

SERVICES FOR INTERNATIONAL EDUCATION MARKETING

Tom Brennan

Emerging markets in the Amercas – Market opportunities in Chile, Argentina, Venezuela, and Peru

SIEM Americas

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Agenda

- Chile
- Argentina
- Venezuela
- Peru
- Survey Results – Education UK Exhibitions
- Upcoming SIEM activity in Latin America

Chile – General Information

- President of Republic – Sebastian Pinera
- Estimated Population – 17.4 Million
- GDP Total - \$320 Billion
- GDP Per Capita - \$18,400 – 55th in the world – Highest in Latin America
- One of South America's most stable and prosperous nations
- 5th Largest exporter of wine
- Overall trade profile has traditionally been dependent upon copper exports
- 85% Urban Population
 - Santiago metro – 5.8 Million
 - Concepcion – 949,000
 - Valparaiso – 934,000



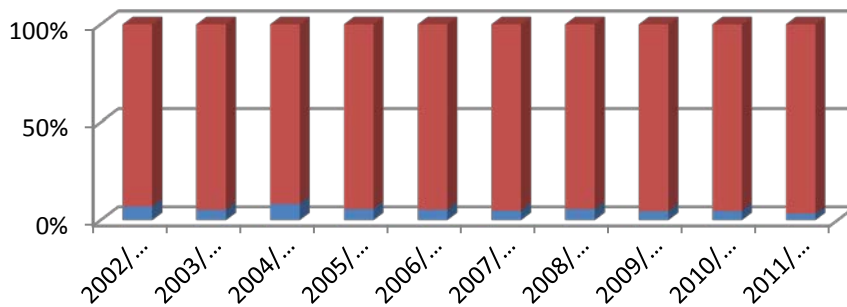
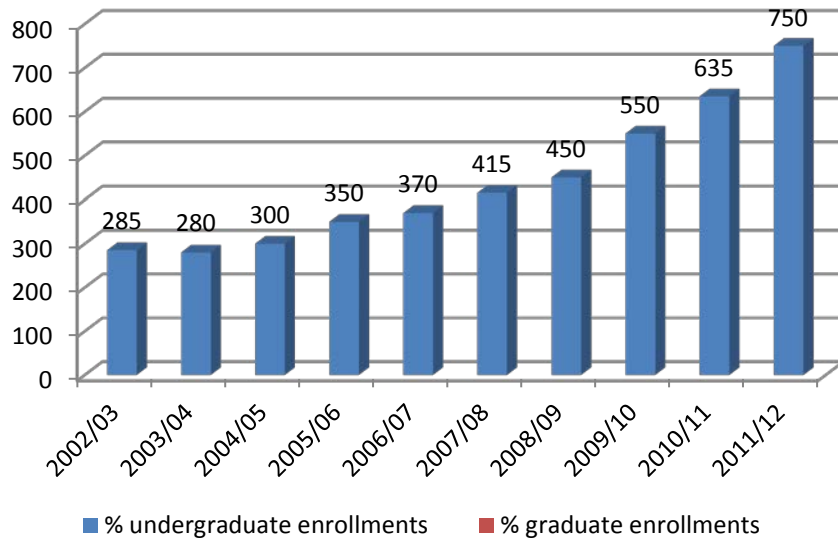
Chile

- First South American Nation to join OECD
- Latin Americas highest HDI (.819 in 2012)
- Ranked 1st in Latin America for Global Competitive Index
- Economist 2011 ranked business environment as the region's best
- FDI plays a decisive role in Chile



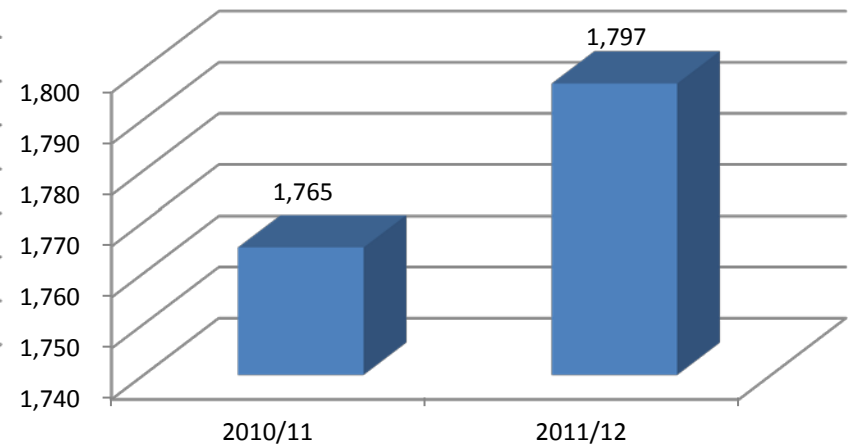
Chilean Student Enrollment Trends

Chilean Students in the UK



Source: HESA Student Record - ©British Council 2013

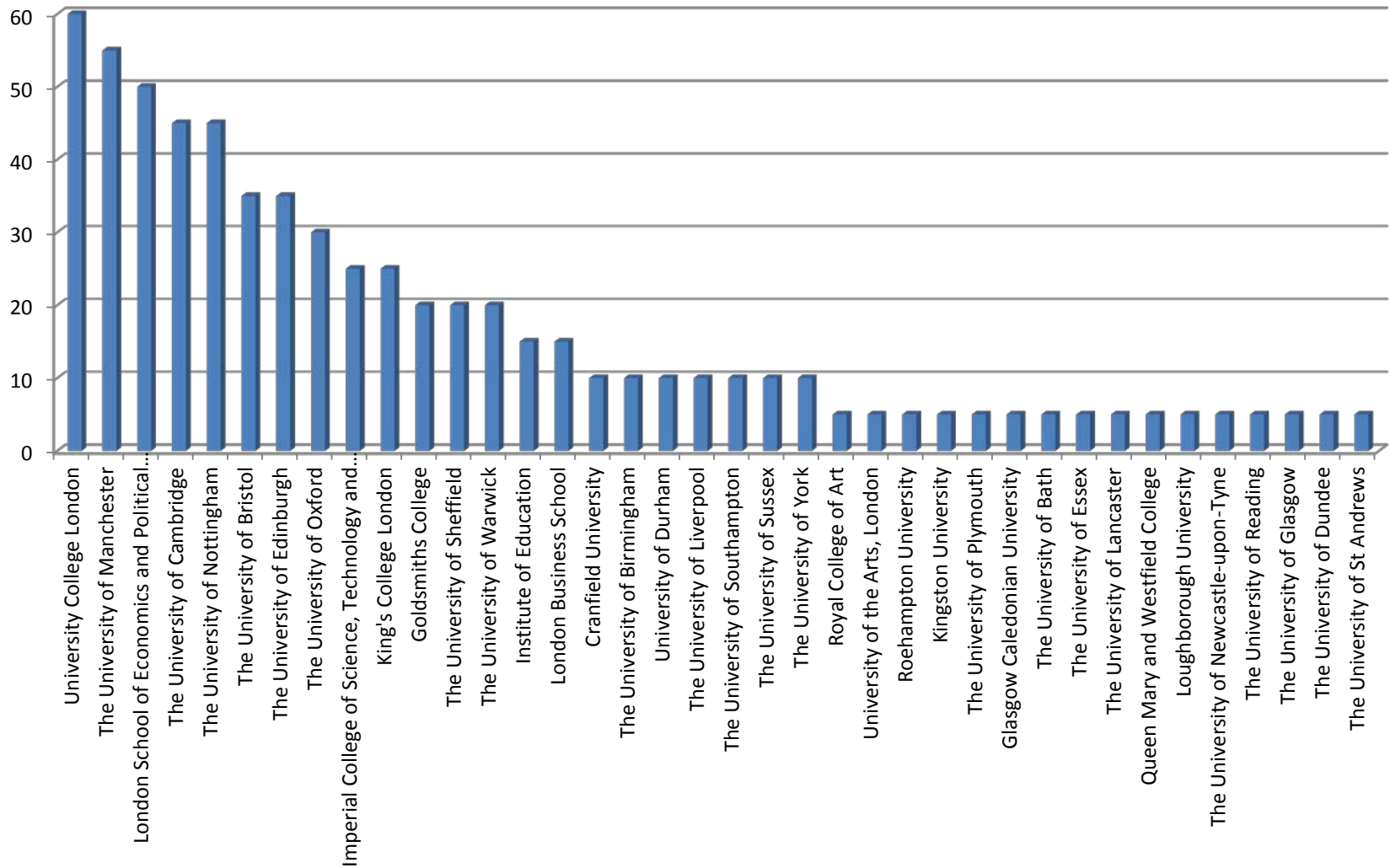
Chilean Students in the US



23% Undergraduate
77% Graduate

Source: IIE Open Doors Report 2012

Chilean Students in the UK 2012



Government incentives for Chilean Students

- Government encourages outbound student mobility
- AGCI
- Chile's Bicentennial Fund for Human Capital Development
- Becas Chile Scholarship
 - energy, biotech, IT, environment, education, health, public policy, mining, aquaculture, food industry, tourism, global services, science and engineering
 - US\$ 6 Billion invested in post graduate study abroad scholarships
 - Previously administered by different ministries and agencies
 - Students must return to Chile
- Exchange Agreements
 - language training and special visas for Chilean students and researchers

QS University Rankings: Latin America Top Chilean Institutions

- #2 - Pontificia Universidad Catolica de Chile
- #5 - Universidad de Chile
- #13 - Universidad de Santiago de Chile (USACH)
- #15 - Universidad de Concepcion
- #36 - Pontificia Universidad Catolica de Valparaiso



International Student Recruitment in Chile

- No clear government policy but some policy measures can be identified
- AGCI - Chilean Agency for International Cooperation
- Joint degree programs
- PROCHILE
- Transnational Education

Factors affecting Chilean student recruitment

- Positive factors
 - Economic stability
 - Young population
 - Lack of post graduate programs
 - Becas Scholarship Program -
- Negative factors
 - Foreign language proficiency
 - Credit transfer system unclear – Not part of NARIC



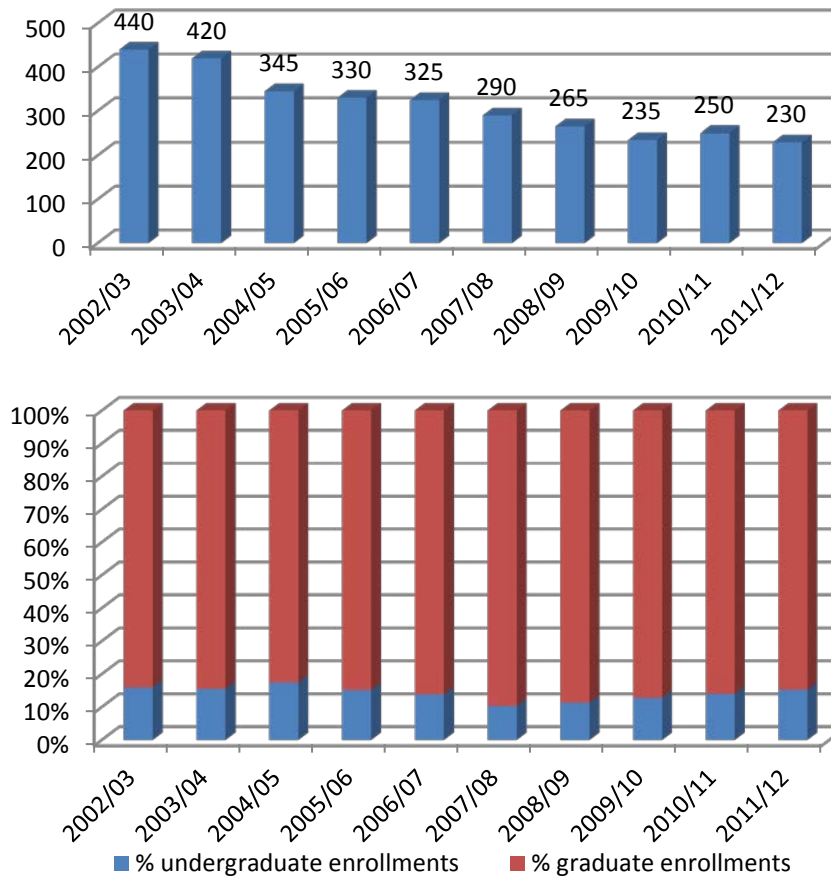
Argentina – General Information

- President Cristina Fernandez de Kirchner
- 2012 Estimated Population – 41 Million
- GDP Total - \$474 Billion
- GDP Per Capita - \$11,572 – 62nd in the world
- Considered an emerging market – one of G20 major economies
- High inflation – weakness for decades
- Manufacturing is the largest sector – half of exports in agriculture
- Largest Cities
 - Buenos Aires – 3.0 Million
 - Cordoba – 1.4 Million
 - Rosario – 1.2 Million

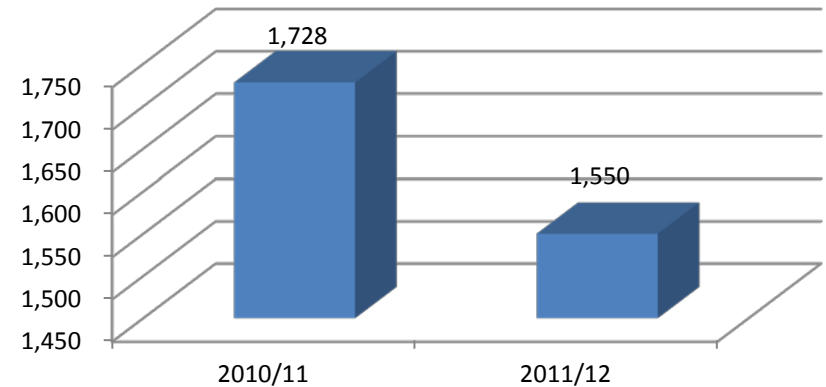


Argentinean Student Enrollment Trends

Argentinean Students in the UK



Argentinean Students in the US

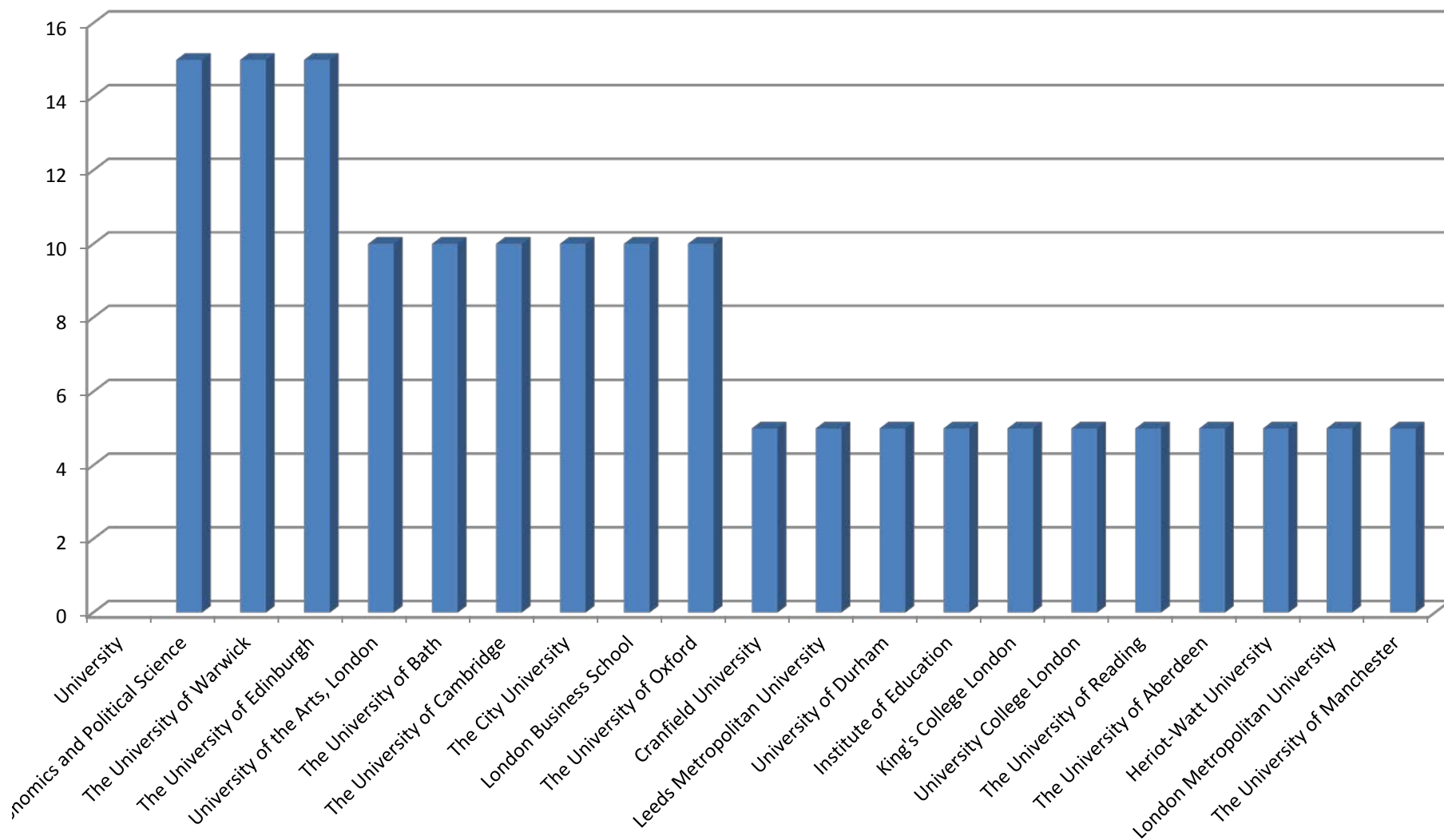


39% Undergraduate
61% Graduate

Source: HESA Student Record - ©British Council 2013

Source: IIE Open Doors Report 2012

Argentinean Student in the UK - 2012



Argentine government position on student mobility

- No specific strategies and policies to promote outgoing international student mobility
- Broad policy to internationalize higher education
- Education Ministry
 - Study in Argentina website
- Focus on integration into MERCOSUR

QS University Rankings: Latin America Top Argentinean Institutions



- #12 - Universidad de Buenos Aires
- #19 - Pontificia Univ Catolica Santa Maria de Los Buenos Aires
- #22 - Universidad Nacional de Cordoba
- #24 - Universidad Nacional de La Plata
- #25 - Universidad Austral



Argentine Institutions

- Social justice program – most institutions are tuition free
- Limited internationalization programs
- Competition with other Latin American countries in inbound recruitment
- Cutbacks in spending in the '80s and '90s

Factors affecting Argentine student recruitment

- Positive
 - Economic development has improved
 - Some study abroad programs
 - Relatively low presence of TNE
 - EU efforts to develop a common credit system with Latin America
- Negative
 - Lack of English competence
 - Lack of institutional promotion of education programs abroad
 - Lack of clear government policy strategy



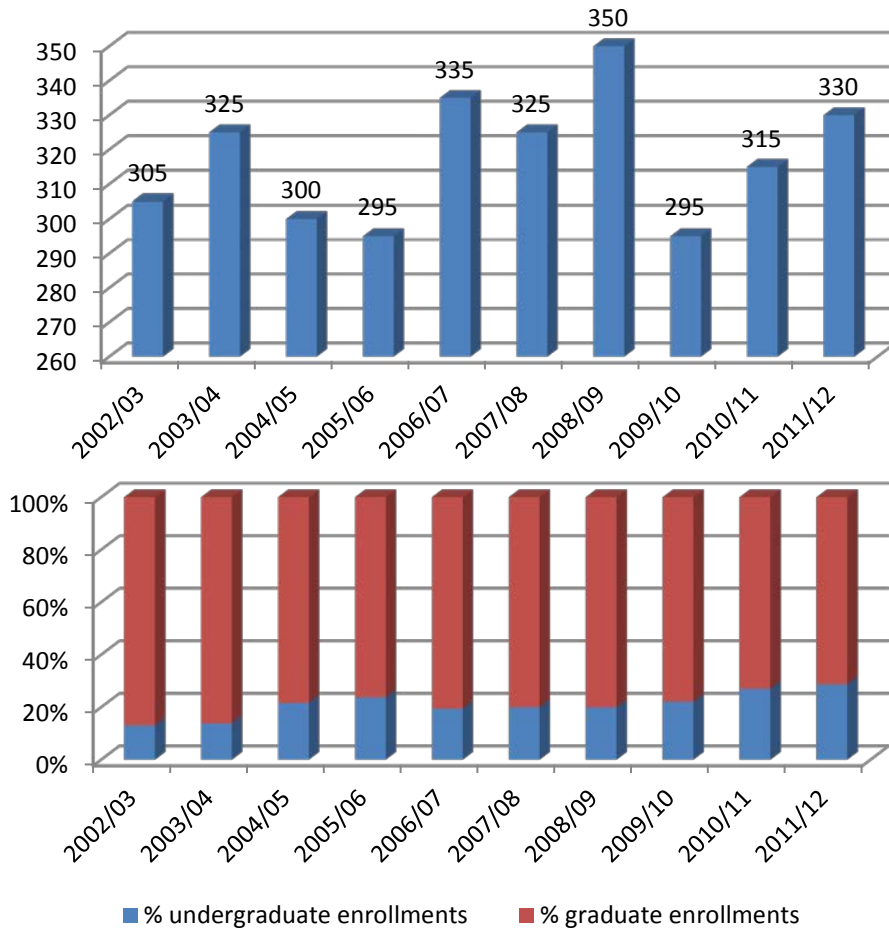
Venezuela – General Information

- President Nicolas Maduro
- Population 2011 – 29 Million
- GDP Total - \$345 Billion
- GDP Per Capita - \$11,500
- Among the most urbanized populations in Latin America
- One of world's leading exporters of oil
- Suffered during the 2008 global financial crisis but economy returned to growth as of late 2010

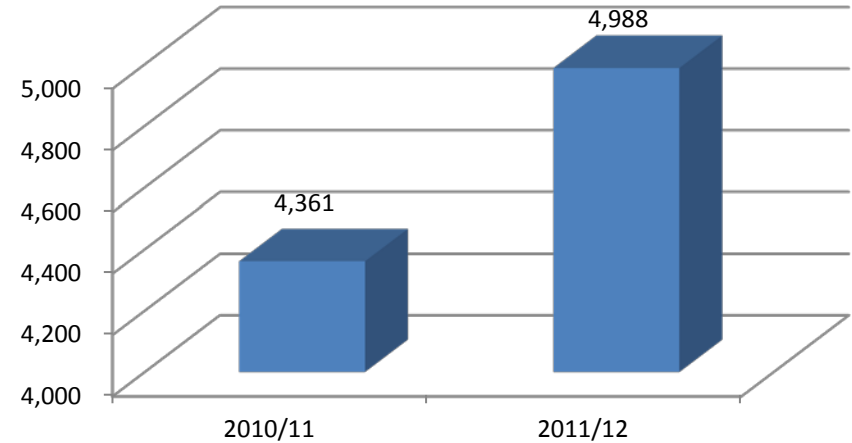


Venezuelan Student Enrollment Trends

Venezuelan Students in the UK



Venezuelan Students in the US

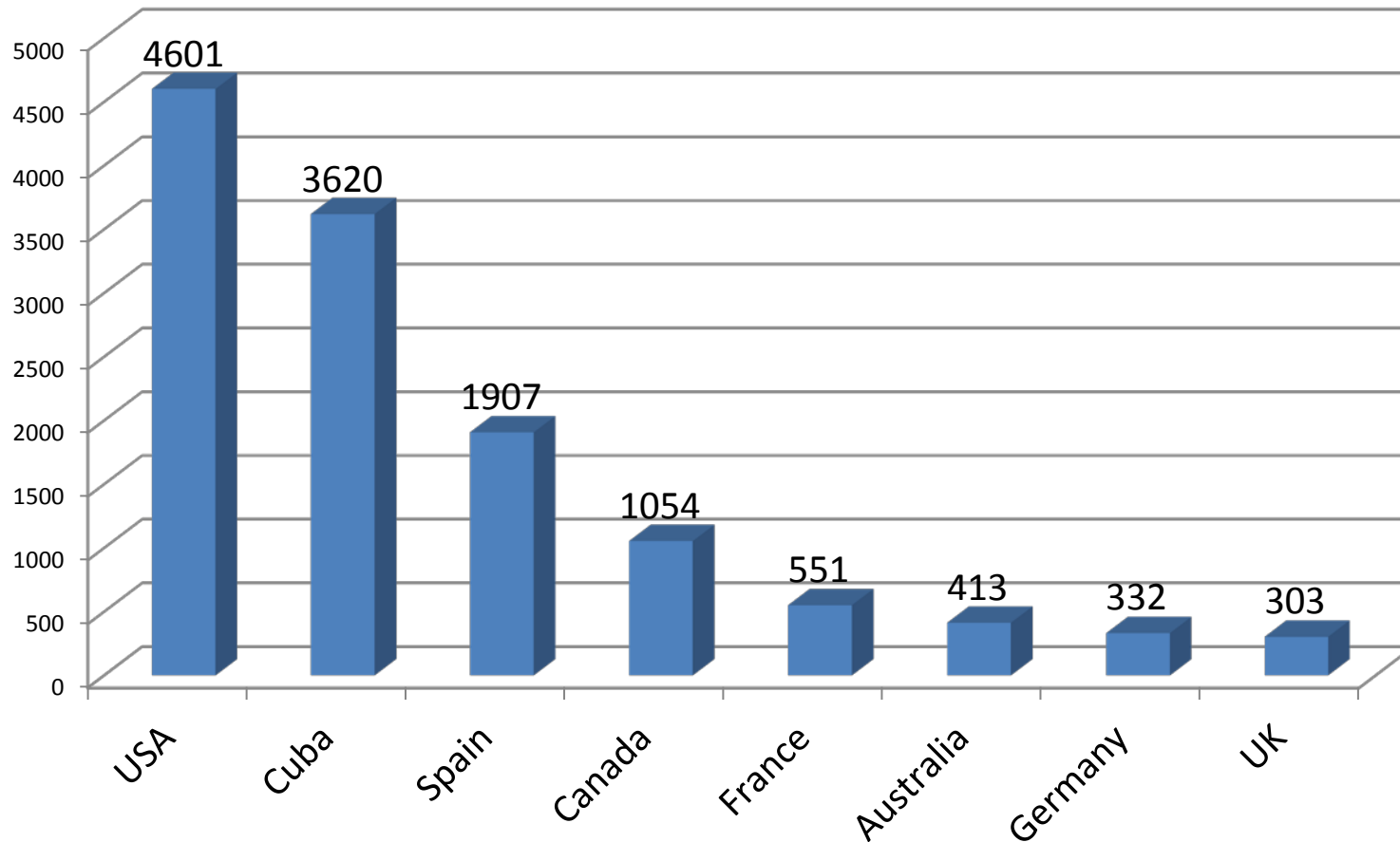


76% Undergraduate
24% Graduate

Source: IIE Open Doors Report 2012

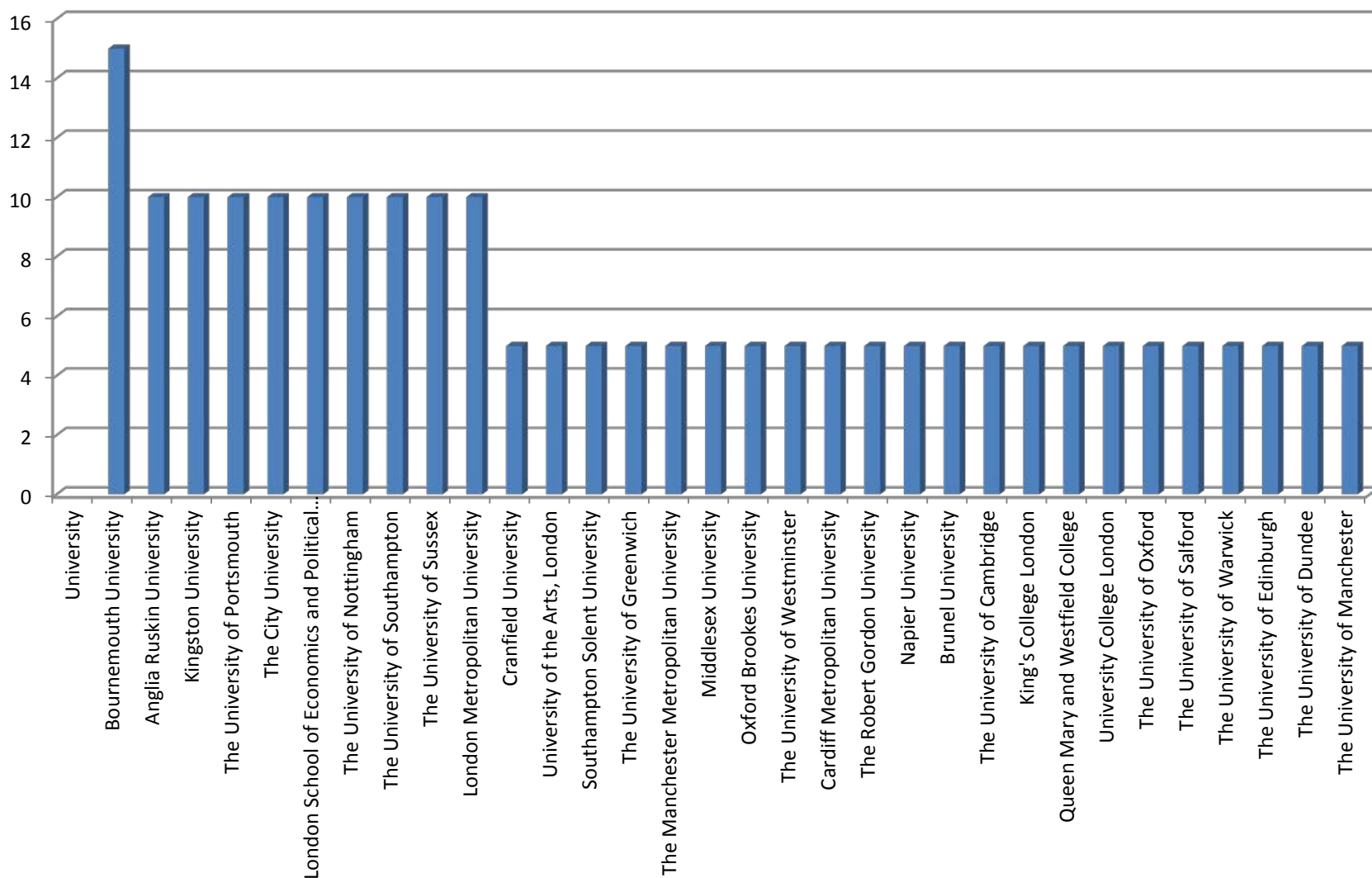
Source: HESA Student Record - ©British Council 2013

Venezuelans Studying Abroad 2011



Source: UNESCO 2011 Global Digest

Venezuelan Students in the UK - 2012



Venezuelan education funding opportunities

- FUNDAYACHUCHO
- Educational Trusts from local banks such as Banco Mercantil
- Educrédito

QS University Rankings: Latin America Top Venezuelan Institutions

- #29 - Universidad Central de Venezuela (UCV)
- #34 - Universidad Simon Bolivar Venezuela
- #63 - Universidad Catolica Andres Bello (UCAB)
- #71 - Universidad de los Andes Merida
- #162-Universidad de Carabobo



Education in Venezuela

- Administered and regulated by the Ministry of Education
- Basic education followed by specialized education
 - All public education is free but private education is popular
- Bolivarian Missions Social Outreach Program
- Bolivarian University of Venezuela
 - Goal of enrolling 1 million students nationwide
 - Social Missions Network
- Chavez's Bolivarian Curriculum

Problems faced by Autonomous Universities

- Autonomous universities now severely underfunded
- Challenges for the new leadership
- Brain drain
 - 2009 - outflow of highly skilled labor, aged 25 or older, from Venezuela to OECD countries rose 216 percent between 1990 and 2007
 - 2008 - 47 percent of 18-year-olds said they planned to emigrate in the next three years

Barriers for UK in recruiting Venezuelans

- Lack of foreign language proficiency
- Financing UK tuition
- Accessing foreign currency
 - CADIVI – Foreign Exchange Administration Commission
 - Foreign currency access limited to students studying basic sciences, engineering/ architecture and technology, agriculture and marine sciences, health sciences, education, sport sciences, social sciences or literature/the arts
 - Black market

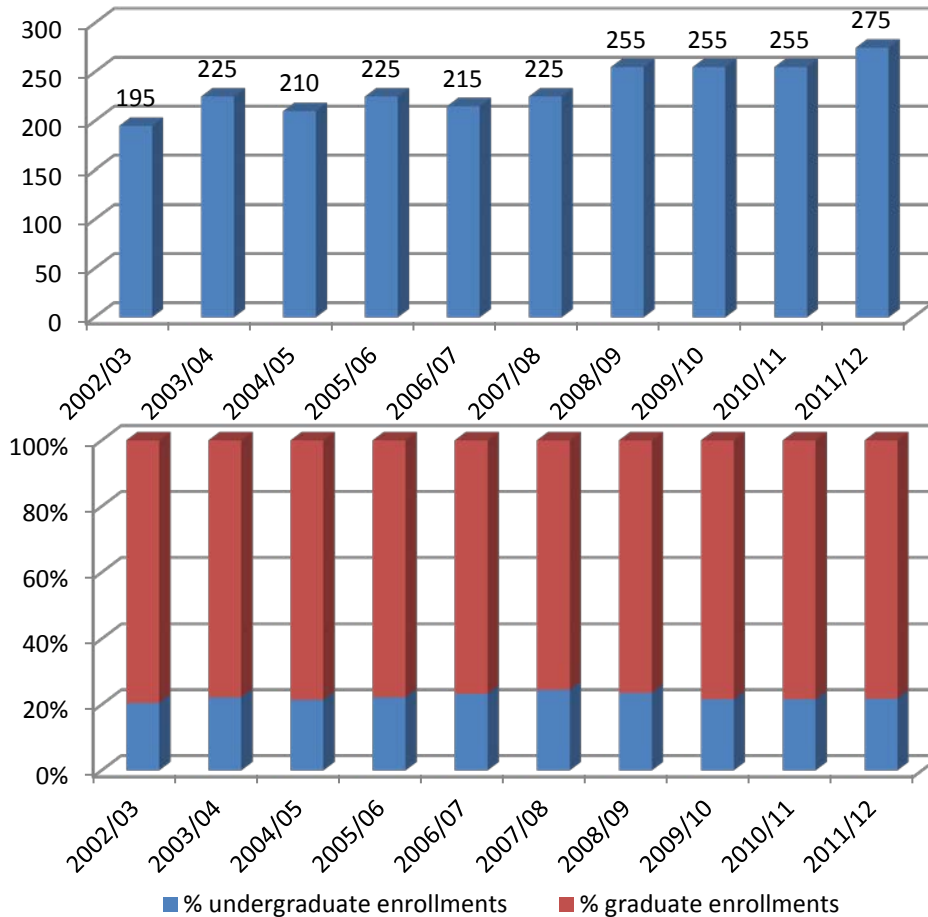
Peru – General Information

- President – Ollanta Humala
- Population 2013 Estimate – 30.4 Million
- GDP Total (nominal) - \$220 Billion
- GDP per Capita - \$7,135
- Developing country – Poverty level around 28.7%
- Economic activities include agriculture, fishing, mining, and manufacturing
- Economy of Peru - upper middle income



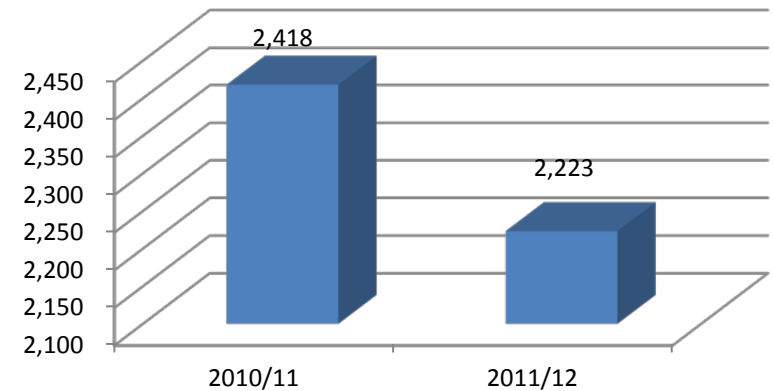
Peruvian Student Enrollment Trends

Peruvian Students in the UK



Source: HESA Student Record - ©British Council 2013

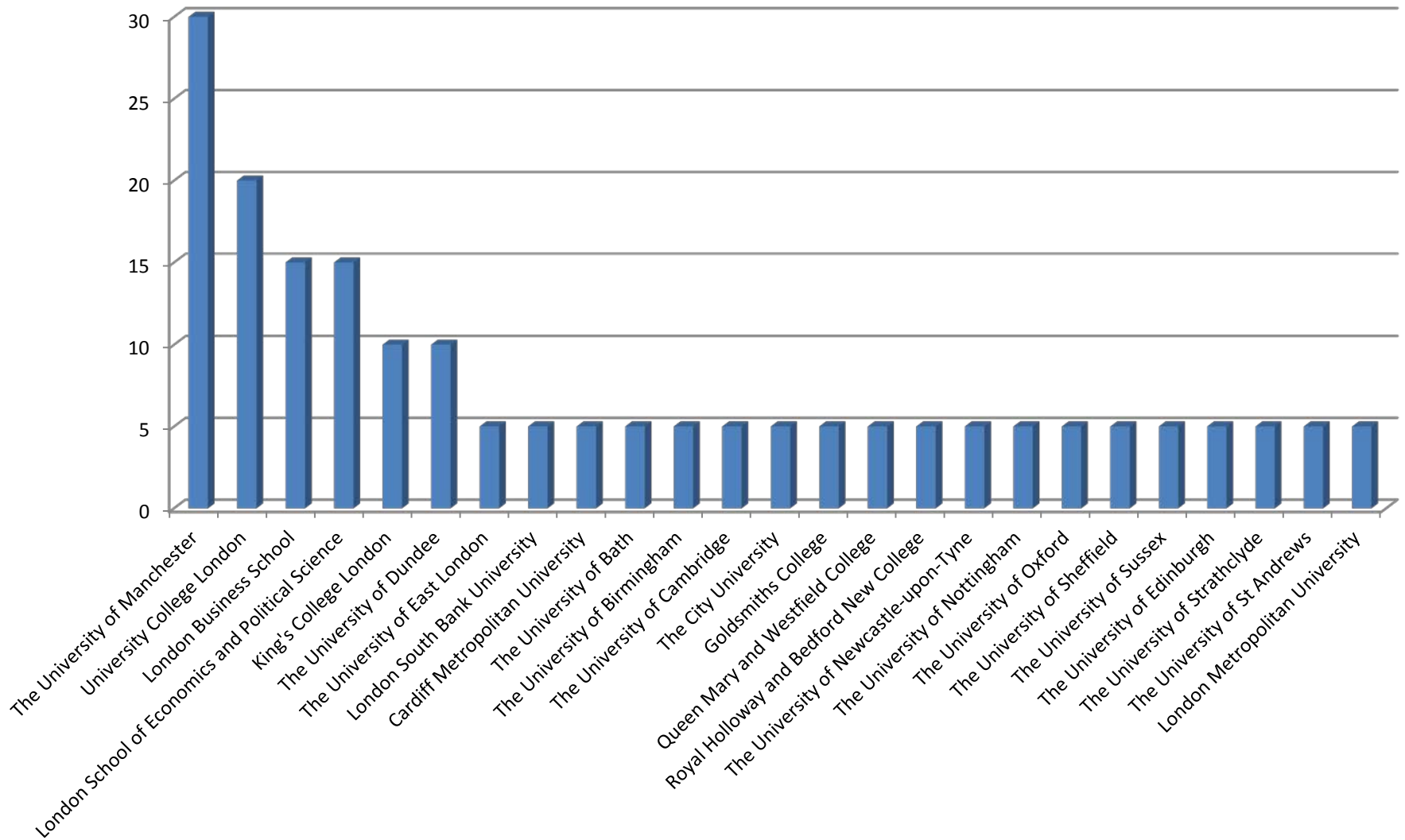
Peruvian Students in the US



53% Undergraduate
47% Graduate

Source: IIE Open Doors Report 2012

Peruvian Students in the UK - 2012



Peruvian education

- Economic stability
- Ministry of Education
- PRONABEC – National Scholarship Program – for underprivileged students in the STEM field.
 - Investment in education - mining
- Private education



QS University Rankings: Latin America Top Peruvian Institutions

- #23 - Pontificia Universidad Catolica del Peru
- #52 - Universidad Nacional Mayor de San Marcos
- #74 - Universidad Peruana Cayetano Heredia
- #111 - Universidad de Lima
- #114 - Universidad Nacional Agraria la Molina



Survey - New Exhibitions in Latin America

- **Would you be interested in attending an Education UK Exhibition in the following places in Spring 2014?**

	Yes	Interested but little budget	Maybe but need more information	No but would be interested in a smaller Roadshow	No, not interested
Venezuela (Caracas)	32.3% (30)	7.5% (7)	44.1% (41)	4.3% (4)	11.8% (11)
Chile (Santiago)	57.9% (55)	5.3% (5)	27.4% (26)	2.1% (2)	7.4% (7)
Peru (Lima)	37.2% (35)	8.5% (8)	36.2% (34)	2.1% (2)	16.0% (15)
Argentina (Buenos Aires)	33.3% (31)	6.5% (6)	41.9% (39)	2.1% (2)	16.0% (15)

Survey - New Exhibitions in Latin America

- **Are there any other countries in the Americas (North & South America and the Caribbean) in which you would be interested in attending an Education UK Exhibition or a Roadshow in Spring 2014? If so, please indicate the countries and events that you are interested in attending events below.**
 - 24 Brazil additional cities
 - 15 Mexico additional cities
 - 14 Colombia additional cities
 - 14 Ecuador
 - 8 Trinidad
 - 5 Panama
 - 5 Jamaica
 - 3 each – USA, Canada, Dominican Republic
 - 1 or 2 each – Costa Rica, Barbados, Uruguay, Cayman Islands

Mexico: Upcoming Events

- Mexico Roadshow – September 30th to October 5
- Mexico Virtual Fair – November 2013 (Details pending)
- Education UK Exhibitions – February 2013 (Exact dates pending)



Brazil: Upcoming Events

- Brazil Education UK Exhibitions and Mega-briefing – October 18 – 21 (Sao Paulo, Rio de Janeiro)
- Brazil Roadshow – Spring 2013 (Exact dates pending)



Further Discussion?

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