



SERVICES FOR INTERNATIONAL EDUCATION MARKETING CONFERENCE 2012

Focus on Canada, Colombia & the Caribbean

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Panellists

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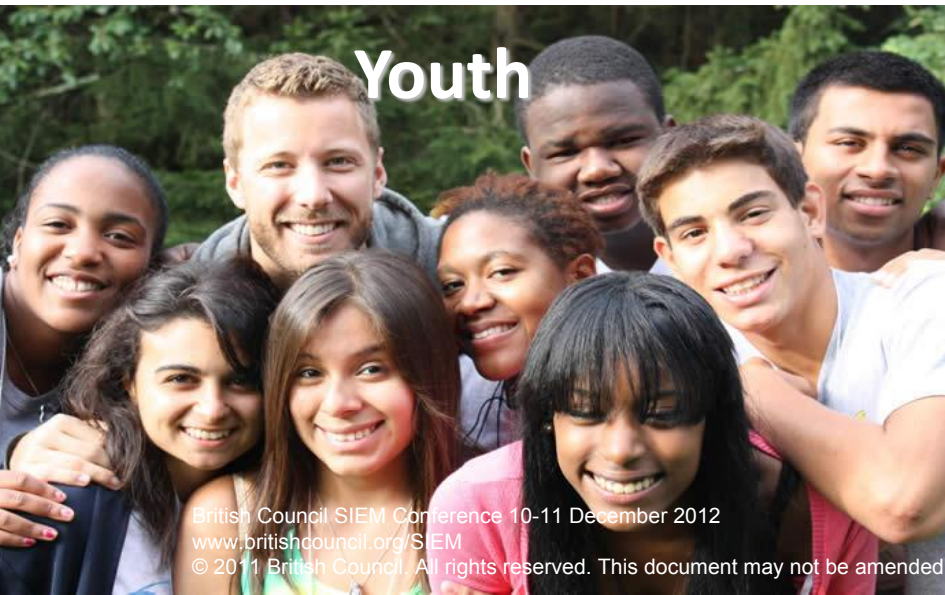
Session format

- Americas
- Focus on Canada, Colombia & the Caribbean and the opportunities these markets present for UK Higher Education.
- Panel discussion
- Q&A

What do we have in common?



A growing population

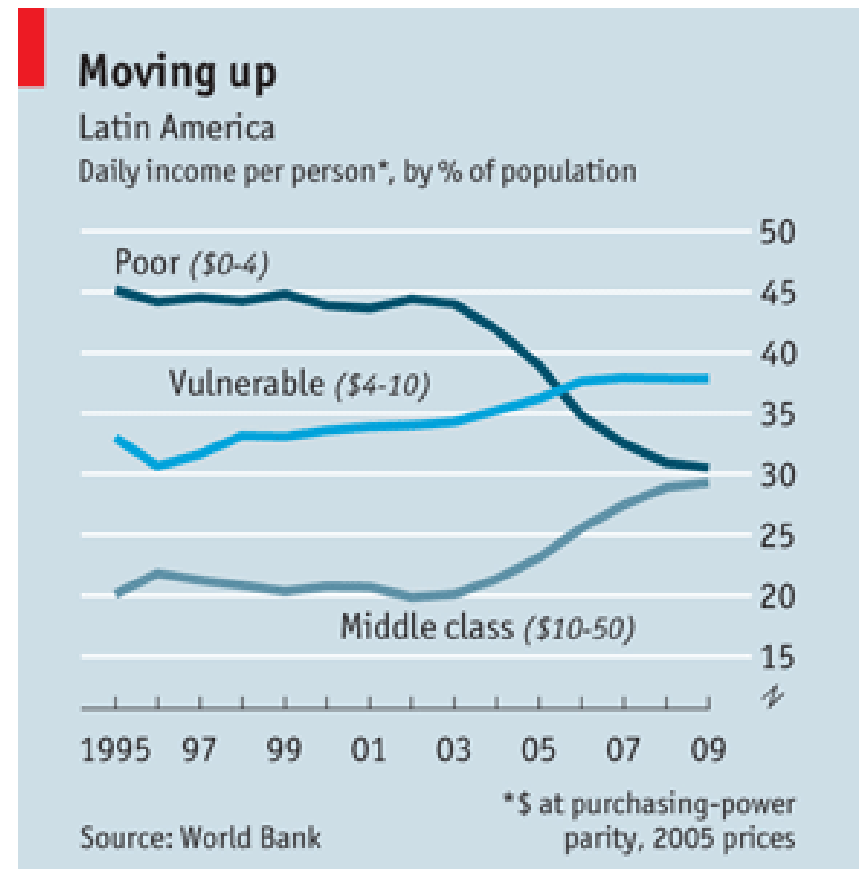


Why are the Americas important to the UK?

- c. £0.5 billion in tuition fee income alone
- 30% growth in student numbers since 2002
- Broad range of opportunity given the diversity of the markets
- US (5th) and Canada (16th) are top 20 sending countries with substantial growth potential
- Untapped potential in Latin America

Why now?

- USA, BRA, CAN, and MEX
- US-UK bilateral education
- Latin America has a GDP greater than India and Russia combined
- LatAm middle class is bigger than China's and India's together
- US and Canada are two of the UK's largest non-EU import-export partners in the world



Source: The Economist 2012

Why now?

- Increased UK presence in the region through the FCO from Calgary to Asuncion.
- More support for UK Higher Education through enlarged British Council presences in the US, Brazil and Mexico. New education teams in Canada (2012) and Colombia (2013). Expanding the service throughout the region.
- Over 40 ministerial visits from the UK to the region.

Ministerial visits (examples)

President Santos (Colombia) visit to UK, November 2011

Prime Minister visit to USA , March 2012

Prime Minister addressed Canadian Parliament in September 2011

Prime Minister visit to Mexico in June 2012

President Pena Nieto visit to UK in October, 2012

David Willets visit to Brazil, Sept 2012

David Willett upcoming visit to Colombia and Mexico, Spring 2013



Why us?



 **BRITISH
COUNCIL**

**SERVICES FOR
INTERNATIONAL
MARKETING**

AMERICAS

Canada

Canada



Canada

How many Canadians study in the UK

Level of Study	2002 /03	2003 /04	2004 /05	2005 /06	2006 /07	2007 /08	2008 /09	2009 /10	2010 /11
Postgraduate Research	1100	1150	1165	1250	1300	1330	1390	1430	1465
Postgraduate Taught	1665	1760	1885	2090	2140	2350	2340	2270	2300
First Degree	650	865	955	1105	1345	1560	1880	2155	2450
Other Undergraduate	705	670	785	795	795	835	865	870	905
Total	4115	4440	4790	5235	5575	6070	6475	6720	7120

Source: HESA Student Record

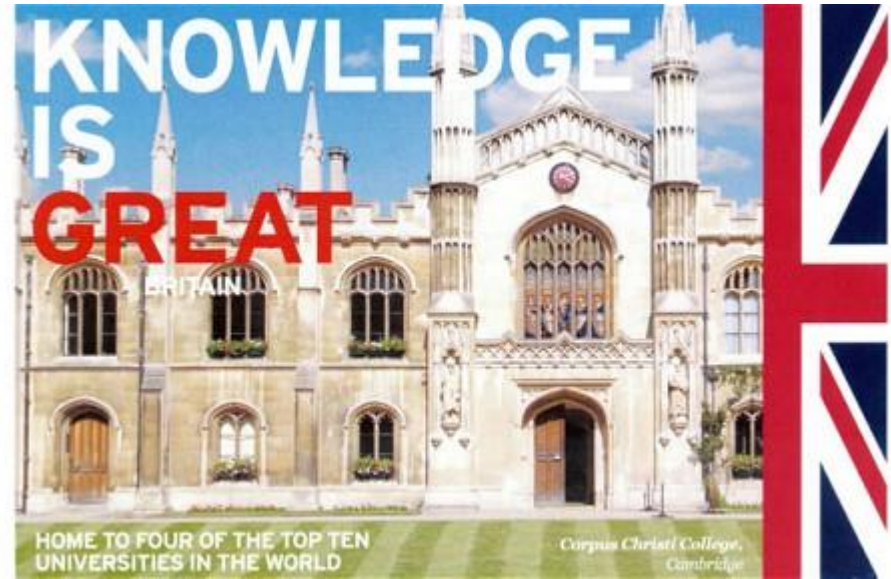
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Canada



Canada





Canada



Canada



Caribbean

The Caribbean



The Caribbean

- Presence of several offshore North American and British Universities (over 100) offering a range of Programmes - predominantly in the larger countries with about 14 offshore medical schools.

Some examples:

- University of New Orleans - Master of Business Administration (Jamaica)
- University of South Florida - Masters in Early Childhood Education, with Shortwood Teachers College, Jamaica
- Spartan School of Medical Sciences (St Lucia)
- University of London - Law (Jamaica)
- City and Guilds of London (Jamaica and Trinidad and Tobago)
- George Washington University (USA) - (Jamaica)
- Ross University of Veterinary Science - St Kitts

The Caribbean

- Decreasing state funding with attendant increase in tuition.
- One dominant 64 year old regional University with four Campuses serving 16 countries with approximately 45,000 students
- University of the West Indies - Jamaica (Mona Campus), Barbados (Cave Hill Campus), Trinidad and Tobago (St Augustine Campus), Open Campus (serving all the OECS countries)
- No common Caribbean strategy for international education - individual institutions drive international education to suit their own imperatives.

Colombia

Colombia

- An emerging market for Higher Education
- 47 million people
- Growing middle class
- Average age is 28.3 years old
- Increasingly stable security environment
- 2011: GDP growth 6%
- Expenditure on Education 3.12% GDP
- CIVETS member
- Major cities: Bogota, Medellin and Cali



Colombia

- Summer 2011: UK universities-British Council-COLCIENCIAS consortium
- Nov 2011: MOU signed during Santos visit
- May 2012: Networking mission 15 UK + 25 Colombian universities with ICETEX
- Spring 2013: David Willetts visit



Panel discussion

Government initiatives in international education Drivers and opportunities

Opportunities in the Caribbean for UKHEIs

- There is no commonly agreed Caribbean strategy for Higher Education and internationalization.
- There is a rise in off-shore University education.
- Significant opportunities for distance education programmes with recognized UK universities
- Under the GATT, education is treated as a product to be traded with its own sets of rules. The barriers to trade have been removed for signatory countries.
- The educational system in the Caribbean evolved from Britain

INTERNATIONAL EDUCATION:

A Key Driver of
Canada's Future Prosperity



Advisory Panel on Canada's
International Education Strategy

FINAL REPORT
August 2012

Canada

Canada



Our vision for Canada: become the 21st century leader in international education in order to attract top talent and prepare our citizens for the global marketplace, thereby providing key building blocks for our future prosperity.



Canada

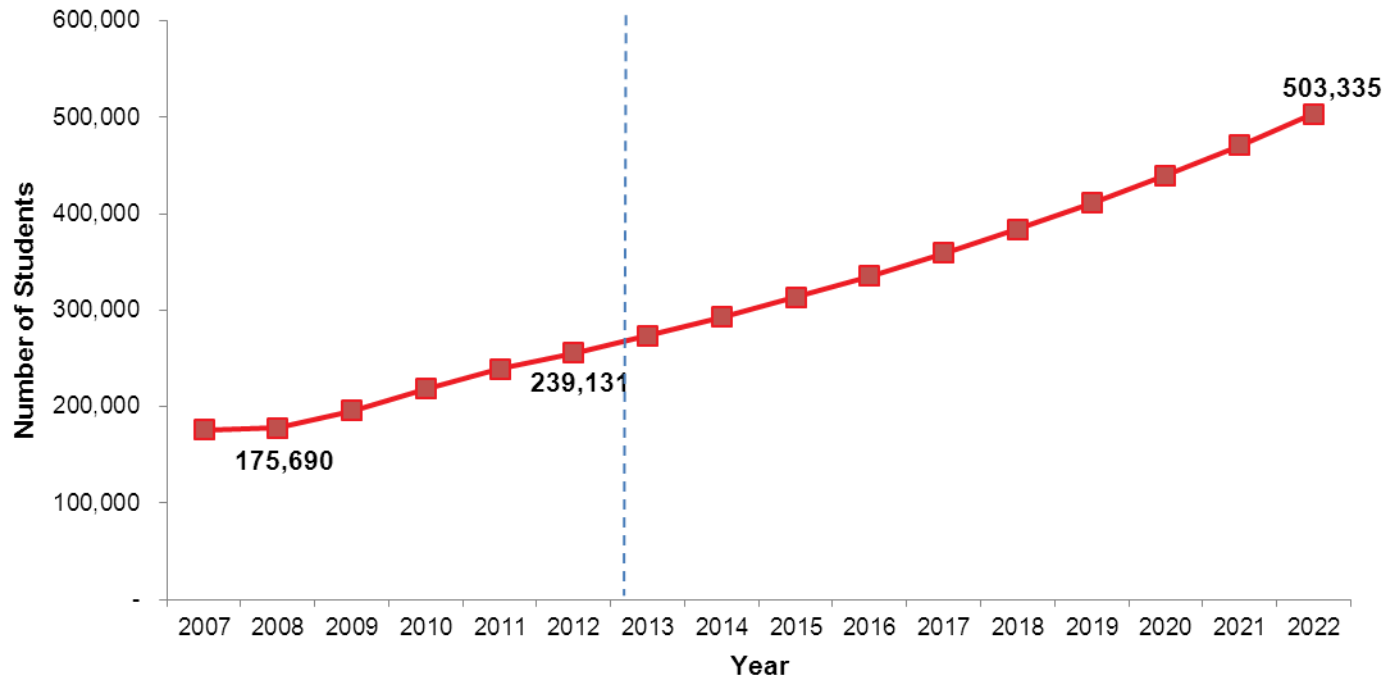
International Education Services vs. Total Exports in Goods from Canada, 2010

Area/Country	All Long Term Students	All Exports in Goods	Educational Services as % of All Goods Exports
China	\$1,836,427,000	\$13,232,891,000	13.9%
Korea	\$707,402,000	\$3,709,307,000	19.1%
India	\$583,588,000	\$2,088,683,000	27.9%
Saudi Arabia	\$427,662,000	\$977,758,000	43.7%
USA	\$369,131,000	\$299,068,000,000	0.1%
France	\$333,539,000	\$2,349,565,000	14.2%
Japan	\$180,728,000	\$9,194,118,000	2.0%
Mexico	\$125,380,000	\$5,009,864,000	2.5%
Hong Kong	\$121,451,000	\$1,897,603,000	6.4%
Taiwan	\$101,466,000	\$1,289,112,000	7.9%
Top 10 Areas	\$4,786,774,000	\$338,816,901,000	1.4%
All Countries	\$6,921,769,000	\$399,434,000,000	1.7%

Source: Estimates from Roslyn Kunin and Associates, Inc. Estimates based on DFAIT data

Canada

Long-Term International Students in Canada (Seven percent annual growth scenario)

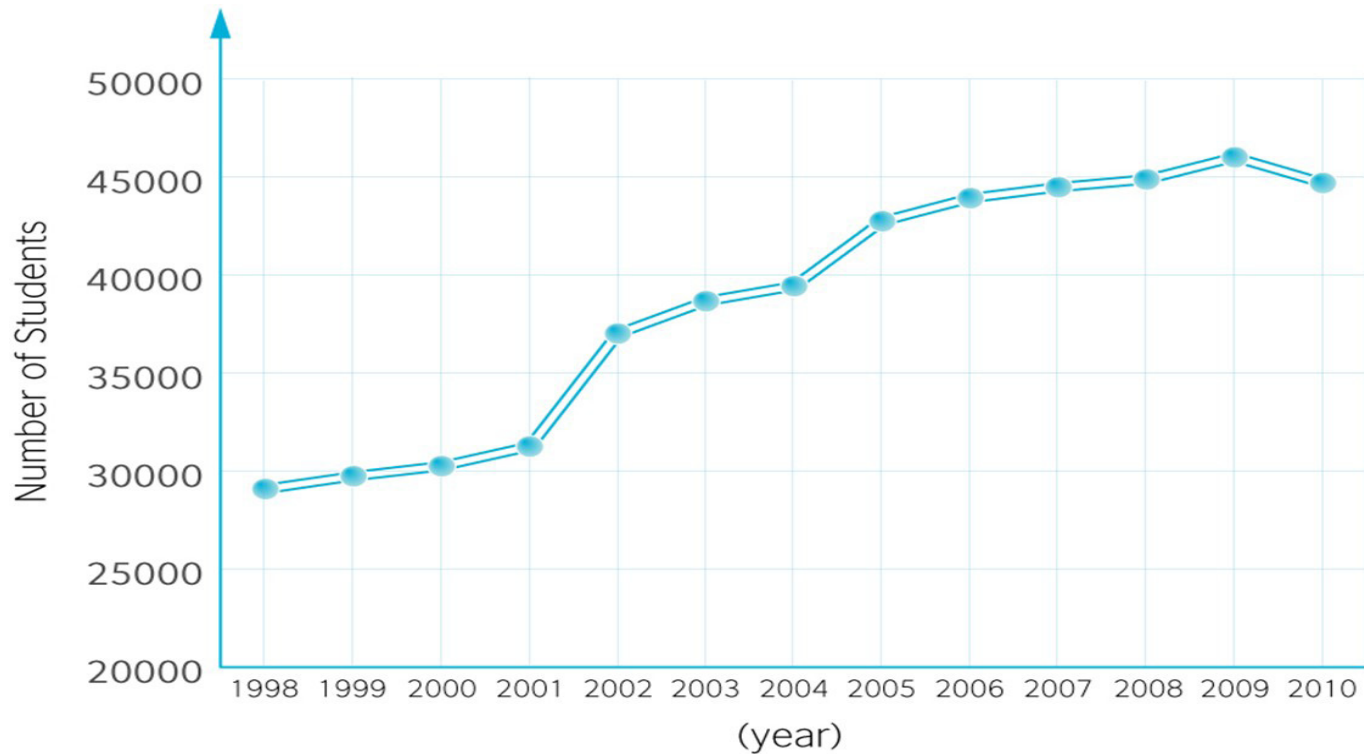


Ambition:

- Double international student enrolment by 2022.
- Contribute up to \$16 billion to Canada's economy.
- Encourage top talent to immigrate.

Canada

How many Canadians study abroad?



Source: UNESCO

Colombia

- Increasing research capacity is the major government priority
- Colombia looks to the UK for expertise in designing long-term policy frameworks on Science and Innovation.
- Increasing commercial output of science
- Developing commercial partnerships particularly in biotech, nanotech and health.
- \$5bn allocated to support this work
- COLFUTURO and ICETEX funding programmes

Panel discussion

International priorities for university Vice Chancellors in Canada, the Caribbean and Colombia

Canada



Canada



Canada



Colombia

Priority is increasing Colombia's research capacity and quality:

- Mobility of staff: ICETEX faculty exchange programme with a focus on areas aligned to Science, Innovation, Technology etc.
- Short term research assistantships

Progression partnerships

Government supported initiative increasing the number of international students (e.g. British!) learning Spanish.

Panel discussion

What are the barriers to success?
What is the competition?

Caribbean - Funding

Open Scholarship & Sports Scholarships for undergraduate study (UWI)

IMAGINE EDUCATION CANADA - www.educationau-incanada.ca

EMERGING LEADERS OF THE AMERICAS PROGRAMME (ELAP)

<http://www.scholarships-bourses.gc.ca/scholarships-bourses>

CANADA-CARICOM www.scholarships-bourses.gc.ca/scholarships-bourses

EUROPE - ERASMUS MUNDUS – Mundus ACP Project

http://mundusacp.up.pt/?show=general_information

CARIBBEAN AND PACIFIC ISLANDS MOBILITY SCHEME (CARPIMS) –
INTRA ACP MOBILITY

www2.sta.uwi.edu/carpims/?show=general_information

Caribbean - Funding

LINNAEUS-PALME

<http://www.scholarshipportal.eu/students/browse/scholarship/80/linnaeus-palme.html>

EDUCATION USA <http://educationusa.state.gov>

AUSTRALIAN DEVELOPMENT SCHOLARSHIPS

www.aisaid.gov.au/australia-awards/pages/studyin.aspx

Decreasing value of local currencies against the British Pound and hence the cost of supporting study in the UK

- In Jamaica the exchange rate is GBP1.00 ~ J\$135.00
- For the Eastern Caribbean approximately GBP1.00 ~ EC\$4.00

Caribbean - Competition

What does competition look like?

The University of the West Indies

St Georges University (particularly for Medical training)

The USA brand:

US off-shore universities right across the Caribbean (offering employment in the US for one year after completion) as well as opportunity to study in the USA under 4-year programmes with significant financial aid.

Colombia

- Stronger positioning of the UK offer needed, e.g. EducationUK brand
- English language barriers
- Visa challenges requiring additional support
- Financial and corruption concerns

Canada



Q&A

Questions!

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British Council Canada

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