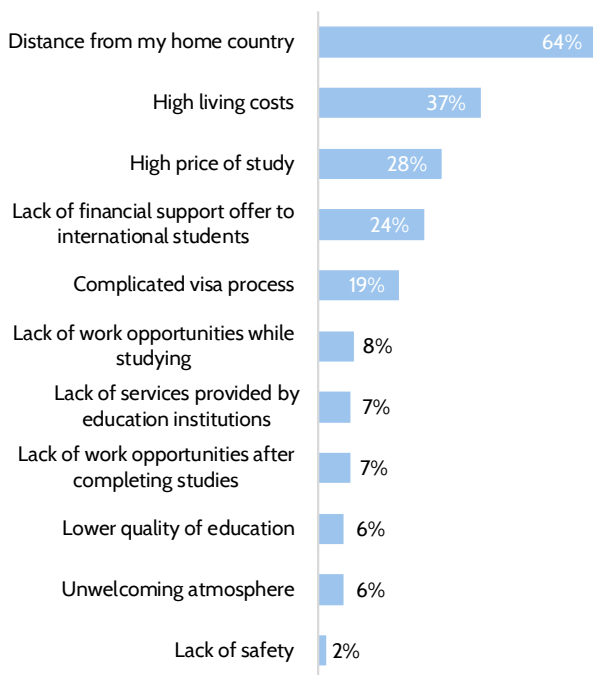


n=340

Student Survey

When current and former students were asked for their reasons for not selecting Australia as a study destination, the answers mirrored those of prospective students. The majority cited distance from their home country as a major factor for not selecting Australia (64 per cent), followed by high living costs (37 per cent) and the high price of study (28 per cent).

CURRENT AND FORMER STUDENTS' REASONS FOR NOT SELECTING AUSTRALIA AS A STUDY DESTINATION



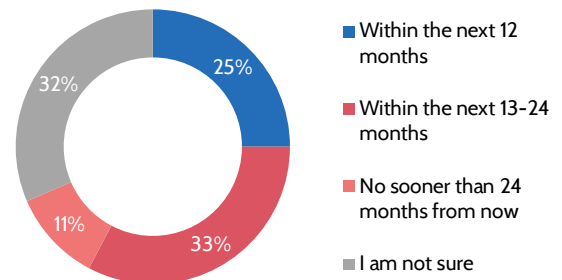
n=124; multiple answers possible

PROSPECTIVE STUDENTS: PLANNING OF STUDY AND CONCERNS

Fifty-eight per cent of prospective students were aiming to commence studies within the next 24 months and nearly a third (32 per cent) were unsure of when they would commence studies.

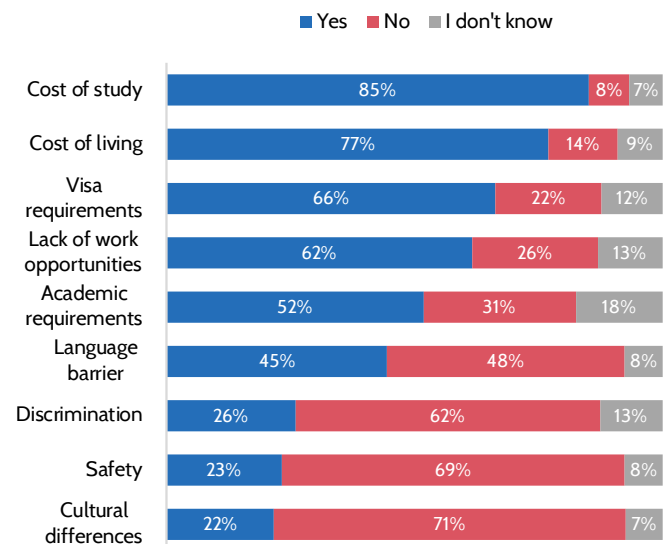
Prospective students' concerns about studying in Australia centre around cost, both of study (85 per cent) and living (77 per cent), visa requirements (66 per cent) and lack of work opportunities (62 per cent).

ESTIMATED STUDY COMMENCEMENT



n=1,414; percentages do not add up to 100% due to rounding

STUDENTS' CONCERNS ABOUT AUSTRALIA



n=1,372; percentages do not add up to 100% due to rounding

When survey results were broken down into nationalities, Colombians were most concerned about the cost of study with 90 per cent stating that this was something they were wary of. In terms of cost of living as a concern among students, prospective Colombian students (85 per cent) felt that Australia might prove to be expensive, while this was the case for 84 per cent of Peruvian students, 72 per cent of Brazilian students and 65 per cent of Chilean students. Colombian students also felt that a lack of work opportunities was a concern with 71 per cent stating this was the case, a higher percentage than other nationalities.

STUDENTS' PLANS AFTER COMPLETION OF STUDIES

When looking at students' motivators for study destinations, it is important to consider their plans after finishing their studies.

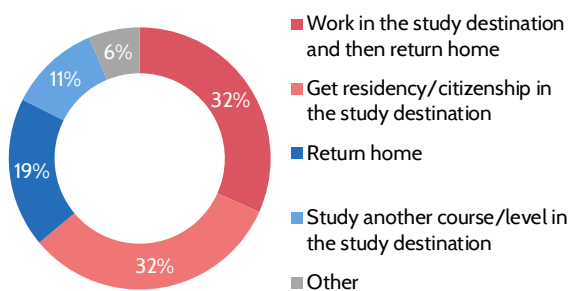
Of students planning to study in Australia, 16 per cent indicated that they planned to return home immediately after the completion of their studies. Nearly half of Chileans (48 per cent) and Peruvians (41 per cent) want to work in Australia for a period and then return home, while approximately a third of Brazilians (30 per cent) would do the same.

A further third of Brazilians (33 per cent) would like to seek residency or citizenship in Australia, with a further 20 per cent wanting to return home immediately after studies. For Chileans wishing to return home immediately after studies, the figure stands at 11 per cent.

Of those students who did not select Australia as their first-choice destination, 32 per cent stated that they would work in the study destination and then return home while another 32 per cent responded that they would like to get residency and perhaps even be naturalised as citizens.

Nearly a fifth of respondents (19 per cent) stated that they would return home after their studies, with a further 11 per cent stating that they would study another course or level in the study destination.

PROSPECTIVE STUDENTS' PLANS AFTER COMPLETION OF STUDIES – STUDENTS WHO DID NOT SELECT AUSTRALIA



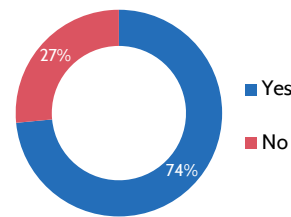
n=2,611

PERCEPTION OF AUSTRALIA

When all current and former students were asked whether Australia is becoming a more popular study destination in their

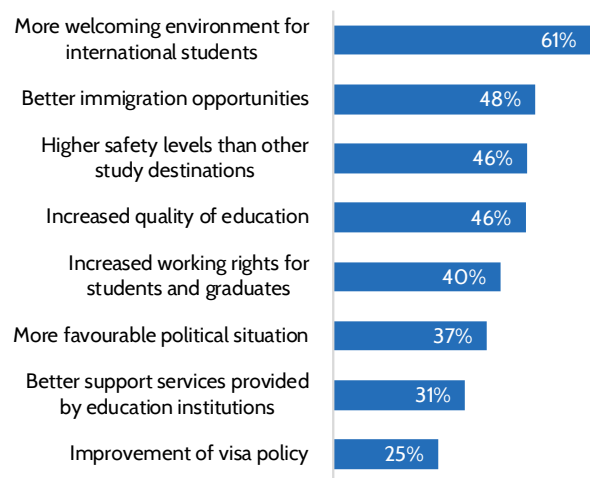
home country, 74 per cent of them stated that it was becoming more popular, while 27 per cent stated that it was not. This is generally in line with the results from prospective students.

CURRENT AND FORMER STUDENTS: DO YOU THINK AUSTRALIA IS BECOMING A MORE POPULAR STUDY DESTINATION IN YOUR HOME COUNTRY?



n=343; percentages do not add up to 100% due to rounding

CURRENT AND FORMER STUDENTS: DO YOU THINK THIS IS BECAUSE ANY OF THE FACTORS BELOW?



n=252; multiple answers possible

Of current and former students, 61 per cent stated that this increased popularity was due to Australia's more welcoming environment for international students. For current and international students, better immigration opportunities were the second most important factor affecting the popularity of Australia in their home countries with 48 per cent stating this was the case.

Key Competitor Activity

As part of the desktop research completed for this report, a competitor analysis was conducted. This is included below.

A number of countries are pursuing increased engagement with Latin America, particularly in the priority countries previously outlined. Brazil is identified as a market of focus in the international education strategies of Canada, the USA, the UK and Ireland. In Canada and the UK, it is joined by Mexico, while Ireland also acknowledged Chile and Argentina as priorities. New Zealand's international education strategy embeds a more holistic approach and focuses on cooperating with the Latin American region as a whole.

Canada is the most active study destination in the region. Through partnership programs, agreements and MoUs at both province and national level, it organises numerous events and initiatives, strengthening its engagement with the region.

Thanks to the perceived high quality of its education offerings and its proximity, the **USA** has traditionally attracted a large number of Latin American students. Current engagement is based on partnership programs and a local network of EducationUSA centres in the region which secure its on-the-ground presence.

The **UK** offers another example of national bodies collaborating with sectoral associations to promote study opportunities in the country. Between 2015 and 2016, English UK, in cooperation with a range of local stakeholders such as event organisers and media outlets, spearheaded an "English is GREAT" campaign, promoting the UK as an English language training destination. Higher education initiatives include the British Council's Brazil-UK university partnership program.

New Zealand, recognising the financial needs of Latin American students, is currently increasing its attractiveness as a study destination by introducing new post-study work rights. Through the *Prime Minister's Scholarship for Latin America (PMSLA)* program, funded by the Government of New Zealand and administered by Education New Zealand, New Zealand has specifically lifted the status of engagement with the Latin American region and sent a signal to the sector of its strategic importance.

Ireland presents itself as a welcoming study destination and, as part of its International Education Strategy, has extended post-study visas to offer postgraduate students the right to work in the country for two years. In the ELICOS sector, the number of Brazilian students soared by 60 per cent between 2017 and 2018.

In addition to the above, many competitor destinations have established joint research funds with Latin American governments. These include Canada's São Paulo Cooperation in Industrial Research and Innovation 2018, and MoUs between the São Paulo Research Foundation (FAPESP) and the National Research Council of Canada (NRC), as well as FAPESP and International Science and Technology Partnerships Canada (ISTP Canada). FAPESP also collaborates with the U.S. National Science Foundation, the German Academic Exchange Service (DAAD) and the British Council.


In Mexico, the Mexican National Council for Science and Technology (CONACYT) and the UK's Economic and Social Research Council (ESRC) have supported joint applications for collaborative projects between Mexico and the UK which seek to enhance understanding of smart cities.

Below is a summary of the competitor countries and their activities in the region.

CANADA

- Identified by students as well as education agents as the biggest competitor across all education sectors
- Gaining market share in the region thanks to a well-versed recruitment strategy
- Also benefiting from the current anti-American sentiment
- Geographical proximity
- Favourable visa conditions
- Possibility to work during exchange programs

STRATEGIES

-  Brazil and Mexico were mentioned as priority markets in Canada's International Education Strategy: *Harnessing Our Knowledge Advantage to Drive Innovation and Prosperity*

PARTNERSHIP PROGRAMS

-  Paraná fala Inglês/Francês (Paraná Speaks English/French) program

AGREEMENTS AND MoUs

-  Formal agreement between Languages Canada and Association of Brazilian Rectors of State and Municipal Universities (ABRUEM)
-  Formal agreement between Languages Canada and the State of Goiás
-  Seven new MoUs between Canadian and Mexican Universities (May 2018)
-  MoU between São Paulo research foundation (FAPESP) and National Research Council of Canada (NRC)
-  MoU between FAPESP and International Science and Technology Partnerships Canada (ISTP Canada)



RESEARCH COLLABORATION

-  Canada – São Paulo Cooperation in Industrial Research and Innovation 2018

MAIN EVENTS

-  Canada-Brazil Language, Education and Workforce Forum (March 2016)
-  Bi-annual Conference of the Americas for International Education (CAIE)
-  Languages Canada Trade Mission to Colombia and Mexico (2016)
-  Languages Canada Trade Mission to Mexico (2017)
-  Languages Canada Trade Mission to Chile (October 2018)
-  Languages Canada webinar for Latin American education agents (2018)
-  CAPS-I (Canadian Association of Public Schools - International) Trade Mission to Brazil (2017)
-  CAPS-I Trade Mission to Mexico (2019)

MULTI-FACETED ACTIVITIES

-  ¡VAMOS A CHILE! - Collaboration mission for education partnership development organised by the Canadian Bureau for International Education
-  Canada Course for Education Agents - online professional development tool run in cooperation with ICEF



Brazil



Mexico



Colombia



Chile



Argentina



Peru




Whole Latin America

Key Competitor Activity

USA

- Despite geographical proximity, the USA is perceived as having a less welcoming atmosphere towards international students in general, especially those from Mexico
- Mentioned by agents as the second most popular destination for university courses
- While studying, it is only possible to work on-campus or as part of Optional Practical Training or Curricular Practical Training
- 11 of the top 20 ranked universities in the world are located in the USA


STRATEGIES

-  Brazil is mentioned as a key country in the *U.S. Department of Education International Strategy 2012-16*



PARTNERSHIP PROGRAMS

-  U.S.-Brazil Binational Fulbright Commission, established in 1957, has supported study and research exchanges for thousands of scholars between the two countries
-  Professional Development of Public School English Language Teachers (PDPI) in the USA
-  Expansion of the English Teaching Assistant Program
-  Extensive scientific exchanges at the individual researcher level (e.g. with U.S. Geological Survey, NASA and the Environmental Protection Agency)
-  U.S. Department of Education - special initiative to increase exchanges between Brazilian universities and Historically Black Colleges and Universities (HBCUs) in the USA
-  U.S. Department of Education - cooperation in migrant education and higher education

RESEARCH COLLABORATION

-  Several programs under collaboration between FAPESP and the U.S. National Science Foundation


MAIN EVENTS

-  U.S.-Mexico Bilateral Forum on Higher Education, Research, and Innovation
-  EducationUSA fairs, organized by local centres (e.g. there are 34 centres in Brazil)

UK

- Traditionally strong English language destination globally; however, not so much in the region (also cited by agents as the third most popular for English language programs after Canada and Ireland)
- Students are eligible to work 20 hours a week during term-time or full-time outside term-time (Tier 4 visa)
- 5 of the top 20 ranked universities in the world are located in the UK



STRATEGIES

-  Brazil and Mexico were identified among eight priority countries for international education in the national education strategy: *Global Growth and Prosperity*

PARTNERSHIP PROGRAMS

-  British Council's Brazil-UK university partnership program
-  Mutual Recognition Agreement between the UK and Chile to promote cooperation in education and mobility



RESEARCH COLLABORATION

-  FAPESP and the British Council signed a MoU to foster research cooperation between scientists in the UK and in the State of Sao Paulo (funding of collaborative research activities)
-  Collaborative research of the Mexican National Council for Science and Technology (CONACYT) and the UK's Economic and Social Research Council (ESRC): Smart Cities in Mexico

MAIN EVENTS

-  English UK's Latin America Regional Fair in Buenos Aires (2017)

MULTI-FACETED ACTIVITIES

-  English is GREAT campaign - a multi-channel campaign to promote the UK as the world's premier English language learning destination in Brazil (2015-2016)
-  Report: *Guide of Brazilian Higher Education courses in English 2016*

NEW ZEALAND

- Introducing a new post-study work rights scheme for international students
- Students can work 20 hours a week during term-time or 40 hours during holidays

STRATEGIES

National *International Education Strategy 2018-2030* identifies Latin America as one of the three Centres of Asia-Pacific Excellence (CAPEs) - funded to enable activities such as study tours for tertiary and secondary school students and short courses

MAIN EVENTS

International Exchange Programs' Famil for Latin American agents visiting 11 high schools

OTHER

Prime Minister's Scholarship for Latin America (PMSLA)

SOUTH AFRICA

- Seen as an alternative English language training destination for Latin American students

PARTNERSHIP PROGRAMS

BELTA and Education South Africa (EduSA) have signed a MoU to grow and develop the ELT market through service excellence

IRELAND

- Identified as the second most popular ELT destination after Canada
- Students are allowed to work 20 hours a week during term-time or full-time outside term-time

STRATEGIES

Irish Education Globally Connected: An International Education Strategy for Ireland, 2016-2020 specifies Brazil, Mexico, Chile, Argentina as markets of focus

MAIN EVENTS

Marketing English in Ireland Latin American Agent fam trip in 2018



Education in Ireland - Trade mission to Brazil, 2018

