



Australian Government

Australian Education International

AEI INTERNATIONAL EDUCATION BRIEFING

HOTEL REALM, CANBERRA, 4 MARCH 2011

EUROPE, MIDDLE EAST AND AMERICAS SESSION

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Introduction and Context - Australian Education International (AEI)/Austrade transition and implications for North America and Latin America

Machinery of government changes announced in late 2009 resulted in the closure of the AEI Latin America office with headquarters in Santiago, Chile and branch offices in Mexico City and Sao Paulo. AEI Education Counsellor, North America position based in Washington D.C. was retained.

Austrade created the position of Education Commissioner, Americas region based in Santiago, Chile with education sector specialists located in Toronto, Washington D.C., Mexico City, Sao Paulo, Lima, Santiago and Buenos Aires.

Current size of the market

The Americas region accounts for 7.85% of global enrolments (YTD December 2010). This remains relatively unchanged since 2009. The region accounts for 10.51% of global commencements (YTD December 2010). This represents an increase from YTD December 2009 when the figure stood at 9.85%.

Long-term vision and strategic goals for the region

Increase percentage of global enrolments and commencements coming from the Americas by promoting the region as a principal market for diversification both in terms of source countries and fields of study.

Position Australia in the region as a key international education destination primarily based on the quality of our education system, ensuring that more future business, political and academic leaders from the Americas are educated in Australia.

Support internationalisation of Australian education by providing market intelligence and advice to Australian education and training institutions so that their engagement with the Americas region is long-term, strategic and sustainable.

Work with broader Austrade network and other industry teams to identify new opportunities for Australia's education and training sector (transversal or cross-sectoral opportunities), e.g. mining and education, water and education.

What are the underlying principles to achieve these goals?

Thinking outside the box by embracing change, maximising opportunities, and harvesting the talent of the regional team.

Always asking how Austrade can add value to the work of the sector.

Key highlights from the region

Two important government-to-government agreements have been signed by Austrade in Latin America to promote the full suite of the Australian Government's Australia Awards in Latin America in 2011 for 2012 intake. Awards are merit based and not capped.

Awards available include:

- Postgraduate; Research Fellowships; Vocational Education and Training (Diploma, Advanced Diploma and Associate Degree level); and Executive Awards for professional development.
- AusAID: implementation of AusAID's Australian Development Scholarship Program for Latin America in 2011 for 2012 intake. Up to 60 postgraduate scholarships available at Masters and PhD level. Countries of

focus include Mexico, Colombia, Peru, Chile and Argentina; areas of focus include Water, Mining, Natural Resource Management, Governance and Rural Livelihood.

Promotion of the full suite of Australian Government Scholarships – the Australia Awards – will allow Austrade to engage with local governments, enhance and develop networks and contacts, learn more about local skills gaps, reinforce Austrade’s cross-sectoral approach to the promotion of Australian education and identify new opportunities in-market.

- Important investment in *Canadian market research* to learn more about Canadian student perceptions of Australia, competitor countries and upcoming areas of study that Australia may be able to offer.
- *Academic Missions* organised around key themes based on successful Life Sciences Delegation to Canada. Future themes will include water, clean energy and possibly environmental sciences. These will take place across the Americas including Canada, the US and Latin America.
- Development of *Schools Reference Group* to identify parameters for market research, sector strategy, and marketing and promotional plan.
- Closer *collaboration with peak ELICOS industry body*, English Australia. Explore potential to engage more closely with Tourism Australia. Continuously lobby on behalf of sector in Latin America.
- *Vocational Education and Training (VET) opportunities* likely to arise from cross-sectoral approach. Consideration of outbound delegations including HR Managers from the mining industry, for example. Exploration of how to work with US and Canadian VET providers.

Marketing and Promotion of Australian Education

High exposure, high impact activities. Two-pronged approach:

(1) Maximise visibility and understanding of Australia as an international education destination e.g. Latin America media mission to Australia.

(2) Emphasise quality message e.g. planning visit by Executive Director of Australian Qualifications Framework Council to key Latin American markets to ensure promotion and understanding of strengthened AQF model.

Education Agent Engagement Strategy

Strong emphasis on working with and supporting education agents through periodical e-newsletters, agent training sessions, support of agent exhibitions, regular meetings with local agent associations, promotion of Education Agent Training Course (Pieronline’s EATC) and invigilation of exam, and joint research.

Nick Baker, Austrade Trade Commissioner for the Europe/Russia region

Introduction

While Europe is often seen as a large unified market, e.g. European Union (EU) or the Eurozone, it needs to be segmented in terms of Austrade's approach to the marketing and promotion of education to Europe and Russia. While still at times "generalist" these groupings outline Austrade's priorities: Northern Europe, which includes the United Kingdom (UK), Scandinavia, Benelux, Germany and France, where the focus is on postgraduate studies, government supported programs and scholarships, R&D and innovation. These are higher education and commercialisation of R&D markets. Australia's reputation in delivering international quality research is of primary importance in Austrade's marketing approach.

Southern Europe which includes France (again), Spain and Italy. These markets are being driven by governments setting policy on English language targets to help youth better integrate into the EU and become more employable (youth unemployment is 20%+ in these markets). Typically, along with Switzerland, these are solid ELICOS and Working Holiday Maker visa markets.

Finally, Eastern Europe and Russia which attract students wanting to upgrade their English skills or vocational education. While elements of industry linkages exist (mining in Poland and agribusiness in Russia) these are still regarded as emerging markets for Australia.

Background on Austrade's European and Russian engagement

Austrade Europe worked in partnership with Australian Education International (AEI) since 1999 to deliver core services to the education sector as well as to develop and undertake a series of generic market and sector specific initiatives. Russia was covered by this partnership agreement from July 2008.

The European/Russian Education Action Plan for 2010-11 was developed using Austrade's lengthy experience working with AEI and aligning Austrade's core objectives and five main priorities for the promotion and marketing of Australian education and training.

In addition to the more traditional marketing and promotional activities to support the education sector, Austrade is linking relevant activities in education to other key industry sectors such as Clean Energy, Financial Services and Innovation by engaging with European corporates already involved in commercialisation and investment in these sectors. Austrade will also utilise its industry contacts for the benefit of the education sector.

The Europe and Russia Education Action Plan for 2010-11 is designed to deliver specific activities to address strategies and goals keeping five critical success factors in focus:

- Branding and perception of Australia as a quality provider of education, including media;
- Providing market intelligence to the Australian education sector;
- Strategic market positioning of Australia as a high quality provider of education and training services;
- Effective engagement with education agents;
- Working with key stakeholders in Australia and within the region.

Key strategies for Europe and Russia

- Reposition Australian education within the framework of the Australia Unlimited brand position.
- Utilise high achieving alumni for story-telling and testimonials across all sectors.
- Differentiate the value propositions of the different education sectors.
- Alignment with Tourism Australia where relevant (particularly in working holiday maker visa markets).

- Promotion of the pathways of the Australian education system.
- Promotion and distribution of information on legislative and regulatory conditions.

Austrade initiatives

The SIA.org Europe website (17 languages) will be one cornerstone in Austrade's work to profile and brand Australia as a study destination to in-market contacts. The EU is one of the most connected regions and improving internet and access to information via social media will be integral. Austrade's Study in Australia website will be re-freshed this year reflecting a more student friendly portal.

The Visiting Researcher Program (VRP), which Austrade initiated in 2009, will play a significant role in its efforts to strategically position Australia as a postgraduate and PhD study and research destination. In 2011, Austrade has eight funded places for Australian researchers to engage with European partner institutes and promote their research and postgraduate programs to local students. It also provides opportunities for Austrade to arrange meetings for the researchers with local industries on possible commercialisation programs and technology transfers. In 2009 Austrade hosted six researchers to Europe and Russia and seven visiting researchers for 2010. All visiting researchers have focused on various elements related to Clean Energy; however, as this focus may expand into other key industry areas in the future.

Investing in Research Mission: This initiative involves asking a number of main corporates, multinational investors in the pharmaceuticals, aerospace, clean technology and automotive sectors to provide Austrade with a list of their technological needs of their innovation departments. Austrade is currently hosting video conferences with these companies and the commercialisation departments of Australian universities to determine if there is a fit, with the aim of sending shortlisted academics on the mission to the UK, France and Germany in June 2011.

Newsletters to subscribers: Austrade distributes regular newsletters to in-market networks via the SIA.org website. These are professionally written and researched, and include Austrade's network of agents and education gate keepers.

Flagship branding events: Austrade will organise and manage: an Australian stand at the European Association for International Education (EAIE) exhibition and conference in Copenhagen, September 2011; Study in Australia stands at the relevant education trade shows in France, Switzerland, Russia, Poland, Spain, the UK and Scandinavia.

Familiarisation Visits: Expanding knowledge in the region of the strengths of the Australian education system and vice versa is a key priority. Austrade has invited and hosted education journalists to Australia from selected markets such as Russia. Austrade has also facilitated a visit to Europe for the winner of the Prime Minister's award for journalism, the Campus Review's Deputy Editor, to see the Visiting Researcher Program first hand and gauge education policy and practices in several European countries including the EU headquarters in Brussels.

Student seminars through agents/multipliers: During 2010/11 Austrade is conducting a limited number of student seminars in cooperation with multipliers in markets where this is proving to be a valuable vehicle.

Australian student mobility: In conclusion, the EU is a world leader in student mobility and offers several programs for both student and academic exchanges (Erasmus Mundus) as well as academic industry linkages such as the Access 4 EU, Marie Curie and other programs. Often in the eyes of our European partners Australia is seen as not doing enough to get our own students to spend time abroad and build stronger links than any promotional activity ever could.

Lee Kennedy, Austrade Trade Commissioner for the Middle East and North Africa region

Introduction

The Middle East and North Africa (MENA) region covers 20 countries that are typically described as emerging markets for Australia which have displayed significant growth for Australian education institutions in the past five years.

Background

Austrade's strategy is to ensure that Australia builds on its growing position as a high quality study destination for international students in this region and to develop links and synergies between the education sector and other key industry sectors which form part of the Australian Government's overall trade agenda – in particular clean energy and the environment, financial services and investment attraction.

The MENA region offers significant opportunities for Australian education institutions as the region's governments are seeking to diversify the placement of students away from the traditional English language markets of the US, the UK and Canada. As a result, there are increasing numbers of students (both scholarship and privately funded) who are selecting Australian programs.

Traditionally, international education and training opportunities for Australian institutions in the region have been in the recruitment of international students to study in Australia. Recently there has been a drive to develop local institutions to meet the increasing demand for education from a young population, improve the quality of education provision across the education sectors and internationalising systems through student mobility measures and joint research activities.

Australian institutions are well placed to pursue these opportunities with individual Australians well known, highly regarded and frequently employed in senior positions in government and in regional education and training institutions.

Major trends

The MENA region supplies an increasing number of students to Australia each year with significant and growing student bodies from Turkey, Saudi Arabia, Libya, Kuwait and Syria: in 2010, student commencements totalled just over 16,000 = 2.5% growth on 2009, 50% growth on 2008, 400% on 2005. The flow of students from the Middle East and North Africa region is significantly driven by scholarship programs. Saudi Arabia delivers the highest number of students by far, accounting for 46% of the total number of student commencements in 2010.

It is worth noting that regional student data from Australian Education International (AEI) only captures those holding passports from the MENA region. Many South Asian students are also recruited from the region but they are recorded in AEI's data for India, Pakistan and Sri Lanka.

There is a growing appreciation of the quality and affordability of an Australian education compared to the US and the UK.

The MENA region is an important source of postgraduate and research scholarship students. There are established scholarship markets (eg Iran, United Arab Emirates and Saudi Arabia) and developing programs in Iraq, Libya, Kuwait and Syria, and others in the wings like Oman.

MENA students play an increasingly important role for diversity. Some markets have experienced triple/quadruple growth in student numbers over the last few years.

Current, emerging opportunities

Development of further institutional collaboration involving the delivery of in-country programs and teacher and student exchanges. Institutions in the MENA region are increasingly looking for partnerships as the basis for sustainable relationships, not simply direct recruitment.

MENA government-funded scholarship programs are expanding and these provide long term growth prospects through the resulting development of the privately funded student market.

Consultancy and capacity building in distance learning will provide significant opportunities, especially in Saudi Arabia.

Issues and challenges

Broadening the bilateral education and training relationship beyond traditional student recruitment activities. Uncertain political and economic environment in a number of MENA markets (e.g. Libya, Egypt, Iran and Iraq) requires the development and adoption of appropriate risk mitigation strategies.

Processing times for student visas have been perceived to be a deterrent to students, especially for Egypt, Iran, Iraq and Libyan applicants. Government agencies, education agents and institutions need to work together to address this perception.

The perceived benefit of a “traditional” US or UK education combined with strong historical education connections, including active alumni networks and increasing recruitment activity provide Australia with strong competition.

Austrade initiatives

In 2011 the Visiting Researcher Program (VRP) has been expanded from Europe to be offered in an additional 12 countries including four placements in the Middle East and two in Sub-Saharan Africa. The first round of applications closed on 28 February 2011 with nine applications received. Austrade included the VRP in its MENA strategy to promote Australian innovation in these important regions.

Existing Study in Australia (SIA) local websites have been upgraded and additional SIA local websites are being developed in eight key Middle East and African markets. Traditional promotional activities such as road shows, conferences and briefings continue to be key elements of Austrade’s long term engagement.

In support of further collaboration and cooperation in Saudi Arabia, Austrade is coordinating an Australian pavilion at the International Exhibition & Conference for Higher Education (IECHE) in April 2011. Austrade will staff an Australian Government booth, with Austrade, the Department of Immigration and Citizenship and State Government staff providing a broad range of information on applying, studying and living in Australia. More than 20 Australian tertiary institutions will participate in IECHE. Austrade will also organise a number of side activities to strengthen ties with Saudi institutions including the Ministry of Higher Education, Ministry of Health and Saudi universities.

This will be the second instance of Australian participation in IECHE and will offer students within Saudi Arabia the chance to learn about Australia and what Australian universities can offer. The exhibition also is a chance for Saudi and Australian academics to nurture faculty to faculty and institution to institution linkages.

In support of Australia’s education activities, Austrade is also organising for several Australian media outlets to conduct interviews with the Saudi Minister of Higher Education, specifically on the Saudi experience in Australian education.

Di Weddell, Branch Manager, International Strategy, International Group

AEI is continuing to build a strong cooperative relationship with the European Union.

Europe may not be our largest source of international students, although there were nearly 43,000 enrolments by international students from the region in 2010. However, the good news is that we do see continuing growth from the European region. In 2010, enrolments and commencements by new students both grew by 7 per cent.

Since 2003, Australia and the EU have jointly funded 16 strategic exchange programs, involving 47 Australian and 43 European educational institutions.

More than 900 students and 75 academics studied in partner institutions as a result. Going forward, we anticipate this activity will become more closely aligned with our common interests being explored in the regular policy dialogues mentioned below.

Policy dialogues

We are continuing a series of regular policy dialogues with the representatives of the European Commission. The dialogues support the inter-government architecture that shapes opportunities for educational institutions to engage with European partners in areas of student and staff mobility, curricula development and the exchange of research expertise.

Two policy dialogues have been conducted to date on higher education reforms (2009) and qualifications frameworks (2010). A third Policy Dialogue will be hosted by Australia in April 2011, with a focus on early childhood education, where topics of future policy dialogues will be explored.

Australia and EU research projects

In 2010 Australia and the EU launched two research projects: a Pilot Tuning Australia Project and a joint comparative study on Qualifications Frameworks. The Pilot Tuning Australia project aims to define the learning outcomes representative of higher education degrees in specific disciplines across different degree levels. The joint comparative study on Qualifications Frameworks is considering the impact of qualifications frameworks on student mobility and if qualifications frameworks can serve as instruments for pursuing closer international cooperation in the field of qualifications recognition. The results of both studies are due in 2011.

International education discussions

An important international discussion on international education was commenced in the United Kingdom in 2010 – with roundtable discussions in March and December involving representatives from English speaking countries which are engaged in international education.

These roundtable meetings were supported jointly by AEI and the British Council. Discussions involved the promotion of best practice for those engaged in the recruitment of international students. Another roundtable is to take place this year in Canada.