

INTERNATIONAL EDUCATION:

A Key Driver of
Canada's Future Prosperity



Advisory Panel on Canada's
International Education Strategy

FINAL REPORT
August 2012

© Her Majesty the Queen in Right of Canada, represented by the Minister of International Trade, 2012.

Permission to Reproduce

Except as otherwise specifically noted, the information in this publication may be reproduced, in part or in whole and by any means, without charge or further permission from Foreign Affairs and International Trade Canada, provided that due diligence is exercised in ensuring the accuracy of the information reproduced; that Foreign Affairs and International Trade Canada is identified as the source institution; and that the reproduction is not represented as an official version of the information reproduced, nor as having been made in affiliation with, or with the endorsement of, Foreign Affairs and International Trade Canada.

Opinions and statements in the publication attributed to named authors do not necessarily reflect the policy of Foreign Affairs and International Trade Canada or the Government of Canada.

Cat. No. FR5-64/2012E-PDF

ISBN 978-1-100-21092-6

Aussi offert en français sous le titre *L'éducation internationale : un moteur-clé de la prospérité future du Canada.*

International Education: A Key Driver of Canada's Future Prosperity



Advisory Panel on Canada's
International Education Strategy

Message from the Advisory Panel

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.

We were honoured to accept the invitation to serve on the Advisory Panel on Canada's International Education Strategy. Early on, we recognized the complexity of international education and the multitude of partners and stakeholders already engaged in various international initiatives.

Our mandate afforded us the opportunity to reach out to provincial/territorial partners and to stakeholders in order to get a good understanding of the current situation prior to being able to chart the course for the future. Our engagement process allowed us to get a real sense of the high-quality education offerings throughout the sector, from K-12 through PhD. For far too long, Canadian institutions have been a well-kept secret, perhaps because we have been too modest. The time is right to coordinate our efforts to showcase our greatest assets: the quality and diversity of our education offering. The time to do so is now, as we face strong international competition to attract top talent. Our key competitors are expanding their marketing and attraction efforts. Their greater brand recognition and financial clout will have a severe impact on our success in attracting top talent if we do not make a committed effort now to effectively market Canada.

We asked ourselves these questions: does the world know about Canada's quality, world-class institutions? Are the best and brightest students thinking of Canada as they plan their future? Our recommendations for the international education strategy are mindful of addressing these concerns and ensuring that Canada raises its international mind share. Raising mind share is the cornerstone to growing our education market share.

Why does this strategy matter at this juncture? Canada needs top talent. Top talent fuels innovation, and innovation drives economic prosperity. Top talent has the power to propel a society forward. Top talent drives the virtuous circle that can help redress our current and future demographic imbalances. If Canada wants to maintain its current standing, Canada must position itself to attract top talent.

This report will examine the direction we need to take to be the country we can be for our citizens and for the world. We have an opportunity to share our values of democracy, diversity, bilingualism and equality with the world. We have an opening to do good in the world. However, we are facing a narrow window of opportunity that requires us to coordinate our collective efforts in order to fully seize this opportunity.

How we reached our recommendations

As part of the engagement process, the advisory panel, supported by Foreign Affairs and International Trade Canada, held online consultations (receiving 143 submissions) and seven regional cross-Canada round tables (meeting with 138 participants) in November and December 2011. Our engagement process culminated with a collaboratory in January 2012, where provincial partners and stakeholders came together to reach a consensus on the priorities for our recommendations.

We recognize the jurisdiction of the provinces/territories in education: we met with or spoke to senior officials from all provincial ministries of education active in international education to ensure alignment and reduce duplication of efforts. Education associations and institutions from K-12 through post-doctoral programs were consulted and remained dynamic sounding boards throughout our process.

Our engagement process confirmed that Canada has the opportunity and capacity for strong growth in attracting international students. It is feasible to double the number of international students by 2022 while maintaining high-quality standards. Further, it is imperative that we actively seek co-operative arrangements to encourage Canadian students to spend time abroad either in a study, internship or service learning experience.

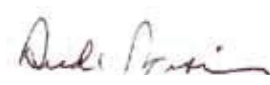
We thank all who have contributed to this engagement process. We believe success will come from leveraging our strengths and from all working together in a coherent and cohesive way. Collaboration will ensure that we are taking full advantage of the opportunities in international education not only for Canada, but also to impart Canadian values in the world.

Our work was superbly supported by some of Canada's finest civil servants from Foreign Affairs and International Trade Canada and Citizenship and Immigration Canada. Without their efforts, we could not have accomplished our task in the limited timeframe. We cannot thank them enough for their dedication to this project.

Canada's quality education offerings can no longer be a well-kept secret.
Canada is the place to be for top talent.



Amit Chakma (Chair)
President and Vice-Chancellor
Western University



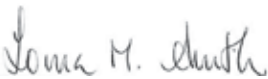
André Bisson
Chair of the Board, Centre for Interuniversity
Research and Analysis of Organizations;
Lead director, Transat A.T.; and
Chancellor Emeritus, Université de Montréal



Jacynthe Côté
President and CEO
Rio Tinto Alcan



Colin Dodds
President and Vice-Chancellor
Saint Mary's University



Lorna Smith
Director, Office of International Education
Mount Royal University



Don Wright
President
British Columbia Institute of Technology

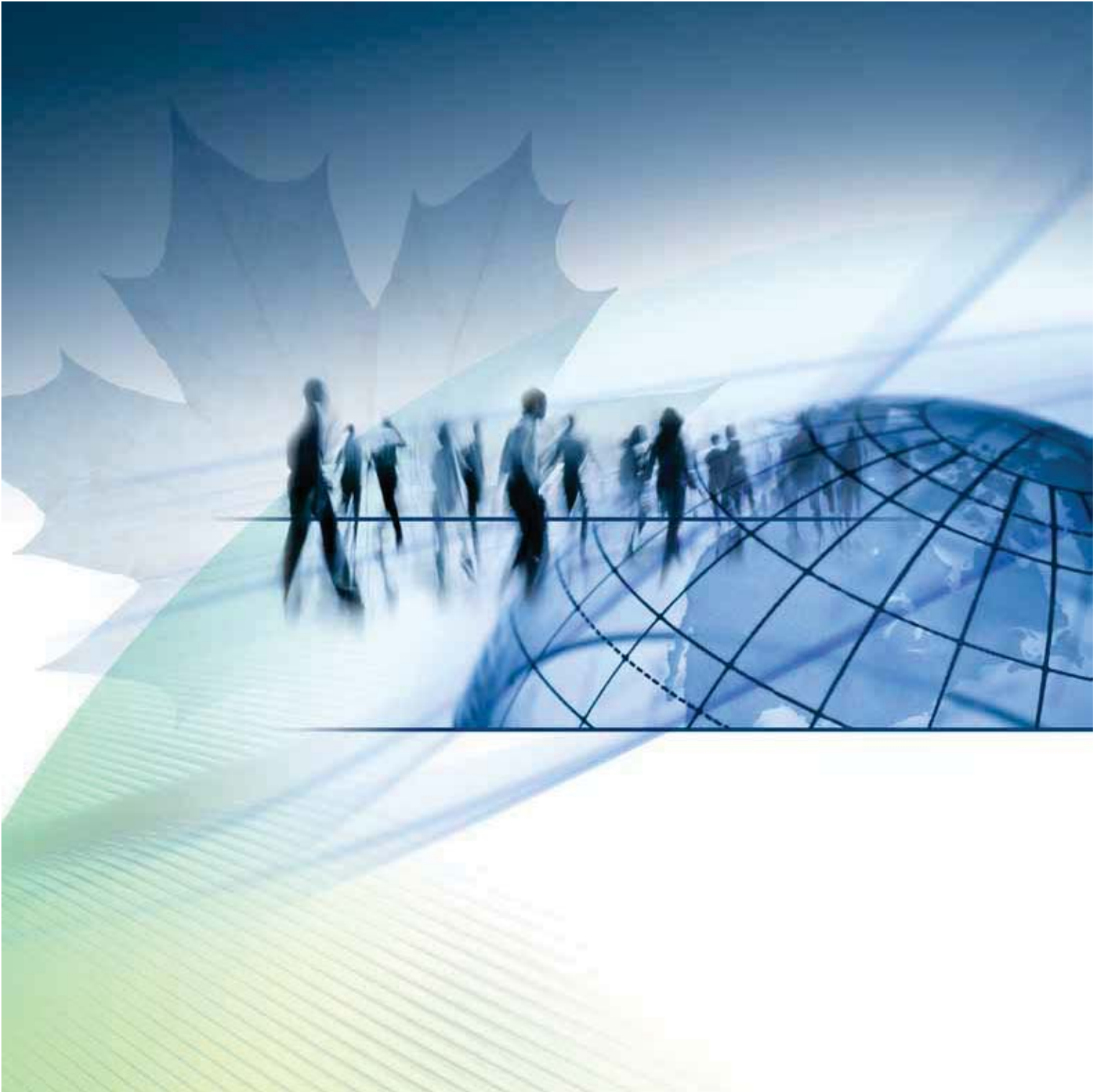
Table of Contents

Message from the Advisory Panel	i
Executive Summary	vii
Chapter 1: Mandate of the Advisory Panel	1
1.1 Guiding principles	1
1.2 Our vision for Canada	1
1.3 Process	2
1.3.1 Online consultations	2
1.3.2 Regional round tables	2
1.3.3 National collaboratory	3
1.3.4 Group discussions	3
1.3.5 Benchmarking mission	4
1.4 Research papers	4
1.4.1 Economic impact of international education in Canada—an update	4
1.4.2 Canada’s capacity for international student enrolment	4
1.5 Our value proposition: consistent quality at a reasonable cost	5
1.6 Parameters for the work of the panel	5
Chapter 2: Why International Education Matters	6
2.1 Supporting Canada’s innovation, science and technology agendas	7
2.2 Internationalization and the “diplomacy of knowledge”	9
2.3 Economic impact of international education	10
2.4 Pipeline to the Canadian labour market	12
Chapter 3: Context for Our Recommendations	14
3.1 Importance of provincial/territorial jurisdiction	14
3.2 Contributions of the federal government	15
3.2.1 Foreign Affairs and International Trade Canada	15
3.2.2 Other government departments and agencies with a role in international education	17

3.3 Current contributions of all partners and stakeholders	19
3.3.1 Provinces/territories	19
3.3.2 Education associations	21
3.3.3 Education institutions	22
3.3.4 Private-sector and individual contributions	25
3.4 Dovetailing with previous expert panels	26
3.5 Environmental scan: The international education landscape	26
3.5.1 United States	27
3.5.2 United Kingdom	28
3.5.3 Australia	28
3.5.4 Germany	29
3.5.5 France	29
3.5.6 New Zealand	30
3.5.7 Malaysia	30
Chapter 4: Themes for the Recommendations	31
Chapter 5: Targets for Success	32
5.1 International student enrolment	32
5.2 International mobility for Canadian students	35
Chapter 6: Policy Coordination and Ensuring Sustainable Quality	38
6.1 Internationalization as a priority	38
6.2 Policy coordination	39
6.2.1 Coordination of the international education strategy	40
6.2.2 Coordination mechanisms	41
6.3 Ensuring sustainable quality	43
Chapter 7: Promotion of “Education in Canada”	45
7.1 Priority markets	45
7.2 Marketing Canada’s brand	48
7.3 Digital strategy	53
Chapter 8: Investments	57
8.1 Scholarships for international undergraduate students	57
8.2 Research grants and scholarships	58
8.3 Bilateral agreements	60

Chapter 9: Infrastructure and Support	63
9.1 Study permit processing	63
9.2 Training for international education representatives	66
9.3 Canadian Experience Class	69
Chapter 10: Spirit of Engagement	71
10.1 Setting out the contributions of all partners	71
10.1.1 Government of Canada	71
10.1.2 Provincial/territorial governments and CMEC	72
10.1.3 Education associations	72
10.1.4 Institutions	74
10.1.5 Industry	75
Chapter 11: Conclusion	76
Annex A: Research that Informed Our Recommendations	77
Annex B: Biographies of Panel Members	81
Annex C: Competitor Metrics and Practices	83
Annex D: Stakeholders in the Canadian Education Community	85
Annex E: Conceptualizing a Digital Strategy	89
Endnotes	91
References	95

Executive Summary



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.

International education is a key driver of Canada's future prosperity, particularly in the areas of innovation, trade, human capital development and the labour market. In recognition of this value, the Government of Canada named an advisory panel to provide guidance and direction for the development, implementation and evaluation of an international education strategy for Canada.

We, the Advisory Panel on Canada's International Education Strategy, believe that international education in all its facets brings tremendous value to every community in Canada, whether urban or rural, eastern or western, francophone or anglophone. This report seeks to outline the benefits that international education brings to Canada and presents recommendations for an international education strategy that can align with federal policies related to prosperity and innovation, as well as complement provincial/territorial policies.

In a knowledge-driven economy, Canada needs to educate highly qualified and skilled people who can then take their place among the best and the brightest in the world. The internationalization of Canada's education and research institutions through international partnerships and exchange of talent is thus of substantial importance to supporting Canada's science and technology (S & T) and innovation agendas. We view internationalization—the process of bringing an international dimension into the teaching, research and service activities of Canadian institutions—as the first benefit to Canada.ⁱ

Second, international education allows current and future generations of Canadians to acquire a global perspective, thus helping them to become citizens of the world who can contribute to the “diplomacy of knowledge”.ⁱⁱ In an increasingly integrated world, and in light of Canada's own growing engagement in trade/investment and geopolitical affairs, providing Canadian students with a global perspective is of great strategic importance.

Third, the near-term economic impact is significant to Canada's national and regional economies as we strategically diversify our exports by sector and by region. With the alumni networks established through those international studentsⁱⁱⁱ who return to their home countries, Canada gains advocates who can assist in opening doors to foreign partners.

Fourth, an international education strategy that is well aligned with our immigration and labour market strategies can help Canada in addressing demographic and labour market issues.

Fifth, we must recognize the immediate benefits of international education for Canada, which span economic growth, job creation, and increased exports and investment. These benefits are distributed across all of Canada, from coast to coast to coast.

i Adapted from the Association of Universities and Colleges of Canada definition of “internationalization”.

ii Inspired by the Governor General, His Excellency the Right Honourable David Johnston, who defined the diplomacy of knowledge as “our ability and willingness to work together and share the knowledge we uncover and refine across disciplines and across borders to improve the human condition together” (from the Opening Address to the Conference of the Americas on International Education in Rio de Janeiro, Brazil, April 26, 2012).

iii It is worth noting that throughout this report, the term “international students” will be used to reference students who left their country of origin and moved to another country to study. In counter distinction, the term “foreign students” is often used in literature in this field, but it has a broader use as it refers to students who are not citizens of the country in which they are studying and can, therefore, include permanent residents.

A bold long-term strategy is required so that these and other benefits can be realized. Fortunately, many of the foundational pieces are in place. Many of our provinces and territories have already taken a leadership role in international education, including British Columbia, which has just released its "[International Education Strategy](#)". All components of our education sectors—ranging from language schools, K-12 to post-secondary education (colleges, polytechnics, Cegeps and universities)—have been active in the international arena, as have many professional associations. We already have a strong base to build on and the panel welcomes the increasingly active role the federal government has taken in promoting Canadian education internationally, including recognizing education as a key pillar of Canada's bilateral relations with key countries.

Canada now needs to take the next steps. The opportunities are immense and ready for a sustained Canadian response. The Organisation for Economic Co-operation and Development (OECD) estimates that the global demand for international higher education is set to grow from nearly 3.7 million students (in 2009) to 6.4 million in 2025. On top of this is a huge market potential in high school students. The K-12 sector can make a significant contribution, as the students who attend these schools can decide to pursue post-secondary education in Canada. Further, international students at the K-12 level can shape internationalization by bringing a diversity of experience to the classroom. The more Canadian students are exposed to an internationalized curriculum and intercultural experiences at an early age, the greater the impact on their development.

Most of the growth will come from developing and emerging countries as they recognize the importance of an educated and intercultural population that is the driver for economic prosperity and social progress. What is required is a strategy that develops partnerships, including with the private sector, and brings coordination of our various initiatives and a commitment to make strategic investments. This will strengthen Canada's engagement with these emerging economies and ensure greater collaboration between institutions in Canada and abroad.

We believe that a clear long-term strategy will ensure that Canada maintains and increases its market share of the best and brightest international students and researchers, fosters opportunities for Canadians to study abroad and enables Canadian citizens to be more fully engaged in an understanding of the diversity and multicultural nature of the world in which we live.

Our specific goal is to double the number of quality international students within 10 years, from 239,000 today, with a focus on attracting top talent who will either decide to make Canada their home or return to their home countries as leaders of the future. We believe that this goal allows us to focus on sustaining the quality of our education systems while at the same time attracting those students who meet our high standards.

Attracting top talent also requires a competitive scholarship environment. Although Canada has invested substantially in graduate and post-doctoral scholarships, not enough of them support international students. Only 25 percent of the Vanier Canada Graduate Scholarships (Vanier CGS) and 31 percent of the Banting Postdoctoral Fellowships were awarded to international students in 2011–2012. Many of the awards funded under the Canada Graduate Scholarships Program are not open to international students. In comparison, Australia has just increased its graduate scholarships to 10,000, and the United States is estimated to have 100,000 scholarships. In both cases, the majority are available to international students.

The panel is committed to the concept that the international education strategy should uphold and illuminate Canada's brand of quality and excellence. Additionally, we are of the opinion that such a strategy will align with other important national strategies (such as Canada's S & T strategy, a revamped immigration strategy and a labour market strategy) and complement existing and future comprehensive economic and trade agreements.

The panel believes that Canada has a competitive advantage over many other countries, including Australia, New Zealand, the United States and the United Kingdom. The time to act is now so that Canada's full potential in international education can be fully realized.

Why international education matters: A driver of the Canadian economy

A 2011 report commissioned by Foreign Affairs and International Canada (DFAIT) indicated that in 2010, international students in Canada spent in excess of \$7.7 billion on tuition, accommodation and discretionary spending (up from \$6.5 billion in 2008). More than \$6.9 billion of this revenue was generated by the 218,200 long-term international students in Canada. In addition, short-term (staying for less than six months) language students contributed \$788 million to the Canadian economy. When accounting for additional tourism benefits from international students, the report finds that the expenditure resulting from international students in 2010 was \$8.0 billion, which translates to 86,570 jobs and \$455 million in government tax revenue.

In addition, there is tremendous scope for economic contributions from the direct export of Canadian education services abroad. Canadian schools, colleges, polytechnics and universities generate millions of dollars in tuition revenue from programs of study offered abroad. For instance, education services are now Canada's 11th largest export, and its single largest export to China. The spending of international students in Canada is greater than Canada's export of unwrought aluminum, and even greater than the export value of helicopters, airplanes and spacecraft.

The education sector is a future economic growth sector that brings economic benefits to every region of Canada from coast to coast to coast and to communities large and small. Educating international students in Canada also has the potential for a significant impact on Canada's future trade and foreign policy relationships in foreign countries. Likewise, the strategy should ensure that Canadian students have the opportunity to add value to their quality Canadian education with the opportunity for an international exchange or internship. Recruitment and retention of international talent is an essential and increasingly important component of building a modern society and an innovation economy.

International education: A pipeline to the Canadian labour market

Numerous studies warn that Canada will suffer a severe shortage of skilled labour within as little as a decade. Canada's talent shortfall will span all occupations: managerial, professional, technical and skilled trades, as well as highly accomplished researchers and scientists. The demographic pressure of an aging workforce will affect occupations in all sectors. In some domains, Canada is already being challenged by talent shortages.

Seventy-five percent of Canada's workforce growth now comes from immigration. It is expected to reach 100 percent by the end of the decade. International recruitment strategies targeting both the quantity and quality of talent are needed to address Canada's future shortfalls in the human capital necessary for building a world-class knowledge economy. International students provide an excellent source of highly qualified and skilled persons to meet our current and future labour market needs, although Canada faces strong global competition with industrialized countries to attract the same pool of young international talent.

International students choosing to remain in Canada after their studies constitute a desirable source of qualified immigrants who are capable of integrating well into Canadian economy and society. Those who return to their home country will become allies with Canada by fostering successful commercial and political relations, given their understanding of Canadian values and society.

Our value proposition: Consistent quality at a reasonable cost

Canada's brand is based on consistently high quality and a reputation for excellence across the entire education sector. Canada offers international students a safe and multicultural learning environment in which they can choose to study in English or French. Compared to other countries such as the United Kingdom or the United States, Canadian tuition fees and the cost of living are quite affordable. Further, international students have the option to work during their studies and can also apply to work in Canada upon completion of their studies.

Given the growth in global demand for international education and challenges being experienced by some of our main competitors (Australia, New Zealand, the United Kingdom and the United States), Canada is well positioned to capitalize on this window of opportunity with the value proposition of consistently high quality at a reasonable cost. We firmly believe that maintaining high quality is paramount.

Currently, this value proposition is reinforced by the co-managed *Imagine Education au/in Canada* global brand and Canada's visa approval processes, but the Government of Canada must work in partnership with the provinces and territories, via the Council of Ministers of Education, Canada (CMEC), to reach a better understanding of existing quality-assurance mechanisms. Subsequently, a communications strategy must be developed to better convey Canada's robust approaches to quality assurance to prospective international students.

The education brand for Canada is characterized by a broad spectrum of possibilities for international students and researchers with across-the-sector quality at its core.

Building on solid foundations: What has Canada achieved thus far?

The Edu-Canada initiative, a pilot launched in 2007 by DFAIT as part of the Global Commerce Strategy, has been successful in achieving all of its program objectives. The *Imagine Education au/in Canada* brand was created in partnership with the provinces and territories.

Edu-Canada's main achievement has been to bring greater coordination of recruitment and marketing efforts.

To build effectively on the partnerships with the provinces and territories, it is important to consider CMEC's response to the Council of the Federation's plan, [Bringing Education in Canada to the World, Bringing the World to Canada: An International Education Marketing Action Plan for Provinces and Territories](#). The plan, released in June 2011, emphasizes better coordination between provinces and territories, and closer collaboration with the federal government (DFAIT and Citizenship and Immigration Canada [CIC]) to attract a larger number of international students to Canada and to create more opportunities for Canadian students to study abroad.

Numerous provinces currently contribute significant marketing funds to international education and are developing more fulsome international education strategies, including British Columbia's International Education Strategy. In addition, associations such as the Association of Universities and Colleges of Canada (AUCC), Association of Canadian Community Colleges (ACCC) and Canadian Bureau for International Education (CBIE) have been actively

supporting their member institutions to prepare them for the international market and assist them in developing relationships with institutions in priority markets. But it is the institutions themselves that have shown the greatest investment, by maintaining long-term marketing initiatives, foreign representatives and offices, and by developing partnerships with foreign institutions that support joint research and education.

Of particular note is the contribution of the Canadian Consortium for International Education Marketing (CCIEM). The CCIEM has managed to unify most major associations that represent the full spectrum of the education systems in Canada to speak with one voice. The CCIEM has been active and vocal in its advocacy for international education in Canada, including leading research into establishing pathways between the respective sectors. We encourage the CCIEM to continue its efforts to unify all major Canadian voices in education.

Charting the course for the future: what Canada needs to do now

We believe Canada is facing a unique window of opportunity that requires coordination of our promotional efforts in order to seize Canada's share of top talent. The panel has come to define Canada's value proposition as one of offering high quality at affordable costs in a safe, multicultural environment.

We believe that Canada can only reach its potential when the federal government, the provinces and territories, education associations and institutions align their respective strengths under the same umbrella: Canada. We have reached a consensus that Canada's International Education Strategy should focus on a set of recommendations that can be categorized into five themes:

1. ***Targets for success:*** These recommendations are at the core of the strategy, they focus on achievable goals for the growth of international student numbers as well as an increase in international mobility opportunities for Canadian students (*Chapter 5*).
2. ***Policy coordination and ensuring sustainable quality:*** One of the greatest challenges in international promotion of education in Canada is coordinating the efforts of various partners and stakeholders. These recommendations clarify the ongoing coordination mechanism and address the intrinsic value of quality of the education offering (*Chapter 6*).
3. ***Promotion of Education in Canada:*** These recommendations delve into practical issues related to education promotion efforts, including selecting priority markets in which to focus Canada's efforts, honing Canada's brand and ensuring we are effective and successful in our usage of new media (*Chapter 7*).
4. ***Investments:*** These recommendations convey the need to be strategic in how we package our scholarship offering. As the strategy seeks to attract top talent, Canada must be competitive in recruiting the best and brightest international students. Scholarships are a key means to promote Canada's culture of excellence (*Chapter 8*).
5. ***Infrastructure and support:*** Promotional efforts must occur in alignment with study permit issuance. The remaining recommendations focus on the visa processing system as well as facilitating the process through a greater exchange of information and expertise between the Government of Canada and the education sector (*Chapter 9*).

Our recommendations

Targets for success

Recommendation 1: Double the number of international students choosing Canada by 2022

Canada's International Education Strategy should seek to double the number of full-time international students, from 239,131 in 2011 to more than 450,000 by 2022. We consider this to be a realistic goal, given our assessment of the growth trends in international education and our ability to sustain quality. Canada's education systems have the capacity to absorb new international students without displacing domestic students.

Recommendation 2: Introduce an International Mobility Program for Canadian Students to serve 50,000 students per year by 2022

In order to fully realize the multifaceted aspirational goals of internationalization, the Government of Canada should consider co-funding, with academic institutions and/or provincial/territorial governments, a major student mobility program to create opportunities for 50,000 Canadian students per year to go abroad for study and cultural exchanges, service learning and other experiential learning activities by 2022. It is anticipated that this investment will be matched by institutions and/or provinces/territories and private donors by a 2:1 ratio. This opportunity would be available across the sector (K-12 through post-secondary institutions).

It is essential that institutions also continue to provide opportunities for faculty exchange and research partnerships with foreign institutions. We also see a role for the private sector to encourage Canadian students to become global citizens.

Further, we acknowledge that Canadian students are powerful ambassadors that can market opportunities to study in Canada to their fellow students abroad.

Policy coordination and ensuring sustainable quality

Recommendation 3: Make internationalizing education in Canada a strategic component of Government of Canada official policies and plans

The importance of internationalizing education in Canada has to be recognized as a strategic component of the Government of Canada's Economic Action Plan, its international trade and innovation strategies, and its immigration and foreign policies. All partners and stakeholders (relevant government agencies, provinces/territories, and academic institutions) should be strongly encouraged to make internationalization a key priority and to take appropriate, aligned actions.

The panel recommends that education be a key pillar of official missions undertaken by the Government of Canada to priority countries. For example, the Prime Minister during his speech at the 2012 World Economic Forum in Davos, Switzerland, stressed the need to make key investments in science and technology to sustain a modern competitive economy. Given the interconnectedness of the knowledge economy, Canada's International Education Strategy must be a part of the government agenda to ensure policy alignment with economic, trade and immigration policies. Further, to engage in knowledge diplomacy, the international education strategy needs to be integrated into official missions abroad.

The way forward: The panel sees the Prime Minister as a unifying champion for international education.

Recommendation 4: Create a Council on International Education and Research to provide policy advice to the ministers of International Trade, Finance, Citizenship and Immigration, and Industry

To ensure effective positioning of Canada in international markets, a high-level, formal coordination structure is required. The panel recommends the formation of a Council on International Education and Research (CIER). We recommend that the council should be representative of all the sectors of education and regions of Canada and be composed of the three federal deputy ministers (international trade, citizenship and immigration, and industry), the chair and two other deputy ministers of the Advisory Committee of Deputy Ministers of Education, and other stakeholders appointed by the Government of Canada. It will provide policy advice to the ministers of International Trade, Finance, Citizenship and Immigration and Industry monitor progress on implementation of the strategy and will remain accountable to the Canadian public via annual reports.

The way forward: Overall responsibility for operational management of Canada's International Education Strategy should rest with DFAIT. The department will work in close collaboration with CIC (a major partner in this initiative) and stakeholders. The work of the council should be supported by a secretariat within the appropriate branch of DFAIT. We also recommend that, as required, small joint working groups with appropriate representation be convened under the auspices of the CIER on issues related to marketing, scholarship coordination, immigration and visa processing issues.

Recommendation 5: Maintain and enhance the quality of the education systems and ensure their sustainability

Across-the-sector quality is the core of Canada's brand. We recommend that adequate mechanisms be put in place to ensure that this quality is maintained and enhanced. Such mechanisms should be a core part of our international education strategy.

The way forward: Given provincial/territorial jurisdiction over education, we recommend that the Council on International Education and Research work closely with CMEC to establish clear guidelines on quality assurance and a quality-assurance framework that will ensure that Canada's reputation for quality education and support of international students is maintained.

We see a need to work closely with CMEC and the provinces/territories to fully embed education, innovation and trade into our ongoing policy development.

Promotion of Education in Canada

Recommendation 6: Focus Canada's promotional efforts on a limited number of priority markets for targeted resource allocation

We recommend that resources for promotion activities should be focused on the markets currently assessed to have the greatest growth potential for Canada: China, India, Brazil, the Middle East and North Africa (MENA) region including Turkey, Vietnam and Mexico. These markets should receive priority resource allocation. Mature markets, such as South Korea, the United States, France and the United Kingdom, should receive substantial resources to maintain activities at a level at least equivalent to current funding.

The way forward: A re-evaluation of priority markets should be carried out every three years (under the purview of the CIER with appropriate consultation with provinces/territories and CIC). As one size does not fit all, the panel recommends the development of country-specific strategies and an enhanced role for Canadian embassies and offices abroad. These activities will draw heavily on a strengthened, innovative and renewed e-platform.

We also recommend that, in order to complement the expertise of trade commissioners, experts from the academic institutions or associations should be seconded to DFAIT. Canadian offices abroad in the key markets should form education teams comprising trade commissioners and visa officers. These education teams should be accountable to the head of mission for the promotion and facilitation of the international student recruitment process.

Recommendation 7: Increase marketing of Canada's brand

Research shows that international students first choose the country in which they wish to study and, subsequently, the institution. A stronger presence of the Canada brand abroad at key international events, where stakeholders and institutions are united under one banner, will strengthen Canada's recognition and international students' exposure to the possibility of studying and conducting research in Canada.

The way forward: Develop a comprehensive communications strategy that will see the profile of the *Imagine Education au/in Canada* brand reflected in all areas of marketing, media relations, event promotion and digital communications, to ensure the coordinated messages of the brand proposition and representation of education opportunities in Canada are delivered with even greater impact and to develop comprehensive strategies for priority countries. Organizing participation at key international education trade fairs, branded promotion activities and continued Canada trade fairs are all part of this initiative. Tailored activities should be undertaken for specific subsectors to ensure the niche needs of each sector are met and that brand-eligible education providers in Canada come to fully endorse and apply the brand in their own marketing activities.

Recommendation 8: Develop a sophisticated and comprehensive e-communication system that will serve as a national portal for international students interested in education in Canada

To effectively share information with potential international students, it is critical to have a sophisticated website that is well populated with easy-to-navigate resource material on education options in Canada. This website could have comprehensive information on institutions, with links to each institution's website; a comprehensive list of potential programs of study; advantages of studying in Canada; and video testimonials from international students currently studying in Canada. As peer-to-peer marketing is known to be particularly effective, alumni testimonials should also be featured prominently.

The world has undergone a digitization process. The Canadian embassy in Beijing's Weibo (the Chinese version of Twitter) currently has 300,000 members. We strongly believe that e-marketing has replaced the "bricks and mortar" approach, given its capacity to multiply the effectiveness of communications. As such, the panel urges investments in the e-communication system.

This sophisticated operation should be carried out in three phases:

1. Information sharing: marketing and providing student advice (social networking)
2. Integration with a pan-Canadian coordination centre for online student applications
3. Integration with visa processing (CIC)

The way forward: The panel recommends a thorough re-tooling and upgrading of the current website, [Education in/au Canada](#), which could be designed by a professional e-commerce company external to government. The enhancement of the website should be coupled with a greater use of social media platforms to communicate Canada's marketing messages, tailoring key messages for social media usages in specific priority countries.

A pan-Canadian coordination centre: In phase two, explore coordinating international student applications to Canadian institutions through the use of state of the art information technology. Given provincial/territorial jurisdiction for education, a pan-Canadian coordination centre would best be facilitated by the CMEC.

In phase three, integration with visa processing would occur. This would require continued and strengthened collaboration between DFAIT and CIC.

Investments

Recommendation 9: Brand Canada through scholarships for international undergraduate students

As a means of attracting top talent at the beginning of their post-secondary education, and to compete more effectively with the major competitor countries for the best and brightest international students, the Government of Canada should provide co-funding for 8,000 new Canada scholarships for top international undergraduate students to study at Canadian universities, colleges and polytechnics. It is anticipated that this investment will be matched by institutions and/or provinces/territories and private donors by a 2:1 ratio.

Recommendation 10: Regroup grants and scholarships available to international graduate students and post-doctoral fellows under one label/brand, with a focus on priority areas aligned with Canada's innovation and prosperity agenda

To enhance Canada's innovation and S & T strategy, existing funding available to international graduate students in the forms of grants/scholarships from various government agencies should be coordinated and, where necessary, repackaged in such a manner that allows effective promotion under the Canada brand.

Additional investment would allow Canada to leverage existing opportunities to attract top students by matching country scholarship programs, such as the China Scholarship Council, the Brazilian Science Without Borders scholarships, or the Saudi Arabia King Abdullah scholarships. It will also enable Canada to compete with key international scholarship countries such as the United States, United Kingdom and Australia to attract top scholars and researchers.

The way forward: We recommend a better alignment of international research grants offered through Canada's granting councils [the Natural Sciences and Engineering Research Council (NSERC), the Social Sciences and Humanities Research Council (SSHRC) and the Canadian Institutes of Health Research (CIHR)], with particular emphasis on a small number of priority countries. An inter-ministerial working group, with representatives from the granting councils and other government departments, could develop a coordinated strategy to re-package existing grants/scholarships to streamline the delivery of the various programs supporting international graduate and post-doctoral students, to ensure cohesive branding and that potential international students are made aware of these opportunities.

Ultimately, all international scholarships should be regrouped under one label/brand, such as Canada Scholarships, to manage all available resources to maximize Canada's brand recognition. At steady state, there should be sufficient funding (from existing grants and new investments) to enable the Government of Canada to provide 2,000 international graduate scholarships/grants and 1,000 post-doctoral fellowships per year under a unified brand.

Recommendation 11: Develop comprehensive and multifaceted bilateral agreements with priority countries that focus on all aspects of graduate education and research, supported by appropriate levels of funding

From our benchmarking work, we have learned of comprehensive and multifaceted bilateral relationships developed by countries (such as the United Kingdom) with priority countries. The panel sees tremendous strategic value for Canada in developing such agreements and recognizes that relationships in the area of R & D already exist with some priority countries. The panel recommends that these elements be incorporated into more comprehensive, country-specific bilateral agreements with a focus on all aspects of graduate education and research and that appropriate levels of funds be allocated to support such a strategy.

Infrastructure and support

Recommendation 12: Improve education visa processing to provide consistent and timely processing of high-quality candidates

Aggressive processing time targets should be established, especially in key markets, to compete with other competitor countries and jurisdictions. CIC needs to increase staffing levels to accomplish this goal. Funding for this activity should come from visa fees collected from the applicants.

Efforts to attract international students and researchers to Canada will be hampered without a coherent and well-supported visa system to process their entry. The panel stresses that efforts to recruit international students must be congruent with CIC activities.

However, it is of national importance that the integrity and quality of the visa and immigration system be maintained. CIC must be supported in efforts to ensure competitive processing times and client service in the face of growing volumes. Meeting this processing demand will put pressure on visa officers, requiring an increase in staffing levels and a need for accurate training.

The way forward: The panel recommends that visa offices be adequately resourced to allow the processing of increased numbers of study permit applications. This will require additional operating funds. A review of the fees charged for study permits, which are significantly lower than our competitors, should be considered.

Recommendation 13: Expand and facilitate comprehensive training for staff at Canadian embassies and offices abroad on Canada's diverse education offerings and study pathways. Training opportunities should also be available for stakeholders to gain a deeper understanding of both the programs and cultural support required by international students

A two-way flow of information is required to ensure quality control and management of capacity. Given frequent changes to visa policies, it may be helpful to provide learning opportunities where experts from the education sector can come together with visa officers abroad. Visa and trade officers would benefit from training to gain a clear and detailed understanding of the education offerings in Canada. Overarching lessons learned could be shared with the broader community via targeted workshops or webinars. The underlining objective of the training is to ensure that qualified applicants obtain their visas and that students have a quality experience that is supported by adequate services.

Recommendation 14: Support the expansion and promotion of the existing Canadian Experience Class program to contribute to Canada's skilled immigrant and labour market needs

CIC's Canadian Experience Class program can be better promoted and leveraged to retain graduates from eligible institutions and post-secondary programs who have at least one year of work experience in Canada in a managerial, professional, technical or trade occupation after graduation.

Conclusion

In our view, Canada has strong foundations in international education. Canada's institutions offer high quality in all subsectors. Provincial/territorial jurisdiction has allowed for the development of a rich and diverse educational landscape.

For Canada to achieve its goals, we do not see the need for a major overhaul. It is clear to us that collectively, the efforts of provinces/territories, education associations and individual institutions are putting Canada on the right path. Rather, we see the need for course corrections so that we do not stray from that path. Some changes are required, mainly regarding the coordination of our promotional efforts to ensure they are cohesive and coherent, as well as more extensive use of digital strategies. Furthermore, governments, both federal and provincial/territorial, must ensure there is an alignment of education, labour market and immigration policies.

This report will highlight the many benefits of international education, both economic and societal. It is important for the panel that all Canadians embrace the benefits to Canada of international education. In the global knowledge economy, how we manage international education will affect the course of our economic prosperity as well as our place in the world.

The panel recognizes recent Government of Canada investments related to international education, including specific funding allocations to revise the international education strategy. The extent to which Canada can seize this current moment and become a leader in international education is commensurate with the investment we, as a country, are prepared to make to support internationalization efforts at all levels.

List of Recommendations

1. Double the number of international students choosing Canada by 2022
2. Introduce an International Mobility Program for Canadian Students to serve 50,000 students per year by 2022
3. Make internationalizing education in Canada a strategic component of Government of Canada official policies and plans
4. Create a Council on International Education and Research (CIER) to provide policy advice to the ministers of International Trade, Finance, Citizenship and Immigration, and Industry
5. Maintain and enhance the quality of the education systems and ensure their sustainability
6. Focus Canada's promotional efforts on a limited number of priority markets for targeted resource allocation
7. Increase marketing of Canada's brand
8. Develop a sophisticated and comprehensive e-communication system that will serve as a national portal for international students interested in education in Canada
9. Brand Canada through scholarships for international undergraduate students
10. Regroup grants and scholarships available to international graduate students and post-doctoral fellows under one label/brand, with a focus on priority areas aligned with Canada's innovation and prosperity agenda
11. Develop comprehensive and multifaceted bilateral agreements with priority countries that focus on all aspects of graduate education and research, supported by appropriate levels of funding
12. Improve education visa processing to provide consistent and timely processing of high-quality candidates
13. Expand and facilitate comprehensive training for embassy staff on Canada's diverse education offerings and study pathways. Training opportunities should also be available for stakeholders to gain a deeper understanding of both the programs and cultural support required by international students
14. Support the expansion and promotion of the existing Canadian Experience Class program to contribute to Canada's skilled immigrant and labour market needs

CHAPTER 1: Mandate of the Advisory Panel

1.1 Guiding principles

Budget 2011 allocated \$10 million over two years to develop and implement an international education strategy that will reinforce Canada as a country of choice to study and conduct world-class research.

In order to achieve this vision, an advisory panel of experts, reporting to the ministers of Finance and International Trade, was named on October 13, 2011. We, the panel, were tasked with making recommendations on the strategy and setting out the contributions of all partners. Specifically, the panel was asked to provide advice on a range of issues related to the post-secondary international education sector. Early on, we acknowledged the need to consult extensively with federal, provincial and territorial governments. We took particular note of CMEC's international education marketing action plan, entitled *Bringing Education in Canada to the World, Bringing the World to Canada: An International Education Marketing Action Plan for Provinces and Territories*, released in June 2011. Given the interrelatedness of the different education sectors, we also adopted a broader approach to our mandate and included education stakeholders from all sectors and all regions of the country. Our aim throughout this process was to root our work in the values of inclusiveness, openness, transparency and collaboration.

The terms of reference that framed the mandate of the advisory panel specified that we were to ensure the strategy maximized economic opportunities for Canada in the field of international education, including strengthening our engagement with emerging key markets, focussing on attracting the best/brightest international students, expanding the delivery of Canadian education services abroad, and building and expanding greater partnerships between Canadian and foreign institutions.

1.2 Our vision for 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.

We, the Advisory Panel on Canada's International Education Strategy, believe that international education in all its facets brings tremendous value to every community in Canada, whether urban or rural, eastern or western, francophone or anglophone. The underlying goal of the strategy is to attract top talent that will drive Canada's future prosperity through strengthening our educational institutions, promoting research and innovation, building linkages for the future around the world, and attracting valued immigrants to help grow our economy. Canada is facing a unique window of opportunity. We believe this opportunity can be seized if we all coordinate our promotion efforts to ensure Canada achieves greater mindshare among the world's best and brightest, which is a necessary step toward increasing our market share of international students and researchers.

The panel has come to the conclusion that international education is a key driver of Canada's future prosperity, innovation, entrepreneurship and international trade. This report seeks to outline the benefits that international education brings to Canada. We have seen that there is close alignment between international education and a range of federal and provincial/territorial policies related to human capital, innovation and economic growth.

Broadly speaking, internationalization of education in Canada allows future generations of Canadians to acquire a global perspective, thus helping them to become engaged citizens of the world. In an increasingly integrated world, and in light of Canada's own growing engagement in trade, investment and geopolitical affairs, providing Canadian students with a global perspective is of strategic importance. A bold long-term strategy is required to realize these benefits.

Fortunately, many of the foundational pieces are already in place. Provinces and territories have already taken a leadership role in international education. Institutions at all levels of our education sectors—language schools, K-12, post-secondary education (colleges, polytechnics, Cegeps and universities)—have been active in the international arena, as have many professional associations.

Canada now needs to take the next steps. The OECD estimates that the global demand for international higher education is set to grow from 3.7 million students in 2009 to 6.4 million by 2025. Most of the growth will come from developing and emerging countries as they recognize the importance of an educated and intercultural population as the driver for economic prosperity and social progress. The strategy should support the development of partnerships, including with the private sector, bring greater coordination to our various initiatives and make a commitment to strategic investments. This will strengthen Canada's engagement with emerging economies and ensure greater collaboration between institutions in Canada and abroad.

1.3 Process

1.3.1 Online consultations

At the outset of our work, we saw an immediate need to consult in the broadest way possible. A consultation process was launched using an online survey. A total of 143 submissions were received. The majority of submissions came from the college/polytechnic sector (28 percent) and the university sector (27 percent), with other submissions coming from education associations, Canadian missions abroad, private organizations, language schools, K-12 school boards, and private colleges. Submissions were received from across the country, the majority from Ontario and British Columbia (accounting for 50 percent of submissions received).

The most frequently mentioned issue was that the international education strategy should be inclusive of all education sectors (K-12 through PhD). Great emphasis was also placed on undergraduate student recruitment, international partnerships, international research collaboration, visa and immigration policies, and opportunities for Canadian students to study abroad.

1.3.2 Regional round tables

In order to gain further insight into the thoughts and issues raised in the online consultation process, the panel hosted a series of in-person round tables to engage and exchange ideas with partners and stakeholders in Ottawa, Halifax, Montréal, Toronto (two), Edmonton and Vancouver. During the seven round tables, we met

with 138 representatives of national and regional education associations, institutions and private organizations. Citizenship and Immigration Canada was represented at each round table. Provincial and territorial representatives were also invited to attend, given our awareness of their jurisdiction over all matters related to education.

Overall, the most salient themes of these discussions were: the importance of two-way student and faculty mobility, maintaining quality, that the strategy be mindful of regional and sectoral differences, ensuring adequate visa processing timelines, and aligning the strategy with labour market shortages and immigration policies.

1.3.3 National collaboratory

To establish priorities based on the round table discussions and online consultation, the panel invited a group of individuals to a “collaboratory”. At the collaboratory, the advisory panel invited all partners (provincial representatives) and stakeholders (education associations, institutions and experts) to discuss new ideas based on the previous consultations and round tables. The collaboratory brought together 57 representatives from the federal government (including CIC), provincial governments (at the deputy minister or assistant deputy minister level), education associations and institutions (presidents and/or directors of international offices). Finally, this process helped identify a set of priorities to guide our recommendations on the international education strategy. The consensus determined the priorities that now form the basis for our recommendations, as presented in this report.



Participants at the collaboratory following a keynote address by His Excellency the Right Honourable David Johnston, Governor General of Canada.

1.3.4 Group discussions

Following our engagement with provincial/territorial governments and the education sector, we also wanted to take the opportunity to meet with specific groups that could provide valuable insights for our recommendations. We met with representatives from private-sector industries to discuss their labour market needs. These discussions raised a key point related to the entrepreneurial potential of international students. We reached out to international students currently studying in Canada to listen to their views and learn from their experiences. We were particularly interested in their views on the costs incurred related to health care (which was raised several times as a potential inconvenience). International students are savvy shoppers; they are courted by several competitors. Their views indicated we must ensure we are true to our promise and that we are providing a quality education experience and adequate support services. In an era of social media, there is a strong risk that any negative experience will be shared with a broader audience. These discussions allowed us to validate and recalibrate our findings.



Current international students participating in the group discussion session on March 27, 2012.

1.3.5 Benchmarking mission

Our research revealed that China and India are important markets for education providers in Canada. The panel traveled to both countries to gain a more in-depth picture of opportunities to expand our Canadian presence in these markets. This education familiarization tour visited four cities: Shanghai, Beijing, New Delhi and Bangalore. We met with international partners, educational institutions and government agencies. This opportunity allowed us to validate our initial thoughts with regard to future directions for the strategy. The most important lesson from this mission was the common realization that the world has moved beyond the bricks and mortar approach to providing services. We found that a digital approach would be a more effective use of resources to reach a wider target audience, as opposed to the establishment of physical offices. Our recommendations thus turned to a greater focus on being successful in social media and e-communications. We also saw that each market is unique: there is no one-size-fits-all approach.

1.4 Research papers

We turned to a variety of research to inform our deliberations. Two reports were of particular importance: *Economic Impact of International Education in Canada—An Update*, by Roslyn Kunin & Associates, and *Canada's Capacity for International Student Enrolment*, by the Illuminate Consulting Group.

1.4.1 Economic impact of international education in Canada—an update

This report suggests that, in 2010, international students in Canada spent in excess of \$7.7 billion on tuition, accommodation and discretionary spending (up from \$6.5 billion in 2008). More than \$6.9 billion of this revenue was generated by the 218,200 long-term international students in Canada, of which 37 percent came from China and South Korea. In addition, short-term language students contributed \$788 million to the Canadian economy. When accounting for additional tourism benefits from international students, the report finds that the expenditure resulting from international students in 2010 was \$8.0 billion, which translates to 86,570 jobs and \$455 million in government tax revenue.

1.4.2 Canada's capacity for international student enrolment

Overall, this report found that Canada displays no notable capacity issues regarding international post-secondary education students at a national level. According to 2009 data, international students comprise 7.5 percent of post-secondary enrolment in Canada at the national level (compared to 23.2 percent in Australia) and only 0.7 percent of K-12 enrolment. These enrolment ratios vary only slightly across Canada. In some smaller provinces (population-wise) the ratio is very low in international comparison (and relative to larger provinces), allowing for sustainable growth opportunities. Projecting a high-growth scenario (if domestic enrolment were to grow at its average rate over the last five years and international enrolment were to grow at 10.0 percent year-over-year), international students would account for 17.3 percent of total post-secondary enrolment in Canada by 2020. The report concludes that given the strong international student growth dynamics since 2008, the issue to be faced is not capacity itself, but how capacity is being managed to maintain Canada's reputation for quality.

1.5 Our value proposition: consistent quality at a reasonable cost

Canada's brand is based on consistently high quality and a reputation for excellence across the entire education sector. Canada offers international students a safe and multicultural learning environment where they can choose to study in English or French. Further, international students have the option to work during their studies and can also apply to work upon completion of their studies and become immigrants through the Canadian Experience Class (CEC), a pathway to permanent residence.

Given the growth in global demand for international education, Canada is well positioned to capitalize on this window of opportunity with the value proposition of consistently high quality at a reasonable cost.

We firmly believe that maintaining high quality is paramount. The Government of Canada must work in partnership with the provinces/territories, via the Council of Ministers of Education, Canada (CMEC), to reach a better understanding of existing quality-assurance mechanisms.

The education brand for Canada is characterized by a broad spectrum of possibilities for international students and researchers with across-the-sector quality at its core.

- In the K-12 sector, students in Canada are consistently ranked among the world's top five academic performers in reading, mathematics and science by the OECD's Programme for International Student Assessment.
- Language schools in Canada also offer opportunities for international students at all levels, providing a wide variety of programs in English and French for further study, personal development or business training.
- Canada's colleges, polytechnics and Cegeps complement the universities with their industry-aligned, career-focused programs and their growing levels of applied research directed at solving industry problems.
- Canada's universities are among the best in the world: in 2011, there were 22 Canadian universities in the top 500 of the Shanghai Academic Ranking of World Universities; 20 in the top 500 of the QS World University Rankings; and 18 in the Top 400 of the Times Higher Education World University Rankings. Our universities are also linked to the international community through more than 5,000 active exchange agreements with university partners around the world.

1.6 Parameters for the work of the panel

It is important for us to underline that our recommendations are mindful of the economic constraints in which the Government of Canada currently operates. Our recommendations were developed with a long-term perspective, recognizing that investments from all relevant parties will be required over the years to ensure Canada's enduring success in international education. We therefore submit our views to inform the Government of Canada's policy development in regard to its international education strategy with a long-term view.

Further, we were mindful and respectful throughout our process of provincial/territorial jurisdiction over education. However, we do hope that our efforts will inspire provinces/territories as well as education associations and institutions to carry forward the spirit of engagement we saw come alive during the engagement process. So much good work has already been accomplished. We see the way forward as needing to coordinate and build upon these achievements, as we firmly believe the whole is greater than the sum of its parts. This is a critical time for Canada; we hope our recommendations will help coordinate our collective efforts to seize this window of opportunity.

CHAPTER 2: Why International Education Matters

International education is a key driver of Canada's future prosperity, particularly in the areas of innovation, trade, human capital development and the labour market. In addition, Canada lives by international trade and we face an increasingly dynamic and competitive market place. We believe that international education in all its facets brings tremendous value to every community in Canada, whether urban or rural, eastern or western, francophone or anglophone.

In the global knowledge-driven economy, Canada needs to educate highly qualified and skilled people who can take their place among the best and the brightest in the world. The internationalization of Canada's education and research institutions through international partnerships and exchange of talent is thus of substantial importance as it supports Canada's S & T and innovation agendas.

The second benefit to Canada of international education is that it allows current and future generations of Canadians to acquire a global perspective, thus helping them to become citizens of the world who can contribute to the "diplomacy of knowledge". In an increasingly integrated world, and in light of Canada's own growing engagement in trade/investment and geopolitical affairs, providing Canadian students with a global perspective is of great strategic importance.

Third, the near-term economic impact is significant to Canada's national and regional economies as we strategically diversify our exports by sector and by region. With the alumni networks established through those international students who return to their home countries, Canada gains advocates who can assist in opening doors to foreign partners.

Fourth, an international education strategy that is well aligned with our immigration and labour market strategies can help Canada in addressing demographic and labour market issues.

Fifth, we must recognize the immediate benefits of international education for Canada, spanning economic growth, job creation and increased exports and investment. These benefits are distributed across all of Canada, from coast to coast to coast.

"Education is one of the most important drivers of a country's competitiveness. In this increasingly globalized world, ensuring that Canadian university students have access, not only to the best education in the world but also to the best international students in the world, is crucial for our long-term competitiveness and success."

Dominic Barton
Managing Director, McKinsey and Company

2.1 Supporting Canada's innovation, science and technology agendas

We have seen that Canada recognizes the value of innovation, science and technology as drivers of sustainable long-term economic growth. The Government of Canada has made its commitment in this area clear. Guided by Mobilizing Science and Technology to Canada's Advantage, an S & T strategy launched in 2007, the federal government has invested heavily in fostering Canada's competitiveness through our entrepreneurial advantage, knowledge advantage and people advantage. This involves substantial efforts to maintain Canada's reputation for research excellence. In its 2009 progress report on the S & T strategy, the government upheld that: "Performing top-notch research and attracting and retaining outstanding researchers at our Canadian universities will help advance Canada's position in the global, knowledge-based economy and increase our access to the world's best ideas."¹

The Science, Technology and Innovation Council (STIC) noted in its *State of the Nation 2010* report that: "Research excellence is defined at an international level, and the competition for research talent is global. As a mid-sized, open, trading economy, Canada's orientation must be global if it is to access scientific knowledge generated outside our borders."² With respect to research talent, STIC reported, "The number of doctoral degrees is also an indicator of the labour force potential to engage in cutting-edge research and training the next generation," but pointed out that Canada produces fewer doctoral candidates per capita than many other OECD countries.³ For example, compared to Australia, Canada has a significantly higher share of the domestic population with a post-secondary education at 49 percent compared to approximately 18 percent.⁴ However, in 2008 Australian universities produced nearly 270 graduates of doctoral (advanced research) programs per million population, compared to only 145 per million population in Canada.⁵ This trend might be accounted for by a higher number of international students pursuing their doctorate education in Australia. Attracting a greater number of international doctoral candidates would likely improve Canada's performance in producing greater research talent. The council applauded the value of recent programs supporting Canada's research excellence through international talent, including Canada Excellence Research Chairs (CERC), Vanier CGS and Banting Postdoctoral Fellowships. These programs are steps to enable Canada to produce internationally competitive research and become a part of important international research networks.

We believe that international research collaboration makes a valuable contribution to Canada's innovation agenda and economic future. Collaborating with international partners on major research programs is an efficient means of managing human, financial and capital resources, especially in disciplines requiring specialized instrumentation or facilities. Research collaboration is also key to recruiting the best and brightest graduate students and researchers. Canadian institutions have a reputation for high-quality, leading-edge research and infrastructure, and supporting their engagement in large-scale research collaboration will help fill a critical gap in Canada's innovation system.

In its S & T strategy, the Government of Canada also stressed the necessity of growing Canada's base of knowledge workers with talented, skilled and creative people. The recent Review of Federal Support to Research and Development, led by an independent expert panel chaired by Tom Jenkins, emphasized the message that top talent is necessary to support innovative activity. As the Jenkins panel stated in its report:

Canada's future as an innovation-based economy depends on ensuring there are sufficient numbers of talented, educated and entrepreneurial people. [...] This demands a collaborative approach that brings together our post-secondary institutions, federal and provincial agencies as well as industry and other partners to ensure appropriate recruitment, training and deployment for industrial innovation needs.⁶

We recognize the ample investments in job creation through innovation, research, education and training that the Government of Canada has made, particularly through funding allocated in its Economic Action Plan 2012. We see international education as the perfect complement to many of these initiatives. A 2007 study published by Duke University and the University of California, Berkeley, found that one quarter of all engineering and technology companies established in the United States between 1995 and 2005 had at least one immigrant key founder.⁷ Strikingly, in 2005 these immigrant-founded companies generated more than \$52 billion in sales revenue and created almost 450,000 jobs.⁸ A follow-up study found that of these immigrant entrepreneurs, 52 percent initially entered the United States as students.⁹ We are certain that Canada's innovation, science and technology agendas would benefit greatly from this kind of increase in importing entrepreneurship and competition. International education will make a powerful contribution to Canada's competitiveness on the global stage, by reinforcing our supply of talent to provide input to the innovation that Canada needs.

Mitacs Globalink: Showcasing Canada as a top research destination

Now in its fourth year, the Mitacs Globalink program brings the world's top undergraduate students to Canada for a research project at a Canadian university. For students, the three-month program is an opportunity to experience Canada's universities and research facilities, while building friendships and relationships with Canadian students, faculty members and industry representatives.

This year, Mitacs is preparing to welcome close to 300 of the world's best and brightest. Since the program was created, close to 100 former Globalink students applied to return to Canada for their graduate studies.

One example of a student who returned to Canada is Girish Nivarti. In 2009, Girish was a top science undergraduate from the Indian Institute of Technology Kharagpur and participated in Globalink. Girish, who chose to return to UBC in September 2011, says, "I thank Mitacs and Globalink for giving me three months with Professor Kendal Bushe, one of North America's top professors in combustion research. That convinced me to come back to UBC so I can work with Professor Bushe again."

Internationalization also allows Canadians to learn from the world leaders in scientific and technological research, build capacity for future growth, spread Canada's reputation for research excellence, and play a role in providing solutions for the world of tomorrow.

Datawind: Canadian innovation serves the world

In April 2012, Canada was featured front and centre at the commercial launch of the UbiSlate tablet computer. The seven-inch portable device, priced at approximately \$60, was developed and designed in Canada by Datawind. The Montréal-based company previously made headlines for developing the Aakash, an affordable tablet contracted by the Indian government to provide at a subsidy to millions of Indian students (the UbiSlate tablet is the consumer version of the Aakash). The founders of Datawind, brothers Suneet and Raja Singh Tuli, came to Canada as young boys and eventually pursued their education at the University of Toronto. Describing his education in Canada, Suneet says, "It taught me how to think outside of the box. Passionate teachers and professors, safe and cosmopolitan welcoming communities, at the doorstep of the world's biggest markets—Canada is the only place in the world I'd choose for my kid's education." Now, with products like the UbiSlate and Aakash tablets, he is working to make the Internet more accessible to people in India and other parts of the world.

2.2 Internationalization and the “diplomacy of knowledge”

Through our experience and our engagement with the education sector, we have seen first-hand that internationalization of Canadian institutions is a highly pressing priority on campuses across the country. We view internationalization as the process of bringing an international dimension into the teaching, research and service activities of Canadian institutions.^{iv} Activities supporting internationalization include exporting Canadian knowledge services, engaging in international research collaboration, attracting international students and researchers to Canadian campuses, and encouraging Canadian students to pursue international learning experiences.

We have heard from some institutions that are very active in all of these areas, whereas others are in the early stages of internationalization, depending on their strengths and priorities. Nonetheless, all of these institutions are working hard to ensure that the education their students (both Canadian and international) receive is supplemented with a sense of global citizenship, by providing them with the intercultural competencies to become leaders in the global knowledge economy. The development of global citizens makes a powerful, positive contribution to what is described as the “diplomacy of knowledge”.

International education enables a multidirectional flow of young people around the world and enables knowledge to transcend boundaries. By engaging in international education, Canada advances its own public diplomacy goals and prosperity while supporting the growth of the global knowledge economy. International alumni of Canadian institutions can go on to become leaders around the world. Their experience of Canada’s culture, values and opportunities will form the foundation for meaningful bilateral relations between Canada and their home countries. Conversely, Canadians who have the opportunity to learn and work abroad will develop the cultural and language skills to act as ambassadors for Canada by demonstrating Canadian values the world over.

Memorial University of Newfoundland: Balancing internationalization on the edge

At Memorial University of Newfoundland, balancing internationalization is a tri-focused effort: supporting inbound students, facilitating international experiences for domestic students and engaging the local community with diversity. Memorial works to balance the realities of geographical isolation and high costs of travel with a special obligation to prepare students who have little experience with cultural diversity to be comfortable with different world views. While continued recruitment of international students is important, equally important is ensuring that our domestic students are provided with opportunities for meaningful international education experiences at home and abroad. This vision guides the planning of Memorial’s internationalization initiatives.

One of the university’s career programs aimed at professional skills development connects international students to volunteer opportunities in the local community, for example assisting a local community organization with the logistics of running the weekly farmers market. Memorial’s Peer Mentor Program not only supports new international students but also focuses on domestic student mentors using the Intercultural Development Inventory as an assessment tool to measure mentors’ pre- and post-experience with internationalization at home. The Global Engagement Grant is a fund accessed by both domestic and international students to plan joint events that meet campus internationalization goals. Throughout these examples runs a common thread: that Memorial strives to portray its international student population as a valuable resource, with the hope that through this positive approach, everyone benefits.

iv Adapted from the AUCC definition of “internationalization”. Refer to Chapter 5.2 for more information.

Educating international students in Canada also has the potential to have a significant impact on Canada's future trade and foreign policy relationships in foreign countries. Likewise, the strategy should ensure that Canadian students have the opportunity to add value to their quality Canadian education with the opportunity for an international exchange or internship. Recruitment and retention of international talent is an essential and increasingly important component of building a modern society and an innovation economy. Through international education, Canada will be better positioned to engage in global trade and investment, geopolitical affairs, and international development.

University of Regina: Fostering long-lasting international networks

As the world becomes increasingly interconnected, the University of Regina recognizes that the development of international education provides post-secondary institutions with a valuable and necessary competitive edge in the global marketplace. To this end, the university strives to foster strong and meaningful international partnerships based on principles of mutual respect and trust.

One of the most successful programs between the University of Regina and China is the Visiting Scholar Program. This unique scholarship welcomes dynamic individuals from the Foreign Affairs Bureau of the National People's Congress to study at the University of Regina for a maximum of 12 months. Participants are among China's brightest and most promising, selected by the National People's Congress based on their high involvement in China's central public administration and governance bodies.

"The lasting relationships we've forged and our networks of alumni across China have helped to strategically shape our institution as a leader in international education and innovation," says Dr. Vianne Timmons, President and Vice-Chancellor, University of Regina.



University of Regina international visiting scholars, 2011-12.
Photo courtesy of the University of Regina.

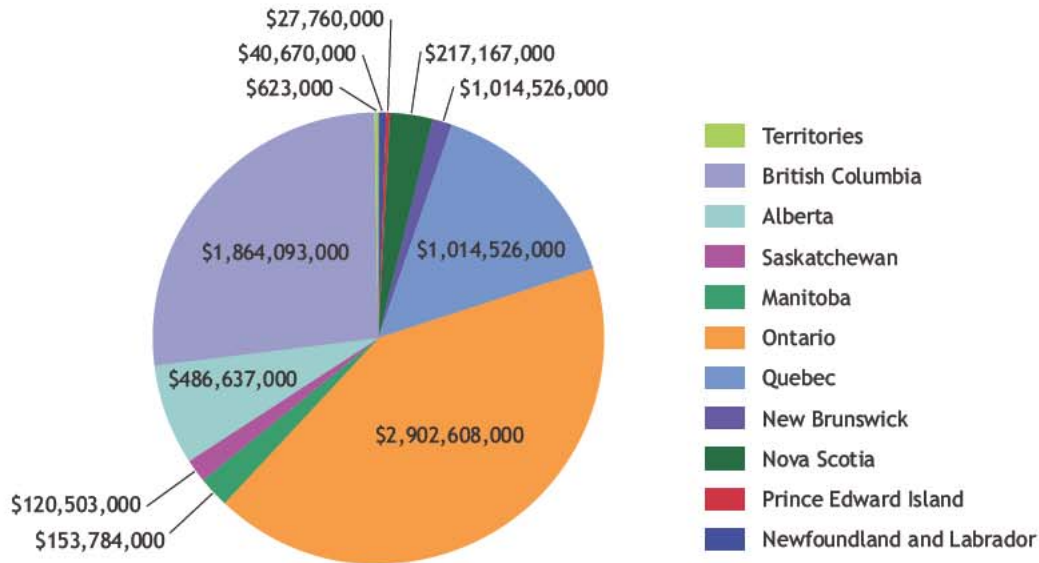
2.3 Economic impact of international education

As an export, international education services have a significant impact on our economy. A 2011 report commissioned by DFAIT indicated that, in 2010, international student expenditure on tuition, accommodation, and living expenses contributed more than \$8.0 billion to the Canadian economy and more than \$445 million in government revenues. Their expenditures spurred on economic activity that sustained jobs for more than 86,000 Canadians.

The spending of international students in Canada in 2010 was greater than total Canadian exports of unwrought aluminum (\$6.0 billion) or helicopters, airplanes and spacecraft (\$6.9 billion). The value of international education exports also represents a sizable portion of Canada's trade with key international partners when compared to the value of the goods they import. It was estimated in the report that Saudi Arabia spent the equivalent of 44 percent of the value of its imports from Canada on education services; this ratio was also high for India (28 percent), South Korea (19 percent) and China (14 percent). Moreover, education services are now viewed as Canada's number one export to China.

We believe that the economic impact of international students is noteworthy not just for its value, but because the economic benefits are spread throughout the country. Institutions in communities across Canada are actively attracting top talent from around the world. The expenditure of these students, therefore, makes a valuable contribution to all of Canada's provinces and territories.

Estimated expenditure of long-term international students in Canada by province (2010)



Source: data from Roslyn Kunin and Associates, Inc.

In addition, there is tremendous scope for economic contributions from the direct export of Canadian education services abroad by institutions. Canadian schools, colleges, polytechnics and universities generate millions of dollars in tuition revenue from programs of study offered abroad (i.e. knowledge exports). For example, in 2007–08, \$29.72 million in tuition revenue was reported for 32 programs provided abroad by 16 Canadian universities.¹⁰ During the same period, \$22.52 million in tuition revenue was generated by 57 Canadian colleges for 64 educational programs and 52 educational services offered abroad.¹¹ These figures—representing only a snapshot of revenue being generated at the time the institutions were surveyed—illustrate the impact of knowledge exports.

There is no doubt to us that international education makes a very considerable contribution to the Canadian economy. More importantly, the revenues generated by Canadian institutions through international education services, both domestically and abroad, enable them to build on their capacity to provide globally minded education that supports the development of highly skilled human capital.

2.4 Pipeline to the Canadian labour market

There have been numerous warnings that Canada will suffer a severe shortage of skilled labour within as little as a decade. Canada's talent shortfall will span all occupations: managerial, professional, technical and skilled trades, as well as highly accomplished researchers and scientists. The demographic pressure of an aging workforce will affect occupations in all sectors. These forces are leading to a situation where, as the Canadian Chamber of Commerce puts it, "We will have too few workers to meet the needs of our economy and of society."¹² In some regions, the challenge of talent shortages is already surfacing.

In the 2011 *Annual Report to Parliament on Immigration*, it was noted that, "Although school-leavers and other domestic sources contribute the largest proportion of new labour market entrants, immigration is projected to account for all net labour force growth in Canada within the next decade and all population growth within the next two decades."¹³ International recruitment strategies targeting both the quantity and quality of talent are needed to address Canada's future shortfalls in the human capital needed to compete in the knowledge economy.

A recent survey of Canadian corporate executives suggested that many companies are facing challenges in finding available, qualified employees. Nearly one third of these executives strongly agreed that labour shortages are preventing their companies from growing.¹⁴ The ability to recruit top talent will continue to be a priority for companies across Canada in the years to come. This need for talent is especially evident among certain skilled occupations. In its 10-year outlook for the Canadian labour market, Human Resources and Skills Development Canada (HRSDC) has projected shortages in several occupational groups, including the health sector; business, finance and administration; and the natural and applied sciences and related occupations.¹⁵ According to the 2009 UNESCO *Global Education Digest*, compared to local students, a higher proportion of all internationally mobile students are enrolled in fields of study such as business, science, and engineering.¹⁶ These international students are ideally positioned to help meet skilled labour needs in areas of high demand within Canada's economy.



Toronto Financial Services Alliance: Linking talent to employment

Canada's financial services institutions have a global presence in locations such as Asia, Europe, Latin America and the United States. The nation has an international reputation as the soundest financial system in the world. Within Canada, Toronto is the country's financial capital, accounting for two thirds of financial services employment in the province and approximately 20 percent of the city's GDP.

The Centre of Excellence (CoE) in Financial Services Education of the Toronto Financial Services Alliance works collaboratively to strengthen the talent pipeline for financial services in the region. This supports economic development and addresses talent requirements of employers. The CoE aggregates information on the skills, knowledge and capabilities needed by individuals for key roles identified by employers and disseminates this information through its Career Advisor portal. Links from the portal to educational institutions and professional associations serve to inform job seekers of the courses and programs relevant to employers' needs.

According to CoE Executive Director Dr. Catherine Chandler-Crichlow, "An international education strategy is not only good for attracting the best and the brightest to study in Canada, it is also integral to the sustained economic development of its sectors locally and globally."

We are confident that international students choosing to remain in Canada after graduating from our post-secondary institutions constitute a desirable source of qualified immigrants who are capable of integrating well into Canadian economy and society. They are an excellent pool of highly qualified and skilled persons who can meet our current and future labour market needs. On the other hand, those graduates who choose to return to their home country will have the skills to contribute to the global supply of human capital, while retaining a valuable connection to Canada. For Canada, these are both positive outcomes that strengthen our economy and reinforce our international mind share.

“Foreign students make a far more valuable contribution to our country than most of us realize. They pay a premium to attend our institutions, where they expose Canadian students to international perspectives and ways of doing things. Because studying abroad demands a major commitment by the students and their families, they are serious about learning and often raise the educational bar at the institutions they attend. And they are a valuable source of skills for Canadian businesses—speaking the language, being trained on Canadian equipment to Canadian standards, and understanding our culture—all the while offering potential employers a link back to their own countries and cultures.”

The Honourable Perrin Beatty
President and Chief Executive Officer
Canadian Chamber of Commerce

CHAPTER 3: Context for Our Recommendations

Federal, provincial/territorial and private entities are all involved in the promotion of Canada as a destination of choice for study and research. Over the years, each actor has developed their own approach, with or without a vision for the whole.

3.1 Importance of provincial/territorial jurisdiction

As provinces/territories have jurisdiction over education in Canada, we recognized them as key partners with the Government of Canada in developing the strategy. The Advisory Panel Chair engaged with representatives from ministries of education/higher education from all 10 provinces engaged in international education. These discussions provided insight into the varying level of involvement and priorities of each provincial government in international education, and indicated their desire to continue collaborating with the federal government on the international education strategy. In addition, working-level representatives were invited to attend round tables in their respective regions as observers, and senior officials were invited to the collaboratory. The panel also exchanged with the Council of Ministers of Education, Canada, as appropriate, especially via the Advisory Committee of Deputy Ministers of Education. On a go-forward basis, we trust that CMEC will continue to play a central role in charting the course related to provincial or territorial approaches to quality assurance.

In June 2011, CMEC published an international education marketing action plan, entitled Bringing Education in Canada to the World, Bringing the World to Canada: An International Education Marketing Action Plan for Provinces and Territories. This action plan, developed by provincial/territorial ministers of education in response to the Council of the Federation, focuses on international student recruitment and retention as well as mobility for Canadian students, with attention given to the important role of federal-provincial/territorial collaboration.

The action plan's desired outcomes are:

- *a greater number of international students studying in Canada;*
- *an increased share for Canada of the international student market;*
- *more opportunities for Canadian students to study abroad; and*
- *a greater number of international students choosing to remain in Canada as permanent residents after graduation.*

The action plan is described as the basis of a pan-Canadian international education marketing action plan and recommends that provincial/territorial ministers responsible for education and for immigration, to the fullest extent possible within the context of existing resources, begin work immediately to implement the plan.

In its essence, the proposed strategy that we are recommending is aligned with the basic principles and outcomes of the CMEC's action plan.

Building on solid foundations: what has Canada achieved so far?

3.2 Contributions of the federal government

3.2.1 Foreign Affairs and International Trade Canada

The mandate of DFAIT is to promote Canada abroad and to defend Canadian interests and values on the international stage. DFAIT's work includes providing strategic directions and intelligence, as well as engaging and influencing international counterparts, delivering international programs and maintaining key networks abroad in a whole-of-government approach. Within its mandate, international education is considered an important diplomacy and trade sector.

3.2.1.1 Edu-Canada

Based on briefings provided to us by DFAIT to inform our work, we learned about the current engagement and achievements of the federal government in international education.

In 2007, the Government of Canada announced the establishment of an international education promotion initiative, funded with \$1 million per year over five years. Dubbed "Edu-Canada", it leveraged DFAIT's network of embassies and offices abroad to undertake promotion efforts and attract more international students to Canada. Under the Edu-Canada pilot project, DFAIT also entered into a partnership with the provincial and territorial governments via CMEC. Together, they have launched and jointly manage Canada's education brand.

DFAIT, it should be noted, has always facilitated the promotional efforts of provinces/territories, education associations as well as institutions abroad.

In its first five years, Edu-Canada achievements include:

- Creating a new education brand for Canada, *Imagine Education au/in Canada*, developed in partnership with provincial/territorial governments;^v
- Setting priority markets (in consultation with provincial/territorial governments);
- Launching a marketing campaign in priority markets, using the brand;
- Enhancing client service through the creation of an online portal ([Edu-Canada PRO](#)) for market intelligence;
- Increasing the international use of Canadian curricula; and,

^v In 2008, deputy ministers of education of all provinces/territories, working closely with DFAIT, approved by consensus the proposed pan-Canadian education brand concept called *Imagine Education au/in Canada*, to be jointly managed by DFAIT and CMEC, on behalf of the provinces/territories. Canadian missions abroad and provinces/territories have access to all the branded promotional tools, whereas eligible Canadian institutions and non-government organizations have access only to the logo. Some provinces/territories use the brand platform in their own promotion, and more than 120 institutions have already applied to sign the sub-licence and use the brand logotype.

- Increasing institutional agreements to facilitate two-way student mobility via Edu-Canada's leadership in organizing Canada pavilions at signature events as well as focused bilateral or regional round tables.

More specifically, from 2007 to 2012, Edu-Canada's goals included:

- Increase international students to Canada by 20 percent
 - Achieved, with a 36 percent increase from 2007 to 2011
- Increase international use of Canadian curricula by 10 percent
 - Achieved, with a 41 percent increase from 2006 to 2011
- Increase number of agreements facilitating two-way student mobility
 - Achieved via bilateral round tables and trade show event profile

In 2011, Edu-Canada organized 170 education promotion events in 95 countries and participated at six of the most prominent trade events for education partnership, showcasing Canada to an audience that totalled more than 100,000. As of March 2012, there are 10 full-time education officers as well as shared resources distributed across 123 countries. The embassies and consulates play a key role in organizing *Imagine Education au/in Canada* regional tours, outreach activities, participation in third-party events, and provide tremendous support to Canadian institutions and education associations looking for partners or greater market intelligence. This coordinated approach has been most effective in leveraging resources and authoritative roles to launch and implement the early stages of Canada's education brand initiative.



The Canada booth at the 2012 Conference of the Americas on International Education in Rio de Janeiro, Brazil.
Photo courtesy of DFAIT.

3.2.1.2 Policy and planning

The Policy and Planning Unit within DFAIT's International Education and Youth Division provides leadership in Canada's bilateral and multilateral relations in international education. It also coordinates the negotiation, signing and ratification of instruments of co-operation on education-related issues with different states and international organizations.

The unit implements the Canada-India Memorandum of Understanding (MOU) on Higher Education Co-operation, signed in June 2010, to encourage continued co-operation between institutions of higher education based on each country's academic, scientific and education needs.

In the context of Canada's engagement with the Americas, on August 30, 2010, Canada signed an MOU with Brazil in the area of academic mobility and scientific co-operation. A first program, the Canada-Brazil Awards: Joint Research Projects, was launched for uptake in the 2011–12 academic year.

Canada has a number of other instruments of co-operation in education, including with China, Europe, Mexico and the United States.

3.2.1.3 International scholarships

DFAIT funds scholarships to attract international students to Canadian institutions, to promote brain circulation to Canada and to create institutional linkages (approximately 700 a year). DFAIT's international scholarships are structured to advance Canada's foreign policy and target allocations to Canada's priority regions.

They include the Emerging Leaders of the Americas (including all programs drawing funding from it, such as the Canada-Brazil Awards: Joint Research Projects), the Canada-CARICOM [Caribbean Community and Common Market] scholarship programs (including the full suite of component awards such as the Canada-Haiti Scholarship initiative), the Canada-Chile Leadership Exchange Program, the Canada-China Scholars' Exchange Program (CCSEP) and the Fulbright Program.

Further, the federal granting agencies administer the prestigious Vanier CGS and Banting Postdoctoral Fellowships. These fellowships are open to Canadian citizens/permanent residents and international students.

3.2.1.4 International Experience Canada

DFAIT's International Experience Canada (IEC) initiative negotiates bilateral youth mobility arrangements and agreements with foreign countries. These instruments aim to simplify the process for Canadian and foreign youth aged 18–35 to travel and work in another country for up to one year.

To date, Canada has 32 bilateral youth mobility arrangements and agreements with countries and territories. IEC also facilitates university and college co-op education-related inter-institutional agreements for work placements in Canada and various countries, and works with a number of private Canadian businesses and bona fide international organizations that facilitate cultural exchanges for youth. Canadian embassies and offices abroad administer the IEC program for foreign applicants, while foreign embassies and consulates administer the program for Canadians.

International and Canadian youth who travel and work in Canada or other countries under the IEC program acquire a better understanding of each other's country, language(s), culture and society, building greater people-to-people ties between Canada and other countries.

In 2010, nearly 57,000 young adults from around the world came to Canada under IEC, which represented approximately one third of temporary workers in Canada under CIC's Temporary Foreign Worker Program. Many foreign IEC participants also attend short-term language courses while in Canada and some return to Canada following their IEC participation to engage in post-secondary education. Additionally, foreign IEC participants establish their own network of contacts while in Canada, which helps strengthen linkages between Canada and its partner countries, and potentially create future links for Canada in the area of global trade and commerce.

3.2.2 Other government departments and agencies with a role in international education

3.2.2.1 Citizenship and Immigration Canada

CIC manages the international students program in terms of permits and visas. CIC has created programs such as the Off-campus Work Permit Program and the Canadian Experience Class that enable international students to gain work experience during their studies and to potentially remain in Canada after they graduate. These programs are important components of the international education strategy, as the option to work while studying in Canada is attractive for international students and researchers.

3.2.2.2 Canada Border Services Agency

The Canada Border Services Agency (CBSA) is responsible for examining international students seeking entry at Canadian ports of entry and issuing study permits when all eligibility requirements are met. As the CBSA is responsible for enforcement matters within the *Immigration and Refugee Protection Act* and *Immigration and Refugee Protection Regulations*, the agency monitors compliance and conducts investigations that may result in subsequent removal from Canada of those found in violation of the legislation.

3.2.2.3 Human Resources and Skills Development Canada

Human Resources and Skills Development Canada encourages international students to study in Canada through the promotion of international educational opportunities and partnerships. These activities support Canada's efforts to secure the skills it needs to respond to current and future labour market demands.

HRSDC also encourages Canadians to study abroad. Canadian students are eligible to receive Canada Student Loans and Grants for study throughout Canada and abroad at accredited post-secondary education institutions. In 2010–11, approximately 2.5 percent of CSL recipients (more than 10,000 students) studied abroad.

Both Canadian and international students can benefit from visiting HRSDC's website [Working in Canada](#), which offers tailored learning and labour market information that can provide a better understanding of Canada's labour market, including licensing and certification information.

3.2.2.4 Canadian International Development Agency

Basic education continues to be at the forefront of Canada's official development assistance and accounts for the majority of CIDA's investment in the education sector. CIDA's Children and Youth Strategy includes a component that focuses on access to quality education for all children, particularly girls.

CIDA also supports linkages between Canadian universities and post-secondary institutions in developing countries through the University Partnerships for Co-operation and Development and other programs.

In addition, CIDA funds scholarships for nationals of the 37 developing country members of La Francophonie to take up short-term post-secondary studies in Canadian institutions. The Canadian Francophonie Scholarship Program is managed by the AUCC.

CIDA provides funding for the Education for Employment (EFE) program to strengthen the technical and vocational education and training sector. The five-year EFE program is implemented by the ACCC with key government and non-government stakeholders in the Andean region including Colombia, Peru and Bolivia; the CARICOM states; and, in Africa, in Senegal, Tanzania and Mozambique.

3.2.2.5 Industry Canada

Consistent with its mandate in science, technology and innovation, Industry Canada has an interest in strengthening Canada's ability to attract the world's top graduate students and post-doctoral fellows as part of the federal government's efforts to make Canada a global centre of excellence in research, innovation and higher learning.

The three federal granting agencies—NSERC, SSHRC and the CIHR—administer the prestigious Vanier CGS and Banting Postdoctoral Fellowships. Both of these programs are open to Canadian citizens/permanent residents and international students. While the Vanier CGS must be held at Canadian universities, a limited number of Canadian recipients may hold the Banting Fellowship at a foreign research institution.

The Natural Sciences and Engineering Research Council and the Social Sciences and Humanities Research Council report to Parliament through the Minister of Industry, whereas the Canadian Institutes of Health Research is accountable to Parliament through the Minister of Health.

3.2.2.6 International Development Research Centre

A Canadian Crown corporation established in 1970, IDRC is guided by an international board of governors and reports to Canada's parliament through the Minister of Foreign Affairs. IDRC is among the world's top 10 funders of development research.

Effective December 1, 2012, IDRC will have four regional offices, in Nairobi, Kenya; Cairo, Egypt; New Delhi, India; and Montevideo, Uruguay.

IDRC's main internal divisions are Agriculture and Environment, Global Health Policy, Science and Innovation, and Social and Economic Policy.

3.3 Current contributions of all partners and stakeholders

3.3.1 Provinces/territories

Provinces/territories are active in international education and have formulated the aforementioned action plan related to international activities.

Provincial/territorial governments invest in their own internationally focused initiatives that promote study and research within their own jurisdiction. They provide the regional incentives for students to choose their province/territory. Some provinces/territories contribute funds by investing directly in scholarships for international students to study in Canada or for domestic students to study abroad. For example:

- In 2010, Ontario announced the Ontario Trillium Scholarship (OTS) program, which provides 75 students with \$40,000/year for up to four years to pursue doctoral studies at an Ontario university. The province is investing \$20 million during the initial four years of the program (with participating universities contributing a further \$10 million).
- According to officials from Alberta, that province offers 400 grants for study abroad, each valued at \$1,500 plus an additional \$500 for travel.

Provinces/territories also contribute by supporting the enrolment of international students in their institutions through their respective funding mechanisms. We learned that Nova Scotia, for example, provides funding for international students at the institutional level of 10 percent of undergraduate enrolment, and 30 percent of graduate enrolment (limits above which international students will not be supported by public funding).^{vi} At times, they also support institutions' participation in promotional fairs.

vi During a meeting with representatives from the Government of Nova Scotia, Labour and Advanced Education, the panel found out that this formula, which provides funds to support up to 10 percent international students (as a proportion of total undergraduate enrolment) or 30 percent of international students as a proportion of total graduate student enrolment, is currently under review (December 7, 2011).

Other contributions are in the form of support for provincial/territorial education associations such as EduNova (in Nova Scotia) and the British Columbia Council for International Education (BCCIE), which promote international education activities in their respective provinces. Provincial/territorial governments (and in some cases, regional associations) are also active abroad through the establishment of branch offices, such as the Alberta Education Centre in Guadalajara, Mexico, and the EduNova Gulf office in Abu Dhabi, United Arab Emirates. Provinces such as British Columbia and Quebec may also leverage their international trade offices (or immigration offices in the case of Quebec) to promote education in their respective institutions.

EduNova: Facilitating internationalization at the provincial level

EduNova Co-operative Ltd. was founded in 2005 and opened in October 2006 as a Nova Scotia-based not-for-profit, co-operative association of education and training providers. Shareholders include the Department of Education, the Department of Labour and Advanced Education, the seven English school boards, language schools, the 13-campus Nova Scotia Community College, 11 universities and several private consulting firms. EduNova has played a significant role in promoting Nova Scotia as a study destination and as a partner in international projects.

The organization has two primary areas of business: to facilitate international student recruitment and international contract work. To date, the results speak for themselves: Nova Scotia's international student enrolments have increased by 44 percent since 2007, with a total of 7,567 international students studying in member organizations throughout the province. A concerted effort aimed at retaining international students in the K-12 sector for post-secondary studies has seen the retention rate escalate from 28 percent (2007) to 42 percent (2011). In addition, the shareholders are actively engaged in the organization, meeting more than 100 times with quorum since 2006 and participating in more than 44 out-bound student recruitment missions, 15 in-bound familiarization tours and 16 student-retention events.



The Honourable Darrell Dexter, Premier of Nova Scotia (third from left), and Ava Czupalay, President and CEO of EduNova (second from left) visiting the EduNova Gulf office in Abu Dhabi.

Photo courtesy of EduNova.

British Columbia announced in September 2011 the goal of increasing international student enrolment by 50 percent over four years. On May 28, 2012, the province released its international education strategy to support this goal.¹⁷ In 2010, the Government of Saskatchewan named an international education council to enhance co-operation between various educational institutions regarding international student recruitment and the promotion of global citizenship.¹⁸

The provinces/territories have control over allowing the creation of a curriculum school abroad. These schools can act as a pathway to education in Canada in that the students at curriculum schools abroad can choose to pursue their higher education studies in Canada. Given their prominence in showcasing Canada abroad, it is imperative that the standards of excellence in Canada be maintained in these schools. In China alone, there are currently 56 curriculum schools that help raise visibility for Canada among the students and their parents.^{vii}

vii The number of curriculum schools abroad is according to Canadian Information Centre for International Credential's *Directory of Canadian Elementary and Secondary Schools outside Canada*, available online at www.cicic.ca.

British Columbia Council for International Education: Providing leadership in British Columbia's international education sector

The British Columbia Council for International Education represents the international education interests of the public and private, government-accredited K-12, post-secondary and English language sectors in British Columbia. The BCCIE provides coordinated leadership for B.C.'s international education sector. It is responsible for administering Education Quality Assurance (EQA), Canada's first and only provincial brand of quality for post-secondary education. The BCCIE also provides market support by positioning B.C. as a leading quality destination for international learners; offers professional training, and core services to international educators; and promotes a culture of quality and excellence in internationalization.

"Our core activities have contributed to the advancement of the international education sector in B.C. and ensured best practices are upheld in our professional community. Organizing activities such as the annual Summer Seminar conference encourages knowledge sharing among educators. We have coordinated visiting education delegations, and provided support for government-led missions, to help build and nurture international partnerships. Our administration of EQA on behalf of the province is a key pillar to our work, and continues to provide value to B.C.'s post-secondary sector by ensuring one standard provincial seal that can be recognized globally as a symbol of quality. Adding to the breadth of our service offerings, we recently launched StudyinBC.com, an interactive, student-focused online resource for study options in B.C. It is the only directory covering all regions and types of institutions in the province. We continue to work alongside schools, school districts and institutions to capture the B.C. international student experience," says Colin Doerr, Director of Communications and Programs for BCCIE.



Photo courtesy of the BCCIE.

3.3.2 Education associations

We met with a variety of stakeholders (education associations and institutions) in the education sector at the regional, provincial and national levels (please see Annex C for a list of stakeholders in the Canadian education community). The education associations often organize activities to support the internationalization efforts of their members, such as international delegations and forums to support their member institutions in the establishment of partnerships with foreign institutions. National associations also provide effective communications channels for disseminating information among their members, conduct research and analysis to inform their members' activities, and regularly convene their membership. They also provide professional development workshops and, in some cases, quality-assurance mechanisms.

Several national associations also maintain an international presence through the establishment of offices abroad. For example, ACCC has regional offices in China, India, the Philippines and the United Kingdom. The World University Service of Canada (WUSC) has established offices in Burkina Faso, Botswana, Malawi, Sri Lanka, Vietnam and Peru, as well as strong chapters in campuses across Canada.

National associations contribute to the whole-of-Canada marketing approach by supporting the international recruitment and partnership work of their member institutions based across the country. In some cases, associations are able to undertake international activities with the help of funding from DFAIT's Global Opportunities for Associations (GOA) program, which provides contribution funding to support national associations undertaking new or expanded international business development activities in strategic markets and sectors.



Association of Universities and Colleges of Canada: Leveraging synergies between Canada and Brazil

Led by Governor General David Johnston, a delegation of some 30 university presidents organized by the AUCC were in Brazil from April 25 to May 2, 2012. They met with Brazilian university rectors, participated in the 2012 Conference of the Americas on International Education, visited world-class research facilities, toured university campuses, and met with key government and private-sector stakeholders and funding agencies. During this visit, Canadian universities announced more than 75 formal partnerships, agreements and scholarship programs worth more than \$6.7 million.

The size, seniority and scope of the mission made a significant impact in Brazil, generating substantial press coverage in Brazil and highlighting the excellence of Canadian higher education to position Canada as a partner of choice in higher education, research and innovation.

Following a meeting with the Governor General, Brazilian President Dilma Rousseff announced that Canada will be allocated up to 12,000 students under the Science Without Borders program. Canada is thus set to receive the second-largest delegation of Brazilian students in the world. Brazil is looking to Canada for excellence in academic, research and work experience for their students. "There are clear synergies between our two countries in important areas of research and discovery," says Paul Davidson, AUCC president. "The strategic investments announced during this mission will help drive trade, build prosperity and enhance quality of life in both Canada and Brazil."

3.3.3 Education institutions

Internationalization is a priority for Canadian institutions. While the level of engagement in international activities may vary among institutions, individual efforts contribute to the greater collective's objectives of the international education strategy. There is a qualitative difference in how undergraduate and graduate students are recruited, a factor that should be considered in the development of the international education strategy.

Institutions across Canada have realized the benefit of a coordinated approach for Canada in their targeted activities. Of note, the Canadian Higher Education Committee, which serves more than 40 Canadian universities within the Council of International Schools (CIS), coordinates targeted undergraduate tours for top students in key markets: Latin America, India and the Middle East. The committee develops conference sessions and material to support information exchange for international students and counsellors of international schools, to better promote opportunities for university education in Canada.

A group of recruiters from a number of Canada's business schools have recently begun working together to promote Canada as a destination for pursuing a high-quality MBA. The goal of this effort is to increase the number of potential applicants considering Canada as a destination for studies in business. These are the kinds of coordinated, institutionally driven initiatives that contribute to stronger recognition of Canada around the world.

University of Manitoba: Investing to attract talented Brazilian graduate students

The University of Manitoba signed an MOU with the Brazilian Federal Agency for Support and Evaluation of Graduate Education (CAPES). CAPES is administering 100,000 student scholarships under the Science Without Borders program. The University of Manitoba will position itself to become an institution of choice for Brazilian graduate students. “Knowledge and talent knows no borders. We are proud to make historic investments to ensure Brazilian graduate students recognize they are welcomed and valued in Manitoba,” says David Barnard, President, University of Manitoba. Under the five-year agreement signed with CAPES, the University of Manitoba will invest up to \$880,000. The funds will help cover the costs of tuition fees and English language education. The investments will be used to attract 20 Brazilian doctoral or masters students annually, starting in 2012–13.

The University of Manitoba recognized that the high quality of Brazil’s universities provided an opportunity to attract qualified students who would be eligible for the SWB scholarships. Manitoba already has several strong partnerships in Brazil. In April, these were strengthened by signing an agreement with the State University of Campinas (UNICAMP) in Campinas, which is home to a research collaboration focusing on community-based resource management and food security in coastal Brazil.

Selkirk College: Providing valuable learning experiences through partnership

A red, three-storey sign proclaims the Sino-Canadian Selkirk College at Taiyuan Normal University (TNU) on a TNU building in Taiyuan, China. The building is home to a three-year English diploma program that focuses on business and tourism English. This program is the result of collaboration between TNU and Selkirk College that began in 2010. TNU develops and delivers the curriculum, and prepares the students for the English leaving test that all Chinese students are required to write. It also manages all logistics for the program, including student and faculty recruitment. Selkirk College provides curriculum expertise, faculty professional development, and an annual placement assessment for each student as required by Selkirk’s English Language Program (ELP). Through this partnership, TNU benefits from access to native-language English teachers, faculty professional development, and a supported transition to Selkirk College for students who wish to study in Canada. In return, Selkirk College TESOL (teaching English to speakers of other languages) graduates have an opportunity for an international practicum and paid faculty working experience in China. As well, the college is building a stream of educated, well equipped international students for its post-secondary programs in British Columbia. An additional benefit has been the development of an online placement testing tool that is used by all ELP students at Selkirk. Today, more than 700 Chinese students are registered in the program, with the first TNU students expected at Selkirk College in September 2012.

“Partnerships, like this one with Taiyuan Normal University, provide many benefits to the partner institutions but, more importantly, they provide wonderful learning experiences for students, instructors and communities in both countries,” says Neil Coburn, Vice-President–Education and Students, Selkirk.



Photo courtesy of Selkirk College.

Canadian institutions allocate substantial funding for the provision of scholarships and grants to international students and researchers. For example, the University of British Columbia, a very active institution, internationally speaking, devotes more than \$4 million annually to awards, scholarships and other forms of financial assistance for international undergraduate students.¹⁹

A significant institutional contribution is the work of institutions to develop policies and practices that facilitate internationalization. An example is the establishment of international research collaboration projects or partnerships with foreign institutions to provide joint degrees. Another example is the articulation of credit recognition agreements with foreign institutions that facilitate study abroad.

Knowledge exports (i.e. the provision of education products and services by Canadian post-secondary institutions overseas) are an increasingly important area of activity that bring economic value to the education sector and constitute an integral part of efforts by Canadian institutions to internationalize their campuses. For example, the University of Waterloo's campus in the United Arab Emirates offers a 2+2 program, which requires two years of study at the branch campus followed by two years of study at the home institution in Canada.²⁰ These programs can facilitate entry into Canada for international students by allowing them to demonstrate their commitment to the completion of their academic program. Many institutions also export their curriculum or deliver entire programs abroad.

Northern Alberta Institute of Technology: Sharing Canadian training expertise

As one of Canada's leading polytechnics and the country's largest apprenticeship trainer, the Northern Alberta Institute of Technology (NAIT) prides itself in being relevant and responsive. For the past 50 years, students have benefited from hands-on, technology-based teaching programs.

When the opportunity arose in 1999 to partner with CIDA and participate in developing Cuba's National Industrial Certification Centre (CNCI), NAIT responded. The program, facilitated by Cuba's Ministry of Basic Industry, has positively affected Cuba's pursuit of sustainable economic growth.

With instructor training in Cuba and at NAIT in Edmonton, and the provision of state-of-the-art equipment for CNCI laboratories and shops, the partnership has improved and enhanced skill levels in Cuba's workforce. NAIT president and CEO Dr. Glenn Feltham notes that the partnership has far-reaching benefits: "By bringing a successful Canadian learning model and our expertise to Cuba, NAIT has raised the standard of trade skills within Cuba, but more importantly we are bringing Canadian values to Cuba."

Between 2000 and 2010, approximately 1,200 Cubans achieved international certification, based on NAIT and Alberta curriculum, from among the more than 16,400 CNCI graduates. NAIT's partnership with CIDA has served to elevate teaching standards at CNCI and strengthen Cuba's Ministry of Basic Industry in advancing a diverse, inclusive and skilled workforce.



Cuba's National Industrial Certification Centre.
Photo courtesy of the Northern Alberta Institute of Technology.

Similarly to some provinces/territories and associations, Canadian institutions are working to better serve and attract international students by establishing offices and counselling centres abroad. For example, Toronto's Centennial College has seven satellite international offices around the world, including an international education office in Bangalore, India, which offers free counselling regarding programs at the college and answers questions about study permit applications.²¹

3.3.4 Private-sector and individual contributions

We recognize that industry in Canada also plays a valuable role in international education efforts, and we see this as a role with great potential for expansion. A variety of companies in Canada may offer internship opportunities to qualified international students with work permits or internships abroad for Canadian students. For example, international graduate students or post-doctoral fellows at more than 50 research-based Canadian universities are eligible to participate in an internship under the Mitacs-Accelerate program. This program, administered by Mitacs and supported by funding from the Government of Canada's Industrial Research and Development Internship (IRDI) program, connects companies in Canada with interns in a variety of disciplines and industry sectors to apply their specialized expertise to business-related challenges.

There are also individuals or private organizations that choose to make donations or provide sponsorships to education institutions or associations to fund international scholarships, either to provide awards to international students coming to Canada or to support Canadian students going to study abroad.

Supporting Japanese students with private contributions

In 2011, Languages Canada launched the Hope for Youth (HFY) scholarship program for Japanese students affected by the Great East Japan Earthquake. With the support of DFAIT, HFY brought 150 Japanese students to Canada. HFY received \$1.5 million in contributions from LC members as well as Air Canada, GuardMe insurance and Samantha Thavasa Japan Limited.

Mr. Kazumasa Terada, President of Samantha Thavasa, is also a founding sponsor of the Canada-Japan Leadership Fund. Mr. Terada is a prime example of the impact of international education for Canada. He attributes part of his success in business to his studies in Canada and is now supporting Japanese students affected by the earthquake rebuild their lives through a Canadian educational experience. These efforts helped Canada gain new status in Japan. Recently, the Ryugaku Journal, an influential English-language Japanese magazine, selected five Canadian language education providers in its top 10 list from around the world. In recognition of the success of the HFY initiative, the Honourable Ed Fast, Minister of International Trade, presented one of the first HFY scholarships to a Japanese student in October 2011 in Shioyama, Japan.



The Honourable Ed Fast, Minister of International Trade and Minister for the Asia Pacific Gateway, presents 16-year-old Mako Matsukawa with one of the first Hope for Youth scholarships, which were established by the Embassy of Canada to Japan.

Photo courtesy of Languages Canada.

Organizations such as banks may also enter into partnerships that facilitate studying in Canada for international students. An example of this is the CIC's Study Direct Stream for qualifying study permit applicants in China. Under this stream, students with English language proficiency who have been accepted to designated colleges or universities may submit a guaranteed investment certificate (GIC) from a participating financial institution (currently only Royal Bank of Canada and BMO Bank of Montreal) in place of most financial documents when applying for a study permit. This can make applying to study in Canada easier for international students by reducing the number of documents that need to be submitted.

Initiatives such as these with private partners to provide services and support for international students can make valuable contributions to the internationalization goals of Canadian institutions.

3.4 Dovetailing with previous expert panels

It is important to note that we are not alone in looking at the issues of education, labour market needs and fostering greater innovation for the country. The need to attract and develop top talent has also been raised by previous panels. Our recommendations chart a possible course for Canada that follows the road paved by expert panels before us, including the Expert Panel for the Review of Federal Support to Research and Development, the Competition Policy Review Panel, and the Expert Panel on Commercialization. Salient conclusions from these panels are outlined in Annex A.

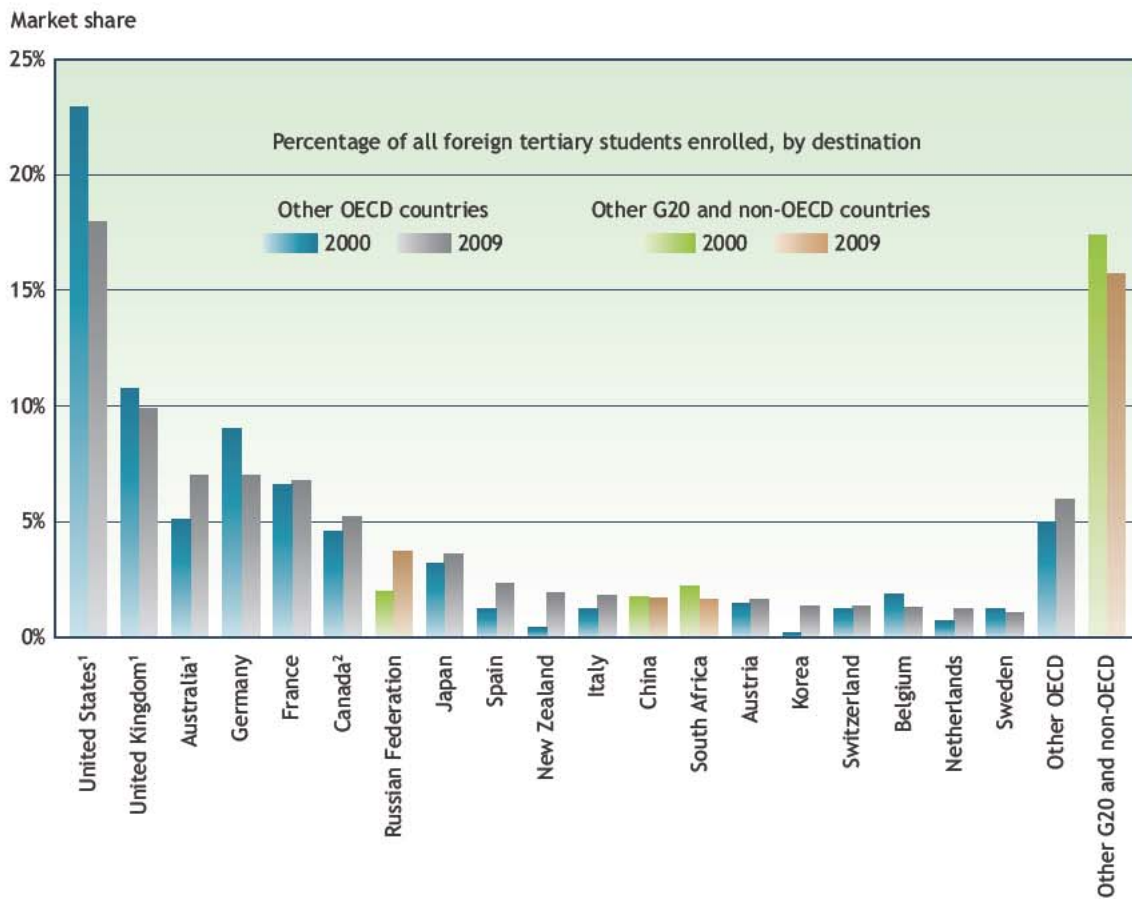
3.5 Environmental scan: The international education landscape

In setting the stage for making our recommendations, it was important for us to look beyond the achievements and progress that Canada has made to gain an understanding of the international education market as a whole. In 2009, nearly 3.7 million students worldwide were pursuing tertiary education outside their country of citizenship.²² A recent projection suggests that this number could increase to 6.4 million students in 2025.²³ According to the OECD, 5 percent of all the tertiary students who study abroad choose to do so in Canada.²⁴ The table on the next page illustrates changes in international education market shares in major destination countries. Canada is the fourth most popular of all English-speaking destinations, behind the United States (18 percent), the United Kingdom (10 percent) and Australia (7 percent), and second in French-speaking destinations, after France (7 percent).²⁵ As Canada continues to deepen its engagement in international education, we must acknowledge and learn from the efforts of other countries active in the sector.

Our initial understanding of the international education landscape came from a benchmark study commissioned by DFAIT in 2009, [Best Practices on Managing the Delivery of Canadian Education Marketing](#). The report provided a detailed overview of the international promotion of education by several highly competitive destination countries: Australia, France, Germany, New Zealand, the United Kingdom, and the United States. With the findings of this report as a baseline, we sought to assess more recent developments among competitor countries in the international education market.^{viii}

viii For additional comparative metrics with key competitor countries, refer to Annex C.

Trends in international education market shares (2000, 2009)



¹ Data relate to international students defined on the basis of their country of residence.

² Year of reference 2008.

Countries are ranked in descending order of 2009 market shares.

Source: OECD and UNESCO Institute for Statistics for most data on non-OECD countries. Table C3.6, available on line.

See Annex 3 for notes (www.oecd.org/edu/eag2011).

3.5.1 United States

The United States continues to be the world's leading destination for international students, hosting over 720,000 of them in 2010–11.²⁶ International promotion of education in the United States is done by EducationUSA, a global network of advising centres supported by the Bureau of Educational and Cultural Affairs at the U.S. Department of State.²⁷ The U.S. government remains active in its efforts to maintain and increase its international student population. In September 2011, the Department of Homeland Security launched the Study in the States Initiative, which will examine and streamline the U.S. international student visa process.²⁸ The initiative also includes a comprehensive interactive website with links to a variety of social media tools. This is part of a broader, government-wide effort to attract and retain international talent to the United States, which includes reforms to support and employ international students in the science, technology, engineering and math fields.²⁹ Also, the Homeland Security Academic Advisory Council, composed of university presidents and academic leaders, was established in March 2012 to advise the government on a range of issues including international students.³⁰

The U.S. government also maintains substantial support for international mobility opportunities for students, particularly through its flagship Fulbright Program. In 2011, funding of more than US\$230 million (\$236 million)^{ix} was appropriated to the Fulbright Program.³¹ The program provides awards for both American students to study abroad and for international students going to the United States. Since it was created in 1946, the program has supported over 310,000 scholars.³²

3.5.2 United Kingdom

Many international students choose the United Kingdom as a destination for its long history of prestigious institutions and its strong Commonwealth ties. The second Prime Minister's Initiative for International Education (PMI2), launched in April 2006, set out a five-year strategy that contributed to enhancing the United Kingdom's reputation as an international education provider. PMI2 projects and activities supported targets such as attracting 70,000 additional international students to U.K. higher education, improving student satisfaction, increasing institutional partnerships, and strengthening and achieving impact from existing partnerships.³³ Since 2006, the number of international students at U.K. higher education institutions has grown by nearly 30 percent to more than 420,000.³⁴ However, in recognition of the impact of international student growth on U.K. immigration levels, as well as instances of fraud by poor-quality colleges affecting legitimate students, the government has worked to overhaul its student visa system. Following a public consultation, changes to the system were announced in March 2011. These included the need for sponsoring institutions to be accredited, a higher English-speaking requirement, restrictions on work placements in courses outside universities, and the closure of the post-study work route (which allowed students two years to find employment after their course ended).³⁵ As of April 2012, new student visa rules were implemented with an emphasis on addressing abuse and supporting young entrepreneurs after their study.³⁶

3.5.3 Australia

Australia experienced significant growth in international student enrolment between 2006 and 2009, demonstrated by an increase of almost 65 percent during that time.^{37,38} However, the Australian government has acknowledged challenges the country has faced in recent years, from factors including "the high Australian dollar, the poor quality of some former [education] providers, changes to Australian visa requirements and reputational damage caused by a number of attacks on students in 2009," resulting in an overall decline in international student enrolment since 2010.³⁹

In response to these challenges, a series of government-initiated reviews have led to substantial reforms in Australia's international education sector. These reviews included the *Senate Inquiry into the Welfare of International Students*, the *Review of the Education Services for Overseas Students (ESOS) Act 2000* (the Baird Review), and the *Knight Review of the Student Visa Program*. Furthermore, in October 2011, Australia's Minister for Tertiary Education announced the establishment of the International Education Advisory Council to help the government develop a five-year international education strategy.⁴⁰ The advisory council recently launched its consultation process with the release of a discussion paper in April 2012.

Notably, in July 2010, the Australian government transferred responsibility for the international marketing of education from Australian Education International (AEI, in the Department of Education, Employment and Workplace Relations) to the Australian Trade Commission (Austrade). Similar to the Government of Canada's approach, the education promotion mandate for Austrade covers activities such as research and provision of market intelligence and services for Australian education providers, publishing information on Australian

ix Conversions to C\$ are based on Bank of Canada exchange rates as of June 27, 2012.

government scholarships, and managing the Study in Australia brand. However, AEI “will continue to lead strategic policy, regulation and government-to-government engagement in the international education sector.”⁴¹ This transition demonstrates Australia’s recognition of international education as an export industry; education services provided A\$16.3 billion (\$16.8 billion) in export income to the Australian economy, representing the country’s third-largest source of overseas earnings.⁴² Funding for Austrade’s international education promotion activities comes from the budget of nearly A\$190 million (\$196 million) allocated for its work in trade, education and investment promotion in 2012–13.⁴³

Despite the challenges it has faced, the Australian government continues to invest heavily in its efforts to attract top talent and form Australia’s image as an international education destination. A prime example of this investment is the Australia Awards initiative announced by the Australian government in 2009. In 2010, nearly 3,000 awards valued at more than A\$210 million (\$216 million) were offered to international and Australian recipients.⁴⁴

3.5.4 Germany

Germany is also a significant destination for internationally mobile students. In spite of recent declines, in 2010, there were approximately 181,000 international students at German institutions of higher education, representing 8.5 percent of the entire student body.⁴⁵ Germany’s success as a destination for international students was supported by the fact that its institutions did not charge tuition fees until 2006, and even in 2009, the highest tuition amount public German universities could charge was €1,000 (\$1,300) per academic year.⁴⁶ Germany should also be noted as a country that exemplifies the internationalization of education through its work to enable study abroad opportunities for German students. In 2008, over 100,000 Germans studied abroad, of whom 83 percent studied in other European countries.⁴⁷ Many of these students were supported by scholarships from the German Academic Exchange Service (DAAD), which provided €109 million (\$140 million) in funding for more than 31,000 Germans to study abroad in 2010.⁴⁸ According to the German government, approximately 30 percent of German students go abroad during their studies, and DAAD and the government aim to increase this proportion to 50 percent.⁴⁹

In addition to providing support for international opportunities for Germans, DAAD promotes the internationalization of German higher education and promotes German education abroad, among many other activities.⁵⁰ The majority of these activities are funded by the German federal government, which provided 80 percent of the €384million (\$494 million) budget for DAAD in 2010.⁵¹ The work of DAAD demonstrates a strong coordinated approach to the internationalization of higher education, regrouping internationalization at home, promotion abroad, international co-operation in developing countries, and the provision of scholarships for domestic and international students.

3.5.5 France

France remains a top destination for international students, attracting over 284,000 in 2010–11, which represented 12 percent of its total student population.⁵² France’s education offering is promoted internationally by *Agence CampusFrance*, a public institution that provides services for international students interested in studying in France through its network of offices and branches, called *Espaces*, in more than 100 countries.⁵³ The French government is working more broadly to enhance France’s attractiveness abroad, including efforts to bring in more international students and researchers.

Recently implemented initiatives include the creation of a national research agency and “poles [centres] of research and higher education” to enable institutions and research bodies to pool resources and activities, an increased budget for the French Ministry of Higher Education and Research, and increased autonomy of universities.⁵⁴

In 2009, the French Ministry of Foreign and European Affairs allocated €86 million (\$110 million) for scholarships to attract international students.⁵⁵ France's efforts to attract international students are supported by its long-standing ties to former colonies (particularly in Africa, which accounted for over 100,000 of international students in France in 2009), as well as the fact that its tuition fees are among the lowest in the world: the government defrays €10,000–14,000 (\$13,000–18,000) of the true cost per student per year at public institutions.^{56, 57}

France has identified several target markets for its international education activities, including Brazil, Russia, India and China (known as the BRIC countries) and other emerging countries, and countries providing scholarship programs for their students to go abroad, including Brazil, Mexico, Indonesia, Iraq and the Gulf States.⁵⁸ The country is also aiming to attract at least one third of its international students at the Master's and doctoral levels by 2015.⁵⁹

3.5.6 New Zealand

In September 2011, the New Zealand government released *Leadership Statement for International Education*. The report set out ambitious objectives for the next 15 years, such as doubling the economic value of education services to NZ\$5 billion (\$4 billion) by increasing international enrolments, doubling the number of international post-graduate students in New Zealand from 10,000 to 20,000, and increasing the transition rate from study to residence for international students with Bachelor's level qualifications and above.⁶⁰ To help achieve these targets, in its 2011 budget the government increased investment in international education promotion by NZ\$10 million (\$8.1 million) a year to a total of NZ\$13.45 million (\$10.9 million) annually.⁶¹

3.5.7 Malaysia

Malaysia is a powerful example of an emerging provider nation that has made a clear statement of its goals in the international education market. Although the country has been a major source of international students for other countries (having been one of Australia's top five nationalities of international student enrolment in 2011,⁶² and one of Canada's top 25 source countries over the last 10 years, for example), Malaysia is working to establish itself as an international education hub in its region. The Malaysian government has identified education as a national key economic area under its Economic Transformation Programme, with tertiary education (including international students) as one of its key priority segments. A target has been set to double Malaysia's international student enrolment (93,300 in 2011) and "to be the sixth-largest education exporting country globally in 2020 with 200,000 international students".⁶³ This goal is supported by initiatives to better brand Malaysia and raise awareness about education opportunities in the country, to enable top-tier students to seek employment in Malaysia, and to streamline international student visa application processes.⁶⁴ The Malaysian government also views the establishment of branch campuses in Malaysia by internationally recognized institutions as an opportunity to enhance its positioning as a major destination for international students.⁶⁵

Beyond these leading countries, many more nations are ramping up their engagement in the international education sector. These are only a few examples of the growing interest in several countries to establish themselves as regional hubs for international education—it will be important to continue to observe this trend in coming years.

It is clear to us that the internationalization of education is becoming a priority for governments and institutions around the world. While leading nations are re-evaluating their strategies in light of rising challenges, others are advancing their efforts to compete for the world's best and brightest students and researchers. We see this as an opportunity for Canada to define itself in the international education market. Further, we believe that with sustained investment and coordinated action, Canada can leverage its competitive advantages and build on the momentum gained in recent years and meet our vision of becoming the 21st century leader in international education.

CHAPTER 4: Themes for the Recommendations

We believe that Canada can only achieve its objectives when the federal government, the provinces/territories, education associations and institutions align their respective strengths under the same umbrella: Canada. We have reached a consensus that Canada's International Education Strategy should focus on a set of recommendations that can be categorized into five themes. The following chapters will each explore one of the themes and its related recommendations.

Chapter 5: Targets for success

Success target recommendations are at the core of the strategy. They focus on achievable goals for the growth of international student numbers as well as an increase in international mobility opportunities for Canadian students.

Chapter 6: Policy coordination and ensuring sustainable quality

One of the greatest challenges in international promotion of education in Canada is coordinating the efforts of various partners and stakeholders. These recommendations clarify the ongoing coordination mechanism and address the intrinsic value of quality of the education offering.

Chapter 7: Promotion of “Education in Canada”

Recommendations delve into practical issues related to education promotion efforts, including selecting priority markets in which to focus Canada's efforts, honing the “Canada” brand and ensuring we are effective and successful in our usage of new media.

Chapter 8: Investments

We need to be strategic in how we package our scholarship offering. As the strategy seeks to attract top talent, Canada must be competitive in recruiting the best and brightest international students. Scholarships are a key means to promote Canada's culture of excellence.

Chapter 9: Infrastructure and support

Promotional efforts must occur in alignment with study permit issuance. The remaining recommendations focus on the visa processing system as well as facilitating the process through a greater exchange of information and expertise between the Government of Canada and the education sector.

We recognize that international education brings tremendous value to every community in Canada. We believe that education is the most powerful means by which to shape minds and create opportunities for youth and by extension, to mould our society.

CHAPTER 5: Targets for Success

5.1 International student enrolment

Under our mandate to make recommendations on a strategy that will reinforce Canada as a country of choice to study and conduct world-class research, one of the areas we looked at during our deliberations was international student enrolment. As described previously, the provinces/territories have identified a greater number of international students in Canada as one of the expected outcomes of their international education marketing action plan. Throughout our engagement with the education field, we consistently heard that one of the overarching objectives for the international education strategy should be to position Canada as a leading destination for international students and researchers.

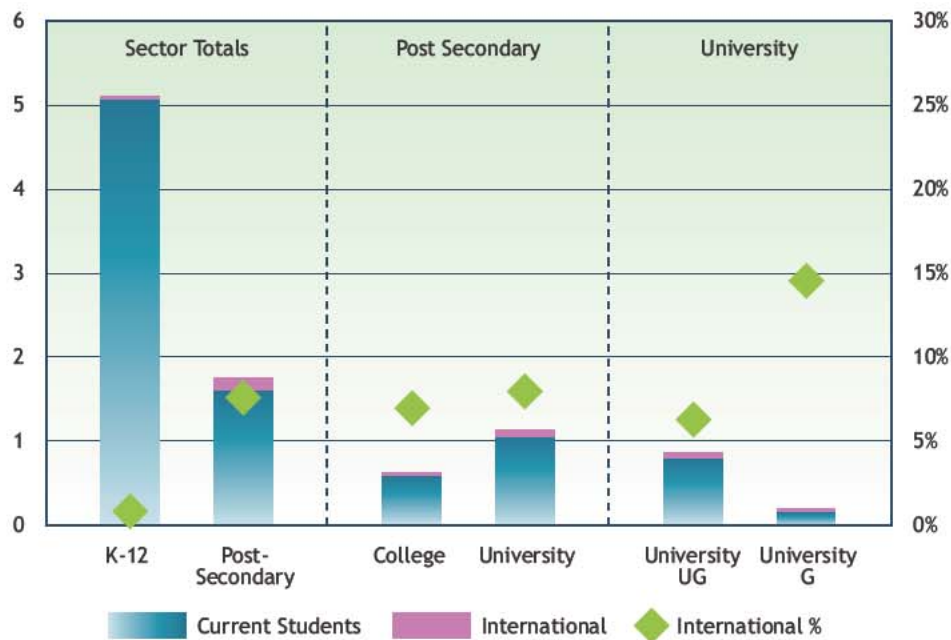
It was often repeated that Canada has the potential to support growing international student enrolment, and that the strategy should have a specific goal or target for this increased recruitment. However, the challenge lies in identifying a target for growth in international enrolment that will allow Canada to seize emerging opportunities while maintaining the quality of our education offering and the integrity of our visa system. We strongly believe that such a target should not aim for growth for the sake of growth, but should instead focus on a sustained, manageable growth that supports Canada's reputation for quality and excellence. Thus, most importantly, this target should focus on attracting the highest calibre of international students and researchers to Canada.

In order for us to better understand Canada's potential for future growth, a study was commissioned to assess Canada's capacity to absorb international students. It was critical for us to ensure that efforts to attract greater numbers of international students do not interfere with opportunities for Canadians to pursue a post-secondary education within Canada.

Looking at current enrolment and capacity levels, the study—*Canada's Capacity for International Student Enrolment*—showed that international students comprise 0.7 percent of total K-12 enrolment and 7.5 percent of post-secondary enrolment across Canada.⁶⁶ The capacity study further suggested that Canada's share of international students in post-secondary education is relatively modest compared to competitor countries such as France (12.0 percent), Germany (11.5 percent) and especially Australia (23.2 percent).⁶⁷

Canada has already experienced strong growth rates for international student enrolment over the past several years. Since 2007, the number of international students in Canada has grown by 36 percent to more than 239,000 today. This growth dynamic has accelerated since 2008, with year-over-year growth rates reaching 10.2 percent in 2009 and 11.3 percent in 2010.⁶⁸ These rates demonstrate the level of priority of internationalization of Canada's education field. According to the OECD, Canada's market share of international students was at 5.2 percent in 2009. All things being equal, we project that Canada's market share should remain the same, given that the overall market is also expected to roughly double over this time frame.

2009 domestic and international enrollment in Canada (millions)



Source: Illuminate Consulting Group, *Canada's Capacity for International Student Enrollment*.

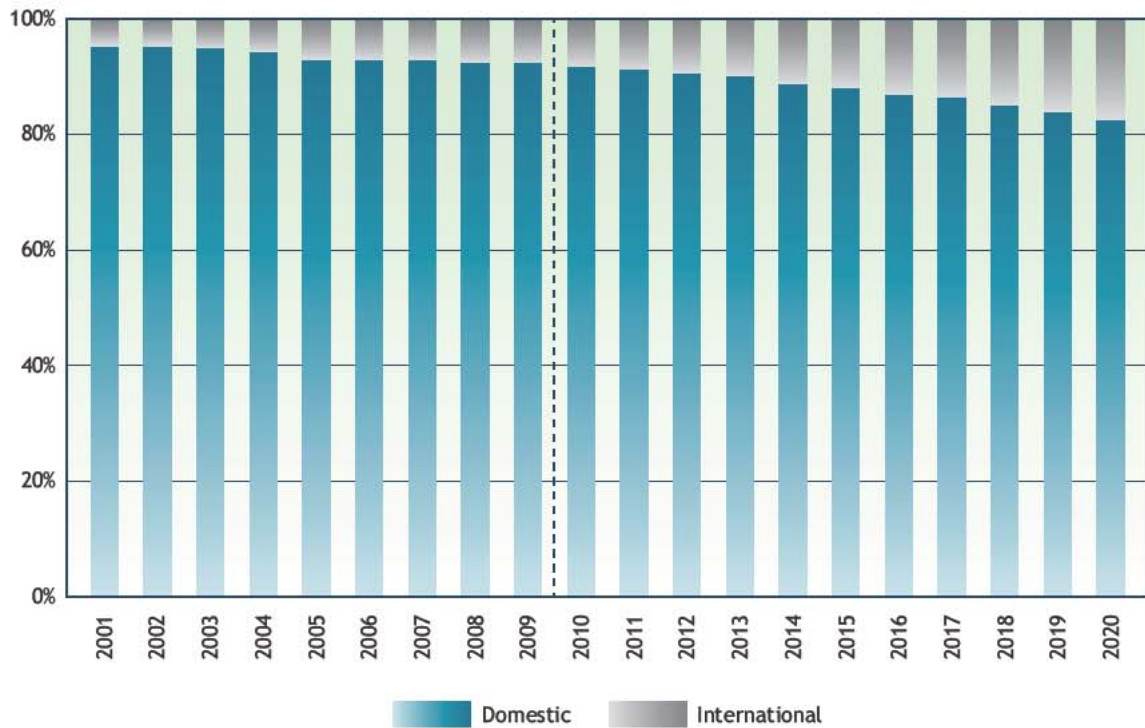
Notes: The left axis measures enrolment in millions. The right axis measures the ratio of international to total enrolment as a percentage. Total K-12 data (Statistics Canada) only includes public schools, while international K-12 data (CIC) includes all schools. Data from: Statistics Canada, Statistics Canada's Postsecondary Student Information System (PSIS), and CIC.

The capacity study projected increases in domestic and international post-secondary enrolment levels in Canada under conditions including a high-growth scenario, wherein international enrolments would grow at a rate of 10.0 percent year over year. The report showed that under this scenario, international students would account for 17.3 percent of total post-secondary enrolment in Canada by 2020.⁶⁹

Overall, the study concluded that Canada currently has no notable capacity issues with respect to enrolling additional international students, and at the national level will not face any capacity issue well into the near future. The study also noted differences in enrolment levels between different provinces/territories and between different education subsectors, suggesting that this allows for sustained growth opportunities in some smaller provinces and at the K-12 level.

In light of these findings and the information we learned from institutions and provinces/territories about their experience of growth in international student enrolments, we sought to identify a target that would allow Canada to be ambitious in its recruitment of international students and researchers while balancing the need to maintain quality and to respect provincial/territorial jurisdiction over education (including seat funding mechanisms and the prerogative to set individual targets or caps for international enrolment).

Domestic and international PSE in Canada high growth scenario



Source: Illuminate Consulting Group, *Canada's Capacity for International Student Enrollment*.

Notes: PSE=Post-secondary enrollment. The dotted line marks the start of projections. The scenario is based on an international enrolment growth rate of 10.0 percent and a domestic enrolment growth rate of 1.0 percent, which is equal to its average over the last five years.

Data from Statistics Canada's PSIS.

Note: "International students" vs. "Foreign students"

When evaluating capacity for international enrolment, it is necessary to note the important distinction between "international students" and "foreign students". As defined by the OECD in *Education at a Glance 2011*:

- Students are classified as "international" if they left their country of origin and moved to another country to study.
- New permanent residents are sometimes classified as "foreign students" as they are not citizens of the country in which they are studying (for example, young people from immigrant families).

Canada's capacity study identifies the combined population of international students and landed immigrant/permanent resident students (i.e. the "foreign student" population) in Canada as an emerging policy issue, considering the potential for issues affecting this broader group of students including academic preparation, language skills and undifferentiated public perceptions regarding the impact of these students on local communities. The study further adds that these issues are particularly salient in major metropolitan areas with large immigrant populations.

Recommendation 1: Double the number of international students choosing Canada by 2022

Canada's International Education Strategy should seek to double the number of full-time international students, from 239,131 in 2011 to more than 450,000 by 2022. We consider this to be a realistic goal given our assessment of the growth trends in international education, and Canada's ability to sustain quality. Canada's education systems have the capacity to absorb new international students without displacing domestic students.

The way forward: We have calculated that this target can be achieved by increasing international student enrolment at a rate of 7 percent year over year. This is an overarching target that encourages provinces/territories and institutions to assess their individual capacities and pursue the opportunities for growth that they are able to support based on their strengths and priorities. Furthermore, we propose that this objective be applied to international student enrolment across the board, not only at the post-secondary education level. There is potential for K-12 and language schools to grow their international student enrolment and provide a strong foundation for pathways through education in Canada. We firmly believe that our target will allow Canada to enrol international students at a sustainable pace that ensures we continue to attract and accept only the highest quality of applicants from around the world.

We are confident that this target for growth will also enable Canada's visa processing systems to capably address increasing volumes of international applications to Canada, thereby safeguarding the quality of our education offerings and the integrity of our visa processes, and ensuring that we continue to be a leading destination for the world's best and brightest students and researchers.

5.2 International mobility for Canadian students

“In the higher education context, internationalization is understood as the process of integrating an international and intercultural dimension to the teaching/learning, research and service functions of a university.”⁷⁰

Internationalization includes several components:

- internationalizing the curriculum (including international views, perspectives or approaches within courses);
- exporting Canadian knowledge services (via partnership agreements, offering joint programs or campuses abroad);
- engaging in international research collaboration;
- recruiting international students to Canadian campuses; and
- encouraging Canadian students to study abroad, carry out an internship abroad or participate in a service learning experience.

Institutions can participate in some or all of these components, depending on their institutional strengths and priorities. Some have a centralized approach or strategy to guide their internationalization efforts while others allow for a bottom-up approach whereby faculty lead the process (or there are a variety of approaches based on the different faculties).⁷¹ The overall goal is to ensure that students have the intercultural and language skills to become leaders in the global knowledge economy—that they become “global citizens”.

Throughout our engagement, we found that most Canadian institutions view internationalization as a top priority. Internationalization of Canadian institutions is supported by faculty exchange programs, which enable Canadian faculty and staff to cultivate best practices from international pedagogies, form relationships with foreign institutions (which can lead to academic and research partnerships) and reflect Canada's quality education offering on the global stage. International experiences for Canadian students enable them to learn from diverse perspectives, immerse themselves in different cultural practices, and learn foreign languages required to conduct business globally.

Université Laval: Preparing students for the global market through international exchange

As part of its vision for internationalizing education and acquiring intercultural skills, student mobility is a component of programs at the Université Laval. To this end, the Profil international program allows students to study abroad for one or two terms, and Stage interculturel et international (SII) offers the possibility of interning in an emerging country. Scholarships for study abroad are available to students who meet certain criteria (language skills, credits earned, GPA).

During the 2010–11 academic year, participants in Profil international and SII received more than \$2.8 million in scholarships. Benefiting from the university's vast network of international agreements (475 partners in 67 countries), 911 Laval students are having the opportunity to gain international experience in all four corners of the world this year.

According to Nicole Lacasse, Vice-Rector, Academic and International Activities: "Our students have to be prepared to evolve in a highly competitive global market. In the global knowledge economy, university graduates should be on the cutting edge of knowledge, but also be capable of working in many languages and in different cultural environments. For the Université Laval, training skilled people today means integrating an international dimension into our programs with possibilities to study or intern abroad."



Université Laval student Jennifer Hamel in Guatemala.
Photo courtesy of the Université Laval.

Canada lags behind competitor countries in international mobility for domestic students. Approximately 3 percent of Canadian university students go abroad as part of study/work programs (compared to 3.5 percent of American students, 5 percent of European students, and 6 percent of Australian students), whereas approximately 1.5 percent of Canadian college students study/work abroad.^x Study/work abroad programs provide opportunities for Canadian students to experience different cultures and societies and become global citizens—and to serve as ambassadors for education in Canada, thus playing an important role in marketing Canada as an education destination. Canadian students with experience abroad will also be in a better position to contribute to Canada's future international trade efforts and prosperity. Canadian students abroad also act as ambassadors for Canada to the world, sharing Canadian values with their peers, and upon their return, they contribute to the development of a more worldly Canadian society.

^x Rough estimates, based on AUCC and ACCC studies.

It is worth noting here that HRSDC's mandate toward labour market and skills development emphasizes a comprehensive approach beyond recruitment, including service exports, two-way flows of students and international institutional partnerships. This approach included the administration of the International Academic Mobility (IAM) Initiative, which provided funding for student mobility and academic co-operation projects between Canadian post-secondary institutions and institutions in foreign partnering countries. In June 2011, HRSDC announced that as a result of a program review, the IAM initiative will no longer be funded by the Government of Canada after March 31, 2015. There have been no new federal funding allocations for undergraduate students for international mobility since the cancellation of the IAM initiative in June 2011.

Recommendation 2: Introduce an International Mobility Program for Canadian Students to serve 50,000 students per year by 2022

In order to fully realize the multi-faceted aspirational goals of internationalization, Canada should consider co-funding, with academic institutions and/or provincial/territorial governments, a major student mobility program to create opportunities for 50,000 Canadian students per year to go abroad for study and cultural exchanges, service learning and other experiential learning activities by 2022. It is anticipated that this investment will be matched by institutions and/or provinces/territories and private donors by a 2:1 ratio. This opportunity would be available across the sector (K-12 through post-secondary institutions).

It is essential that institutions also continue to provide opportunities for faculty exchange and research partnerships with foreign institutions.

Further, we acknowledge that Canadian students are powerful ambassadors who can market opportunities to study in Canada to their fellow students abroad.

CHAPTER 6: Policy Coordination and Ensuring Sustainable Quality



6.1 Internationalization as a priority

We see international education as the most positive aspect of globalization. International education is a key vehicle to engage with other countries and to share our Canadian values worldwide. International education makes an important contribution to Canada's culture, diplomacy and prosperity. Canada can be a model of excellence for the world. Our recommendations aim to capture this opportunity and reinforce Canada as a country of choice to study and conduct world-class research by expanding its mind and market share in international education.

The education field is diverse and covers the gamut from training and skills development to research and innovation. These issues are intimately linked to economic prosperity. Increasingly, the Government of Canada is recognizing a continuum between education, innovation and trade.

We were mindful of existing Government of Canada policies and priorities, such as the Americas Strategy, as well as a new shift in bilateral relationships whereby education is a pillar. For example, the governments of Canada and China recently agreed to make education the fifth pillar of their bilateral relationship, to better acknowledge its growing importance in the relationship, and also set specific targets related to two-way mobility of students. As the mutually reinforcing education, innovation and trade relationship becomes more articulated, we believe international education can play an increasingly pivotal role. As such, and given the transversal nature of education, we advise that it should be included in a comprehensive approach to official Government of Canada policies and plans.

Recommendation 3: Make internationalizing education in Canada a strategic component of the Government of Canada's official policies and plans

The importance of internationalizing education in Canada has to be recognized as a strategic component of the Government of Canada's Economic Action Plan, its international trade and innovation strategies, and its immigration and foreign policies. All partners and stakeholders (relevant government agencies, provinces and territories, and academic institutions) should be strongly encouraged to make internationalization a key priority and to take appropriate, aligned actions.

The panel recommends that education be a key pillar of official missions undertaken by the Government of Canada to priority countries. For example, the Prime Minister during his speech at the 2012 World Economic Forum in Davos, Switzerland, stressed the need to make key investments in science and technology to sustain a modern competitive economy. Given the interconnectedness of the knowledge economy, Canada's International Education Strategy must be a part of the government's agenda to ensure policy alignment with economic, trade and immigration policies. Further, to engage in knowledge diplomacy, the international education strategy needs to be integrated into official missions abroad.

The way forward: The panel sees the Prime Minister as a unifying champion for international education.

6.2 Policy coordination

By calling for an international education strategy, the government was signalling the need to better coordinate all areas of international education.

Therefore, we, the advisory panel, were asked to look at how the strategy might be implemented and by whom, including contributions of partners and stakeholders, based on their mandate and responsibilities. In our recommendations, we have addressed the need for an integrated and coordinated approach to international education at all levels. We specifically analyzed the role and contribution of provincial and territorial governments, particularly in light of the *International Education Marketing Action Plan for Provinces and Territories* as well as contributions of the education associations and Canadian institutions.

During our consultations, we acknowledged that there is an overall consensus among education partners and stakeholders about the challenges of effectively coordinating a strategy with the contributions of many actors, including federal government departments and agencies external to DFAIT (particularly CIC and the granting councils), provincial/territorial governments (who have the constitutional jurisdiction over education), and the many educational associations and institutions that cover diverse subsectors of the education landscape.

One of the coordination issues raised was the lack of a federal government body with responsibility for education issues. This makes it challenging for the international education strategy to achieve a whole-of-Canada approach and a consistent education brand in terms of international activities. It was also noted that some provincial/territorial governments do not have an international education strategy, but those that do have indicated a willingness to work with the federal government in an integrated fashion.

6.2.1 Coordination of the international education strategy

There was overall appreciation of the work done by Edu-Canada, which was generally considered as an important contribution to building a pan-Canadian strategic approach to international education. It was frequently noted that the coordination of the international education strategy should stay with DFAIT and its network of embassies and offices abroad, working closely with education associations including the CCIEM. There are several factors that provide context for this recommendation.

In 2006, Canada was the only major receiving country that did not have a government-supported agency or body devoted to promoting international education. Despite annual investment by Australia, New Zealand and the United States, all totalling more than \$10 million each in marketing initiatives, Canada's modest \$1.0 million allocated each year from 2006 to 2012 was effectively managed to achieve stated goals. It now provides a foundation to increase the overall flow of top-quality students to Canada.

From 2007 to 2011, Edu-Canada exceeded its goals with an increase of international students by 36 percent, an increase in Canadian curricula abroad of 41 percent, and a visibly enhanced profile at bilateral round tables and signature events that brought together the entire education sector in Canada. The next evolution for the international education strategy must be to elevate Canada's position to ensure we achieve growth in market share. We should not simply attract greater numbers of students and partnerships. The investment is to ensure Canada attracts students of the best calibre and supports partnerships that contribute to Canada's competitive knowledge advantage.

In making final recommendations, we weighed all of the contributions of the engagement process, the jurisdictions that legislate education in Canada and the priorities raised by advocacy from the education sector. We have analyzed best options and various models for the delivery of a pan-Canadian international education strategy to ensure there is continued coordination in delivering a high-quality, sustainable strategy.

Delivery models reviewed included an external agency, an external consortium led by the education industry and variations of a federal-provincial/territorial-industry partnership. It was concluded that the federal government should remain the coordinating body. This reflects the confidence and authority the Government of Canada imparts in markets abroad, and its interaction among other government departments. There is uncertainty related to an external body that is not accountable to the Canadian public and the high costs to create a new infrastructure in Canada (as well as offices abroad) with education staff. Resources at Government of Canada embassies and offices abroad provide a cost-effective and informative source to deliver in-country strategies, enabling a shift from funding more bricks and mortar to implementation of a digital strategy. A digital strategy capitalizes on modern technology—the tools most used and readily accessed by our audience—and it offers a platform that will best serve the entire education sector in Canada for its promotion across all global markets.

Furthermore, we realize that this is not the first foray in supporting international promotion of education. The Canadian Education Centre Network (CECN) was established in 1994 with joint funding by DFAIT and CIDA with the goal of self-sufficiency by 2005. With a total of some \$26 million in federal support, the CECN had a certain impact in raising Canada's profile but was faulty in its management and heavy infrastructure resources and subsequently discontinued operation. It left a significant gap in services to promote education in key markets. The Edu-Canada initiative stepped in to implement a mitigation strategy through brand coordination and the Trade Commissioner Service.

6.2.2 Coordination mechanisms

To ensure effective positioning of Canada on the international stage, our conclusion is that an ongoing senior coordination body is required. We suggest the creation of an entity that will provide a formal coordination structure: the Council on International Education and Research (CIER). This council will provide high-level policy and planning for the international education strategy. The CIER would meet on a semi-annual basis, would be chaired by DFAIT (at the deputy minister level) and must include provincial/territorial governments (also at the deputy minister level, via CMEC). There would also be a role for experts or sector associations to discuss progress on the implementation of the international education strategy. This council would ensure each representative provides expertise and networks to support the overall success of the strategy.

This structure is inclusive and would leverage the respective strengths of the federal government, the provincial/territorial partners and stakeholders. It will build on existing assets but will require clear roles and responsibilities for each member.

Existing DFAIT resources and the established federal-provincial/territorial partnership allow for immediate and effective implementation. Existing collaboration with the education industry can be further enhanced to leverage strengths and maintain coherent and cohesive momentum. Mechanisms are already in place to coordinate the delivery of the strategy and ensure that all partners and sectors are engaged, including:

- Federal-Provincial Consultative Committee on Education-Related International Activities (FPCCERIA): Co-chaired by DFAIT and CMEC for federal-provincial/territorial interests in international education, including brand co-management.
- Council of Ministers of Education, Canada: CMEC is an intergovernmental body for policy, collaboration, collective representation and federal co-operation.
- Canadian Information Centre for International Credentials (CICIC): The CICIC is CMEC's source for foreign credential assessment and quality assurance concerning Canada's education systems.
- National Education Marketing Roundtable (NEMR): Chaired by DFAIT to facilitate consultation between governments, partners and stakeholders in the education community.
- Advisory Committee on International Students and Immigration (ACISI): CIC's consultative forum to engage stakeholders, partners and other government departments in immigration matters related to international education.

Each of the education subsectors has a professional association with responsibility in meeting members' interests as they relate to quality assurance, internationalization initiatives and core interests regarding delivery of education.

Contributing key advocacy throughout the engagement process, the Canadian Consortium on International Education Marketing has established a strong alignment of subsectors (language, secondary and post-secondary education) in a coordinated approach to international education promotion. Any of the CCIEM members or other Canadian education associations may be a strong candidate for a competitive, contractual arrangement that would offer a nimble approach to deliver components of the strategy.

The provinces/territories have clearly signalled their interest in working with federal partners through the International Education Marketing Action Plan for Provinces and Territories. Ministers responsible for education and provincial and territorial ministers of immigration recommend that they "pursue discussion with federal ministers of international trade and immigration with a view of aligning federal initiatives relating to international students

with the priorities outlined in this action plan”. In Canada, Section 93 of the *Constitution Act 1867* states that “in and of each Province, the Legislature may exclusively make Laws in relation to Education.” Provincial/territorial jurisdiction includes the design, planning and delivery of their post-secondary education and skills training systems as outlined by the Council of the Federation. The provision of educational services is overseen by way of departments or ministries of education headed by an elected official, the Minister of Education. These departments/ministries are responsible for services to assure quality education for their population, such as through setting policy measures, providing adequate financial resources, determining the core curriculum content, and having personnel available to deliver services.

Federal authority for promoting Canadian post-secondary education abroad is specific to legislation related to international trade within the [Department of Foreign Affairs and International Trade Act](#). The FPCERIA has effectively coordinated activities between jurisdictions. Thus, with an established alignment at all levels of government, the way forward will ensure a stable and sustainable delivery of Canada’s International Education Strategy.

Ongoing implementation should be measured and evaluated to inform future decisions, to set competitive benchmarks and to ensure that the overall quality of the education experience and immigration policy is not compromised. Coordinated research regarding capacity, economic impact, labour market needs and quality assurance across all sectors can be coordinated by DFAIT on behalf of the CIER, through federal or provincial/territorial initiatives released to provide advice to the CIER.

Recommendation 4: Create a Council on International Education and Research (CIER) to provide policy advice to the Ministers of International Trade, Finance, Citizenship and Immigration, and Industry

To ensure effective positioning of Canada in international markets, a high-level, formal coordination structure is required. The panel recommends the formation of a Council on International Education and Research. We recommend that the council should be representative of all the sectors of education and regions of Canada and be composed of the three deputy ministers (international trade, citizenship and immigration, and industry), the chair and two other deputy ministers of the Advisory Committee of Deputy Ministers of Education, and other stakeholders appointed by the Government of Canada. It will provide policy advice to the ministers of International Trade, Finance, Citizenship and Immigration and Industry monitor progress on implementation of the strategy and will remain accountable to the Canadian public via annual reports.

The way forward: Overall responsibility for operational management of Canada’s International Education Strategy should rest with DFAIT. The department will work in close collaboration with CIC (a major partner in this initiative) and stakeholders. The work of the council should be supported by a secretariat within the appropriate branch of DFAIT. We also recommend that, as required, small joint working groups with appropriate representation be convened under the auspices of the CIER on issues related to marketing, scholarship coordination, immigration and visa processing issues.

We see a need to work closely with CMEC and the provinces/territories to fully embed education, innovation and trade into Canada’s ongoing policy development.

6.3 Ensuring sustainable quality

On several occasions, we heard from partners and stakeholders that growth in the number of international students coming to Canada should not occur to the detriment of quality. Each and every international student should have a quality experience at a quality education institution. Consequently, quality assurance became a salient issue for consideration, as did the safeguarding of the integrity of Canada's visa process.

Quality-assurance policy framework

Given that education is a provincial/territorial jurisdiction, each province/territory has developed its own approach to credit recognition, credit transfer and quality assurance.

The panel recognizes a need for more training opportunities for institutions related to good quality-assurance practices. Chapter 9 will look more specifically at our training recommendations.

Further, within each provincial/territorial context, institutions and professional bodies also have their own approaches and policies. Being mindful of the provincial/territorial jurisdiction over quality assurance, a clear and consistent presentation of the various approaches is needed to compete with countries that have a centralized approach to education (and by extension, a centralized approach to quality assurance).

The panel took note of CMEC's Bringing Education in Canada to the World, Bringing the World to Canada: An International Education Marketing Action Plan for Provinces and Territories. The action plan makes specific statements related to quality assurance, including calling to:

Protect and enhance Canada's reputation as a provider of high-quality educational opportunities

Actions:

- *Develop a periodic survey of international students in Canada to provide information about their satisfaction with their studies, financial situation, perception of their security and quality of life in Canada, and plans after graduation.*
- *Create communications materials that are accessible to an international audience and that convey the nature of the Canadian regimes of quality assurance in all education sectors.*
- *Share information about leading Canadian and international practices to support international students.*
- *Work with CIC to balance the need to prevent fraudulent entry into Canada with the need to remove obstacles to the entry of legitimate international students.*

Quality control is crucial to preserve Canada's reputation in terms of credibility and national branding. For the time being, at the international level, the *Imagine Education au/in Canada* brand eligibility and the visa approval constitute the only "filters" in terms of integrity and quality control of our systems.

In the current global context, quality assurance is an important counterpoint to institutional rankings. In the case of Canadian universities, where there is no accreditation system, it is particularly important to clearly communicate the various approaches to quality assurance.^{xi} The combination of approaches to quality assurance is quite robust, though our approaches need to be communicated in a clear way to prospective international students and to key influencers (e.g. agents, parents).

A quality experience for international students

The panel became aware via certain submissions and round table participant interventions that the quality of the experience of international students varies across Canadian provinces/territories and institutions. For example, students in some provinces/territories are covered by health insurance, while other provinces/territories do not provide health benefits. The scope and nature of the support services provided to international students also varies across campuses. The panel places an intrinsic value on ensuring each and every international student has a quality educational experience.

Recommendation 5: Maintain and enhance the quality of the education system and ensure its sustainability

Across-the-sector quality is the core of Canada's brand. We recommend that adequate mechanisms be put in place to ensure that this quality is maintained and enhanced. Such mechanisms should be a core part of Canada's International Education Strategy.

The way forward: Given provincial/territorial jurisdiction over education, we recommend that the Council on International Education and Research work closely with CMEC to establish clear guidelines on quality assurance and a quality assurance framework that will ensure that Canada's reputation for quality education and support of international students is maintained.

We see a need to work closely with CMEC and the provinces/territories to fully embed education, innovation and trade into Canada's ongoing policy development.

^{xi} According to the AUCC website: "Canada has no formal system of university accreditation. Membership in AUCC held in conjunction with an appropriate provincial legislation or charter may be accepted in lieu of institutional accreditation."

CHAPTER 7: Promotion of “Education in Canada”

7.1 Priority markets

During our deliberations, we recognized that most Canadian education institutions prefer to have a diversity of international students, although they realize there may be efficiencies in recruiting in a select number of priority markets. They also see the importance of moving beyond the more established markets.

Individual education institutions across the various education sectors are targeting a wide range of countries for their recruitment efforts, using different types of criteria in their decisions, such as institutional partnerships, countries/regions that match their program and/or research specialities, and existing contacts, networks, alumni and relationships with education agents.

To support education institutions in Canada with their marketing endeavours, the Government of Canada had also identified a list of priority markets and regions in which it would focus its efforts. In 2007, DFAIT’s consultation with institutions, provinces/territories as well as stakeholders resulted in identifying nine priority markets and four regions, ensuring alignment and diversity in international education promotion efforts.

Through our engagement process, we invited partners and stakeholders to identify priority markets in which the Government of Canada should focus its efforts. One of the main criteria for our evaluation was to look for the markets that offered the greatest growth potential for post-secondary education for Canada, based on market reports shared by DFAIT. Suggestions were shared through the online consultation, the cross-Canada round tables, a collaborative event, and a benchmarking visit to Asia. Provinces/territories were also consulted separately through DFAIT to ensure alignment in efforts. As well, CIC was consulted to ensure that the visa offices in the identified countries would have the capacity to accommodate an increase in study permit applications.

To complete our list of recommended priority markets, we looked at priorities identified by the provinces/territories for education marketing efforts, reviewed the findings of our consultation process, and evaluated trends in international student numbers from key markets. Our findings were also compared with existing Government of Canada policies and priorities to ensure alignment.

To this end, DFAIT consulted with all ten provinces, given their high level of engagement in international education, to identify their priority markets.

Priority countries and regions for the provinces were:

Top overall countries (number of mentions)	Top regions (number of mentions)
1. China (9)	1. Southeast Asia (6)
2. India (9)	2. Caribbean (5)
3. U.S.A. (9)	3. Middle East (4)
4. Brazil (9)	4. Africa (4)
5. Mexico (8)	
6. South Korea (8)	
7. Vietnam (7)	
8. U.K. (7)	
9. Turkey (4)	
10. Japan (4)	
11. France (4)	

Subsequently, during our online consultation process, we asked stakeholders about key markets of interest in their internationalization efforts. In the submissions we received, there was a total of 994 mentions of individual countries or regions of the world as either established, emerging or markets of future potential interest (78 individual countries, many of which were only referenced once or twice, and 18 regions or sub-regions). Based on this list, we saw that although priorities may vary across education subsectors, overall there were several countries and regions that appeared often as markets presenting great opportunities or potential. The most frequently mentioned countries and regions are as follows:

Top overall countries (% of all mentions)	Top overall regional (or sub-regional) clusters (% of all mentions)
1. China/Hong Kong (11%)	1. Europe (8.4%)
2. India (8.9%)	2. Asia (8.1%)
3. Brazil (6.7%)	3. Middle East (6.3%)
4. Vietnam (4.6%)	4. Africa (5.1%)
5. U.S.A. (3.9%)	5. Francophone Africa (3.6%)
6. Korea (3.5%)	6. Maghreb region (3.3%)
7. Mexico (2.7%)	
8. Turkey (2.4%)	

These two separate consultation processes pointed us to a list of potential markets for the IES. To further refine our selection and identify where the best prospects for growth were, we assessed data from CIC on the number of new international student entries from Canada's top 25 source countries between 2001 and 2010.

Total entries of international students from Canada's top 25 source countries, 2001–2010

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
People's Republic of China	11,446	11,811	10,140	7,458	7,432	8,988	10,037	13,685	16,401	17,934
India	1,288	2,138	2,492	1,824	2,258	2,750	2,697	3,250	5,726	11,543
Republic of Korea	14,052	14,842	13,969	13,456	13,822	15,597	15,170	13,940	11,061	10,527
Saudi Arabia	296	351	565	643	836	822	1,428	3,524	5,289	6,941
France	4,617	4,068	3,951	4,238	4,410	5,123	4,815	4,676	5,327	5,656
United States of America	6,543	5,785	5,618	5,664	5,611	5,376	5,288	4,696	4,663	4,584
Japan	7,278	6,759	6,022	5,711	5,516	4,817	4,310	3,632	3,319	3,253
Mexico	5,077	3,908	2,384	2,388	2,617	2,718	2,642	2,589	2,760	2,933
Federal Republic of Germany	2,087	1,964	1,766	1,903	2,036	2,098	2,344	2,513	2,331	2,451
Brazil	1,864	1,360	687	835	975	1,202	1,427	1,745	1,739	1,807
Unknown	367	291	350	319	276	393	438	488	668	1,527
Taiwan	2,378	2,439	1,860	2,127	2,135	2,052	1,870	1,596	1,364	1,282
United Kingdom and Colonies	1,599	1,260	1,217	1,392	1,448	1,521	1,697	1,607	1,400	1,224
Iran	327	453	625	822	859	532	640	769	1,109	1,187
Nigeria	171	175	424	405	445	334	492	536	810	1,120
Hong Kong	1,918	1,873	1,650	1,657	1,432	1,224	1,146	1,121	1,007	1,058
Socialist Republic of Vietnam	424	524	813	391	346	242	252	593	663	1,048
Colombia	764	596	368	273	346	466	453	466	535	934
Turkey	513	527	479	560	662	685	697	720	927	868
Russia	369	323	295	347	411	448	545	706	780	816
Pakistan	438	307	335	342	356	444	397	504	627	787
Morocco	629	556	572	562	652	738	847	939	881	751
Venezuela	911	636	249	246	336	429	484	470	429	649
United Arab Emirates	443	476	498	546	565	470	555	678	619	633
Tunisia	688	593	519	499	497	503	522	625	656	604
Malaysia	331	320	361	287	347	324	339	488	516	537
Thailand	497	582	554	590	547	528	476	482	512	533
Bangladesh	419	479	427	362	345	328	285	460	430	518
Australia	977	783	627	561	590	560	568	491	462	465
Switzerland	619	511	372	396	413	430	400	412	412	406
Republic of Indonesia	444	508	544	471	418	375	330	333	299	316
Singapore	320	236	322	379	298	273	296	275	250	273
Sweden	421	297	240	204	223	219	252	208	197	199
Top 25 Countries	67,915	65,431	58,775	55,478	56,943	60,521	61,588	66,111	71,178	82,117
Other Countries	12,987	11,502	10,930	10,638	10,935	11,268	12,443	13,418	14,000	14,040
Total	80,902	76,933	69,705	66,116	67,878	71,789	74,031	79,529	85,178	96,157

Source: Citizenship and Immigration Canada, 2010 Facts and Figures.

We recognized that in the current fiscal environment, resources are limited. In order to deliver an effective strategy, the Government of Canada should focus its efforts in a limited number of markets where significant progress can be made to brand Canada as a country worthy of attracting top talent. Targeted resource allocations can be more efficiently implemented, monitored and evaluated. Focussing our efforts on a few key markets will ensure the best return on investment. In the words of Michael E. Porter, Professor at Harvard Business School and a leading authority on competitive strategy, “The essence of strategy is choosing what not to do.”

Both emerging and mature markets were considered in this process. Notwithstanding the greater emphasis on specific priority markets, it is important to recognize that with an increased investment in international education marketing, the Government of Canada will now be able to allocate a greater amount of resources to all other markets than is the case today.

Recommendation 6: Focus Canada’s promotional efforts on a limited number of priority markets for targeted resource allocation

We recommend that resources for promotion activities should be focused on the markets assessed to have the greatest growth potential for Canada: China, India, Brazil, the Middle East and North Africa (MENA) region including Turkey, Vietnam and Mexico. These markets should receive priority resource allocation. Mature markets, such as South Korea, the United States, France and the United Kingdom, should receive substantial resources to maintain their activities at a level at least equivalent to current funding.

The way forward: A re-evaluation of priority markets should be carried out every three years (under the purview of the CIER with appropriate consultation with provinces/territories and CIC). As one size does not fit all, the panel recommends the development of country-specific strategies and an enhanced role for Canadian embassies and offices abroad. The activities will draw heavily on a strengthened, innovative and renewed e-platform.

We also recommend that in order to complement the expertise of the Trade Commissioner Service, experts from the academic institutions or associations should be seconded to DFAIT. Canadian offices abroad in the key markets should form education teams composed of trade commissioners and visa officers. These education teams should be accountable to the head of mission for the promotion and facilitation of the international student recruitment process.

7.2 Marketing Canada’s brand

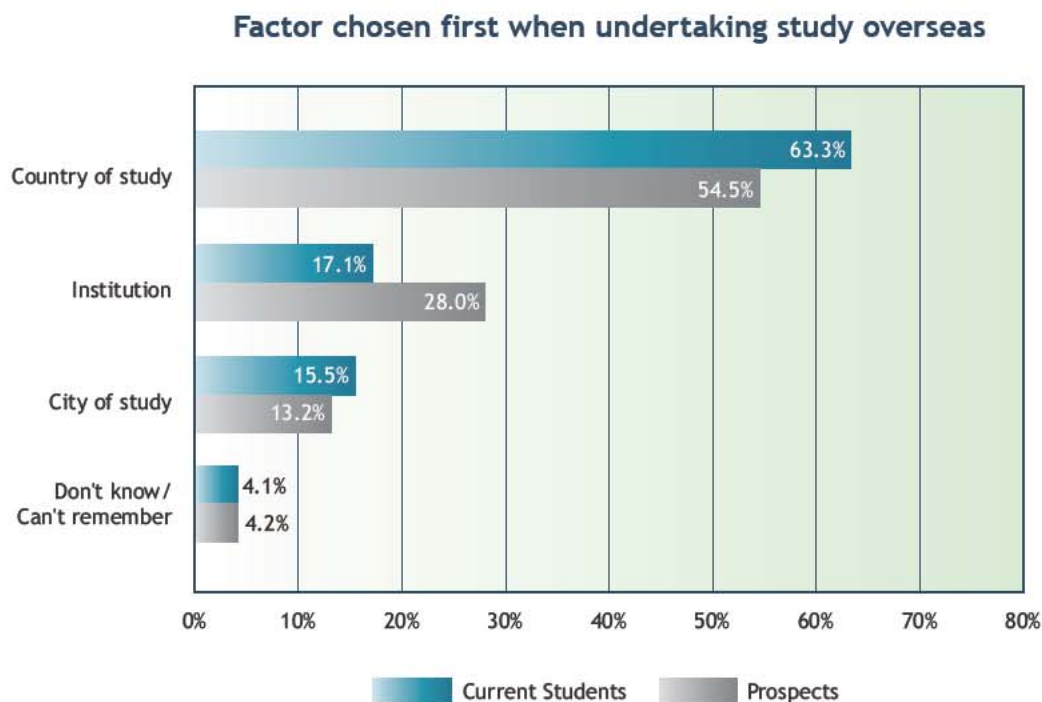
The overarching goal of an international education strategy is to brand Canada internationally as a choice destination for talented people from around the world for studying, conducting research and potentially immigrating. Canada has a unique opportunity to take advantage of its natural strengths (strong economic foundation, safe environment, an ever-growing multicultural population with ties to the world and recent changes to our immigration policy under the Canadian Experience Class). Canada is thus well positioned to gain greater market share while continuing to raise its international profile.

The deliberations of the panel have led to the conclusion that Canada can double the number of international students in 10 years while maintaining high-quality standards (to maintain brand integrity). The brand, corresponding to a pan-Canadian approach, is the central piece of all marketing initiatives. Edu-Canada’s significant accomplishment

was the successful negotiations with the provinces/territories to create the *Imagine Education au/in Canada* brand.^{xii} It must be recognized that the education brand for Canada is larger than either the brand name or logo. It is a reflection of the quality, diversity and opportunity of Canada's education offerings.

We know that students choose a destination country in the first step of their selection process and that a coordinated approach will best serve all education sectors by leveraging Canada's existing country brand, which is already very positive. Simon Anholt, creator of the Nation Brands Index, agrees that Canada is globally admired but suggests there is not a clear country brand that can be articulated. Canada is well liked, but people are not quite sure why.

In 2007, research was presented for Canada to learn more about international student decision making. JWT Education completed public opinion research with 371 international students currently studying in Canada and 190 international students studying outside of Canada. Respondents represented a total of 80 nationalities.



Source: JWT Education, Quantitative Survey Among International Students, *Factors that Influence Students' Considerations for Overseas Study*. Presentation to the National Education Marketing Roundtable, Foreign Affairs and International Trade Canada. 2007.

Clearly, a coordinated approach where Canada can speak with one voice will best serve all provinces/territories and education sectors across Canada. If Canada is to be successful in gaining greater market share against competitors, this is the time to launch a more sophisticated strategy because the foundation exists through the collaborative federal-provincial/territorial brand arrangement.

xii In 2008, deputy ministers of education of all 10 provinces, working closely with DFAIT, approved by consensus the proposed pan-Canadian education brand called *Imagine Education au/in Canada*, with the understanding that it would be jointly managed by DFAIT and CMEC, on behalf of the provinces/territories. In June 2008, Edu-Canada started to develop promotional material and communications tools using the brand.

The groundwork has already been done. Canada can present a unified, attractive message that represents the excellence of our learning institutions and the promise of an unequalled education experience for international students. The delivery of this brand message will evolve to gain global recognition and reflect the tangible benefits of specific education subsectors in Canada. Successful branding initiatives must be responsive to the brand user in Canada and reaction by the primary audience: international students.

Currently, the brand logo is trademarked in 90 countries. The panel reviewed the branding process to learn more about the composition of the brand logo and how it came to fruition. This logo is the protected visual identity of the brand and comprises a maple leaf (the most recognizable symbol for Canada), the signature, *Education au/in Canada* (which suggests bilingualism as well as language used by competitors who most often use their country name associated with “Education in”) and a slogan, *Imagine* (which is a personal proposition inviting students to interpret what they will read and see).



Opinions varied on the effectiveness of the *Imagine Education au/in Canada* name. For example, several discussions raised concerns about the user “unfriendliness” of “au/in” (which was a compromise reached to reflect Canada’s bilingualism). While there may be a strong reticence on the part of federal/provincial/territorial governments to re-engage in the extensive consultative process needed to re-evaluate or revisit the brand name, there is strong interest to develop a novel campaign to support niche sectors, building upon success to date.

“The members of the Association des universités de la francophonie canadienne (AUFC [association of francophone Canadian universities]) collectively play a valuable role in the enhancement of Canada’s brand and the Canadian identity. Through their promotion of the Canadian francophone and linguistic duality, they increase the attractiveness of Canada as a destination to study and as a research partner.”

Marc Arnal
President, Association des universités de la francophonie canadienne
Dean, Campus Saint-Jean at the University of Alberta

Results of public opinion research will best inform the future direction for branding initiatives. Consensus would indicate that building on the current basis would be the best use of resources. However, it is imperative that the brand evolve, especially to respond to subsector–brand differentiation. Overall, a greater effort for the brand to be recognized should be a central priority.^{xiii} Through the consultation process, it was recommended that DFAIT and CMEC continue their existing collaboration on the management of the brand, noting that they must evaluate and build on the existing products. An immediate action would be to engage with education stakeholders to identify ways for different sectors to differentiate brand tools to best reflect their offerings while maintaining consistent imaging and messaging.

xiii Branded bilingual (and multilingual) materials developed include promotional brochures, sectoral brochures, map of post-secondary institutions, video, graphic details, pavilions and additional promotional paraphernalia as required for a specific audience/function.

A foundational understanding of primary, secondary and tertiary audiences is fundamental in launching and evolving a brand strategy. As the education brand evolves to meet the niche sectors in education, it can also evolve to meet the broader needs of our entire audience. This includes specific needs that should be addressed accordingly. A brief profile of the international audience for education promotion may be summarized in key groups:

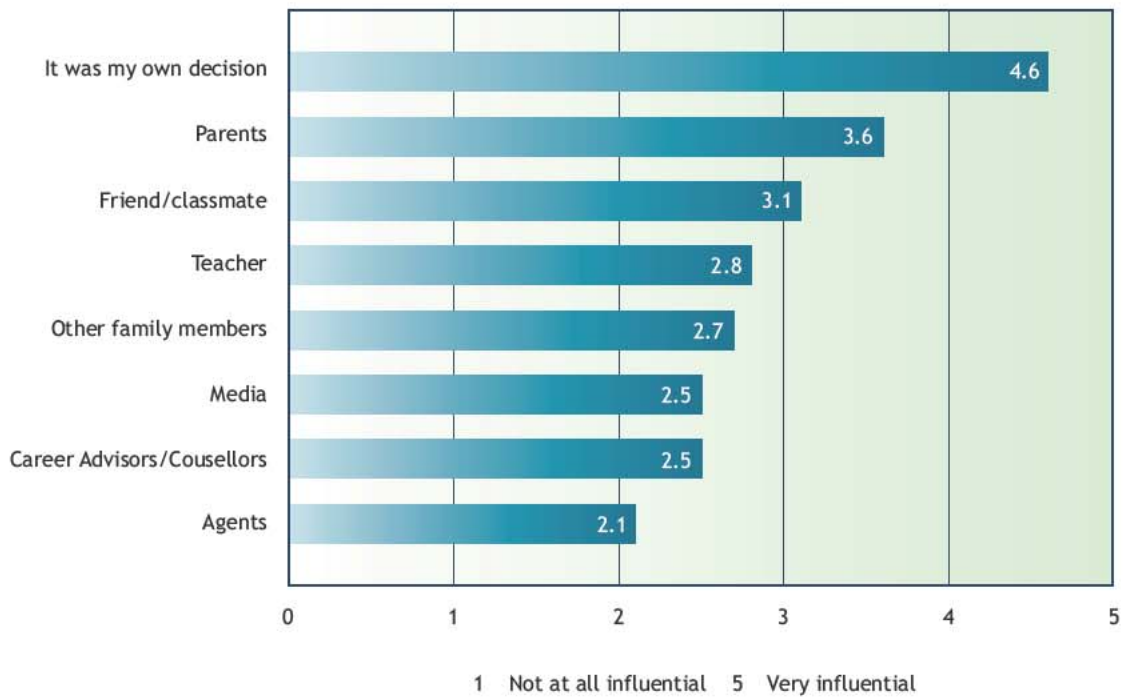
- The primary target market is international students and researchers residing outside of Canada who have an interest in study abroad at all levels of education. Branding communications must use the technological tools that scholars need to search for country information, programs, reputation, scholarships, fees, lifestyle, careers, events and advice. With current social media networks, our audiences also want to be able to share their findings.

Potential partners for international agreements and collaborations are also a primary audience. This group of professional educators seeks high-calibre reciprocal agreements and needs a coordinated presence to identify opportunities and facilitate the signing of agreements.

- The secondary target market includes a broader audience: parents, who have significant influence over decisions and referrals. They seek content in their primary language, referrals, familiarity, rankings and quality assurance. They want to know that a credential is recognized.
- Agents are key influencers in many markets but are usually on contract with institutions. These education consultants require training for ongoing quality assurance. While the Government of Canada does not monitor agents for compliance, best practices should be established by institutions via their contractual agreements to foster a culture of excellence in representing information on Canada.
- School counsellors and teachers seek tools for advising students, preparing them for careers and providing tips for transition to a new country. Canadian teachers are an asset and can be a specific referral network, if properly recognized and included in a branding campaign.
- Media is an extremely valuable outlet given the rising interest in international education. Journalists require quick access (preferably online) to authoritative information with a toolkit including messages, facts, storyboards, video, photos for placement and interview opportunities, when appropriate.
- The tertiary audience is a valuable referral network that offers a direct relationship with education in Canada and includes alumni, current and exchange students and scholarship recipients. This target market requires a specific communications strategy, as international students and parents rely on personal contacts and referrals to make decisions about where to study. Often, members of this audience return to their home country and bring with them a unique and ongoing relationship with Canada.
- Finally, of critical importance is our internal audience. The Canadian public and the education sector in Canada must hear an articulated and tangible rationale regarding the value of international education as it relates to their own interests. It is important to identify how Canadian students, educators, associations, businesses and communities can participate in international education opportunities for their own benefit, to ensure an inviting and sustainable strategy exists for Canadians as well as for international students and researchers.

In developing a comprehensive communications strategy, the most effective channels to deliver Canada's education brand message will be further realised. This can be done through many of the existing activities (promotion events, in-person advising, earned and paid media, Web and social media networks) as well as through innovative channels that will continue to emerge as the "new best thing." Experts in the field of education and, in particular, those with an in-country lens will best inform delivery channels and opportunities for specific niche markets. There is great potential to coordinate initiatives with provinces/territories as well as with stakeholders and individual institutions.

Factors that influence students' considerations for overseas study



Source: JWT Education, Quantitative Survey Among International Students, *Factors that Influence Students' Considerations for Overseas Study*. Presentation to the National Education Marketing Roundtable, Foreign Affairs and International Trade Canada. 2007.

Recommendation 7: Increase marketing of Canada's brand

Research shows that international students first choose the country in which they wish to study and subsequently, the institution. A stronger presence of the Canada brand abroad at key international events, where stakeholders and institutions are united under one banner, will strengthen Canada's recognition and international students' exposure to the possibility of studying and conducting research in Canada.

The way forward: Develop a comprehensive communications strategy that will see the profile of the Imagine Education au/in Canada brand reflected in all areas of marketing, media relations, event promotion and digital communications to ensure the coordinated messages of the brand proposition and representation of education opportunities in Canada are delivered with even greater impact, and develop comprehensive strategies for priority countries. Organizing participation at key international education trade fairs, branded promotion activities and continued Canada trade fairs are all part of this initiative. Tailored activities should be undertaken for specific subsectors to ensure the niche needs of each sector are met and that brand-eligible education providers in Canada come to fully endorse and apply the brand in their own marketing activities.

7.3 Digital strategy

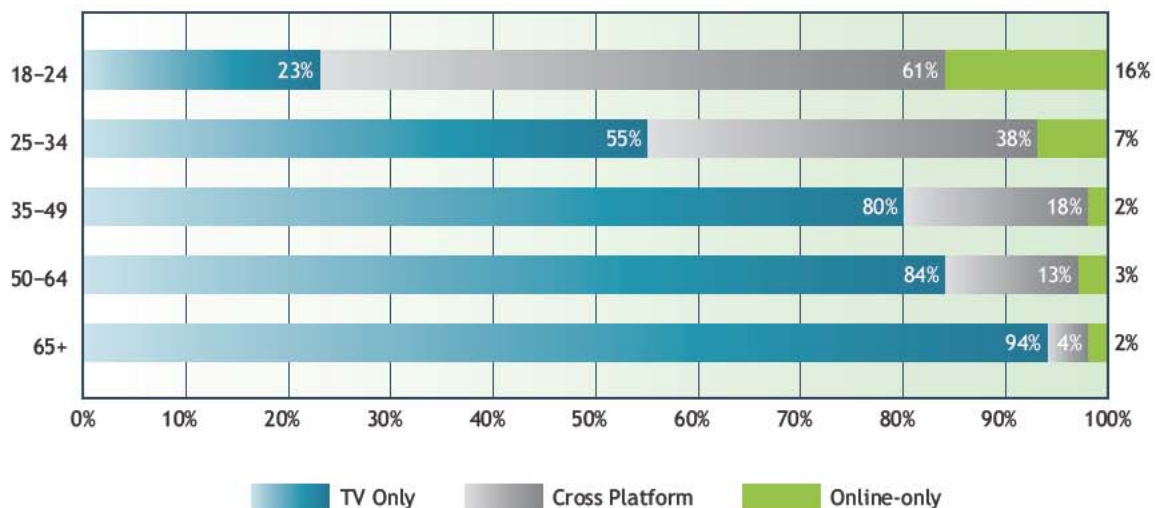
During our consultation and particularly at the collaboratory, consensus was reached that an “enhanced, comprehensive marketing approach” was a top priority for the strategy. Given an international youth audience and a new era in marketing communications, the digital platform should become the most prominent tool for delivering a strategy that will have worldwide reach in building a brand relationship. This would involve using current marketing tools and an inclusive communications strategy throughout the international student cycle to attract a prospective student, engage an applicant, share the experience of a registered student and finally, to promote the success of international graduates in Canada and abroad. Furthermore, broadening the current student audience will enable a more comprehensive strategy to include all appropriate influencers who are involved in international education. This may include partner institutions, foreign governments, parents, agents, alumni, current student peer networks and media.

In building a digital strategy, it is recommended that all initiatives be coordinated (if not delivered centrally) to ensure that the overarching marketing plan connects all activities—education events, promotion campaigns and e-communications—with an articulated outcome that can be measured. The full spectrum of activities should be coordinated under the same umbrella to support the recognition of Canada’s brand.

Why is the Internet so important?

Recent research shows that the Internet, and increasingly social media, is an assumed component to any international marketing strategy. Internet strategies can be managed, targeted, personalized and measured for performance. The reach of a digital strategy can be far greater than any other traditional media. The Television Bureau of Canada reports that 77 percent of users between the ages of 18 and 24 consume media online or cross-platform, rather than on television alone.

Media consumption in Canada, 2011 by age distribution

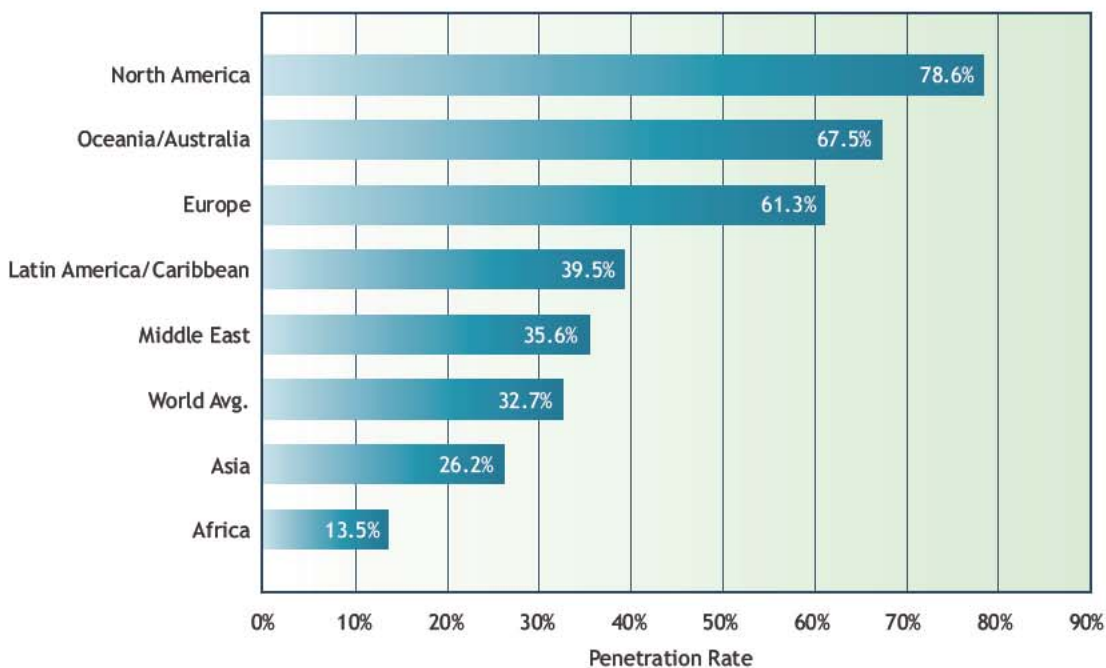


Source: Television Bureau of Canada.

It is also important to consider the international context for world Internet usage, Internet penetration in key regions and use of social media networks in key countries. There are now 2.27 billion Internet users globally. That figure represents 32.7 percent of the global population, and suggests an increasing focus on social media engagement. While access is not equal in all parts of the world, mobile technology and social media tools are enabling greater access, quickly revolutionizing communications strategies.

There are significant opportunities to develop unique tools that will differentiate Canada as we seek to attract top talent through education. Initial investments in the international education promotion website (originally dubbed Live, Learn and Succeed), launched by DFAIT in the 1990s, created an innovative tool with applications for users to search for programs, to identify tuition costs and to personalize visa requirements through an interconnected database pulling program and tuition content from existing government databases at HRSDC and CIC.

World internet penetration rates by geographic regions, 2011



Source: Internet World Stats, www.internetworldstats.com/stats.htm. Penetration rates are based on a world population of 6,930,055,154 and 2,267,233,742 estimated internet users on December 31, 2011. Copyright© 2012, Miniwatts Marketing Group

Competitor innovation and technology advancements have now introduced additional initiatives for mobile users, social networks, “smart” question and answer software and personalized client profiles. It is time for greater investment to ensure Canada remains competitive in attracting scholars and linking education and research opportunities to labour market needs and immigration incentives. With this in mind, a strong website is recommended in support of social media to ensure there is an “authoritative source” behind social networks. Possible components of the website could include:

- Tools to search for programs, career links, scholarships and visa processing
- Applications (tools) to generate action from using the site (e.g. apply to study in Canada, share media stories, agent advising, peer sharing, travel planning)
- General description of institutions
- Comprehensive information on scholarships and bursaries
- Visa and immigration details
- Frequently Asked Questions (FAQs)
- Interactive maps
- Video testimonials
- Coordination with tourism or labour market opportunities
- Toolkit to prepare students for their transition to Canada
- Multilingual content to support parents
- Google search
- Rankings
- Online service for peer-to-peer mentorship
- Promotional application for mobile devices

It was also raised that the application process ought to be easy for students to navigate, from searching to registration. An external application centre (i.e. a one-stop shop) for international applicants to use was raised as a tool to ensure the process is user-friendly. This could be complemented by an online mentoring centre. Tools exist for online interaction and can fairly easily be implemented with appropriate human and financial set-up resources. Ongoing maintenance is less resource intensive once the primary questions and answers are compiled in a database. The application system may be more complex, given existing application centres that primarily focus on Canadian students in key provinces and the independent application systems in place for each institution to attract and manage relationships with their own international applicants.

Further modeling of the potential for a digital strategy is included in Annex D.

Recommendation 8: Develop a sophisticated and comprehensive e-communication system that will serve as a national portal for international students interested in education in Canada

To effectively share information with potential international students, it is critical to have a sophisticated website that is well populated with easy-to-navigate resource material on education options in Canada. This website could have comprehensive information on institutions, with links to each institution's website; a comprehensive list of potential programs of study; advantages of studying in Canada; and video testimonials from international students currently studying in Canada. As peer-to-peer marketing is known to be particularly effective, alumni testimonials should also be featured prominently.

The world has undergone a digitization process. The Canadian embassy in Beijing's Weibo (the Chinese version of Twitter) currently has 300,000 members. We strongly believe that e-marketing has replaced the bricks and mortar approach, given its capacity to multiply the effectiveness of communication. As such, the panel urges investments in a leading-edge and centralized e-communication system.

This sophisticated operation should be carried out in three phases:

- 1. Information sharing: marketing and providing student advice (social networking)*
- 2. Integration with a pan-Canadian coordination centre for online student applications*
- 3. Integration with visa processing (CIC)*

The way forward: The panel recommends a thorough re-tooling and upgrading of the current website, which could be designed by a professional e-commerce company external to government. The enhancement of the website should be coupled with a greater use of social media platforms to communicate Canada's marketing messages, tailoring key messages for social media usages in specific priority countries.

A pan-Canadian coordination centre: In phase two, explore coordinating international student applications to Canadian institutions through the use of state-of-the-art information technology. Given provincial/territorial jurisdiction for education, a pan-Canadian coordination centre would best be facilitated by the CMEC.

In phase three, integration with visa processing would occur. This would require continued and strengthened collaboration between DFAIT and CIC.

CHAPTER 8: Investments

8.1 Scholarships for international undergraduate students

We recognize that the decision to pursue an international education can be a difficult and costly choice for a talented young undergraduate student to make. Scholarships can be a powerful tool to support the best and brightest undergraduate students in their studies in Canada. Furthermore, we believe that offering a strong suite of Canadian undergraduate scholarships will demonstrate to the world that Canada is open to accepting the world's top international students and helping them find the means to reach their educational goals. These scholarships must be highly competitive, providing an alluring incentive that excites the world's top talent about the opportunity to study and conduct research in Canada.

We acknowledge the impact of existing Government of Canada international scholarship programs, such as the Emerging Leaders in the Americas Program (ELAP), as well as the granting councils' fellowships. We also celebrate the work provinces/territories, individual institutions and the private sector have done to provide awards and financial support for international students. However, many of the submissions and interventions we received and heard suggested that, in general, current funding levels are not sufficient to be able to compete effectively with scholarships offered by our competitors.

We agree with the consensus that emerged during our engagement process, that we need to do more—a well-branded and well-funded scholarship mechanism should be a central tool of the international education strategy. Many stakeholders suggested that even a one-year entrance scholarship program for attracting the best international undergraduate students to begin their studies at Canada's universities, colleges and polytechnics would have a measurable impact. It was also raised that an undergraduate scholarship program could potentially be co-funded through collaboration between the federal government, provincial/territorial governments, institutions and the private sector, or even through partnerships with foreign governments working to send their students abroad.

We believe that provision of international scholarships reinforces Canada's international marketing and promotion initiatives and contributes to boosting Canada's visibility on the world stage. As described in a recent research paper written by Dr. Sheila Embleton and published by the CBIE: "Canadian branding and scholarship offerings can complement each other to recruit and retain international students who can help build [a] dynamic Canada."⁷²

International scholarships may also be used as a pathway for a longer stay in Canada. As new students, scholarship recipients will appreciate and celebrate Canada for recognizing their talent. These top students rewarded with a scholarship may decide to continue their studies in Canada, come back at a later date to pursue additional studies or research, and possibly consider Canada as a place to work once they have completed their studies. Upon graduation from Canadian institutions, these students can bear witness to Canada's education excellence and uphold that reputation as alumni, whether they are in Canada or abroad.

University of British Columbia: Supporting outstanding international students with scholarships

Every year, UBC allocates a portion of international undergraduate tuition fees to support awards for academically outstanding international students who could not otherwise attain a post-secondary education. These need-based awards, unique in size and number among Canadian universities, have enabled access to UBC for more than 200 scholars of exceptional academic and leadership potential from 70 different countries.

One of the programs, the International Student Humanitarian Award (ISHA), opens doors for deserving students from war-torn or severely impoverished regions of the world who have shown great determination to learn under highly challenging conditions. Candidates can be nominated by their secondary schools or by recognized international non-governmental organizations.

Since 2007, 16 ISHA scholars have studied at UBC. Karen McKellin, Director of UBC's International Student Initiative, speaks to the immense value ISHA students bring to the university and to Canada: "It is a privilege to host these outstanding and determined students. They are role models for their peers and enrich UBC's classroom, residence and social environments. Equipped with a first-class education and imbued with Canadian values of civic engagement and tolerance, ISHA scholars are empowered to make a difference in our world. These are the leaders of tomorrow and they will be life-long ambassadors for Canada, wherever their future takes them."



Ghanaian student, Regina Nyamekye, winner of a UBC International Student Humanitarian Award, received her Bachelor of Arts degree from UBC in 2011.

Photo courtesy of the University of British Columbia and Martin Dee.

Recommendation 9: Brand Canada through scholarships for international undergraduate students

As a means of attracting top talent at the beginning of their post-secondary education, and to compete more effectively with the major competitor countries for the best and brightest international students, the Government of Canada should provide co-funding for 8,000 new Canada Scholarships for top international undergraduate students to study at Canadian universities, colleges and polytechnics. It is anticipated that this investment will be matched by institutions and/or provinces/territories and private donors by a 2:1 ratio.

8.2 Research grants and scholarships

International graduate and doctorate students, post-doctoral fellows and scholars have the capacity to make valuable contributions to research and innovation in Canada's universities and research institutes. Canada also has a variety of programs to attract top international talent, but it may be difficult for an international student to find relevant information.

It is important to acknowledge that efforts to recruit at the graduate level and above are different from undergraduate recruitment efforts. On the part of institutions, the recruitment of international researchers is also labour-intensive and requires extensive efforts to showcase their excellence. Beyond the overall experience in Canada, graduate students and scholars are interested in the specific opportunities they can access in Canada, in terms of well-equipped research facilities, faculties and supervisors with expertise in their area of research, and potential funding for their studies and research.

The Vanier CGS and Banting Postdoctoral Fellowships represent major investments in attracting and retaining top research talent. Despite this investment, only 25 percent of the Vanier CGS and 31 percent of the Banting Postdoctoral Fellowships were awarded to international students in 2011–12. Many of the other awards funded under the Canada Graduate Scholarships program are not open to international researchers.

The Government of Canada also established a basis for funding international research talent through programs such as the Canada Excellence Research Chairs in 2010. CERC has awarded up to \$10 million over seven years to each of 19 chair holders who are active in leading research and innovation in areas that support Canada's S & T strategy. The Canada Research Chairs program also helps Canada recruit the world's highest-calibre researchers for leading innovation priorities by establishing 2,000 research professorships across the country with an investment of \$300 million per year. As of March 2012, nearly one quarter of holders of Canada Research Chairs were recruited from outside of Canada (including expatriate Canadians).⁷³

During the course of our work, we were fortunate to have the opportunity to meet with representatives of Canada's granting councils (NSERC, SSHRC and CIHR) who are responsible for the administration of many awards. It was noted that there is a significant amount of funding available to international students and researchers through the granting councils. However, the issue is that this funding is parceled out under a variety of programs, with no overarching branding or coordination to highlight their availability to international applicants.

A point that was also repeated during our consultations with stakeholders is that, although initial investments in grants and scholarships for international graduate students and post-doctorates are commendable, these programs must be expanded to compete more effectively with other destination countries. They must also be more effectively packaged and branded to carry the prestige that is sought after by international researchers.

This being said, Canadian stakeholders will work jointly to take advantage of specific opportunities. For example, the Government of Brazil launched the Science Without Borders (SWB) scholarship program in July 2011, with the goal of sending 75,000 Brazilian students to study internationally in areas of science and technology. During his visit to Brazil in April 2012, the Governor General announced that Canada will welcome 12,000 Brazil students. Canadian stakeholders worked collectively on this pan-Canadian approach, making Canada the second-largest beneficiary of the SWB program.

Several of our competitors have already invested heavily in long-standing, world-renowned award programs for international scholars. One of the most well-known is the U.S. Fulbright Program, which has funded more than 192,000 international graduate students and scholars in the United States since it was established in 1946.⁷⁴ The Chevening Scholarships is another example of a notable global scholarship program, awarded by the U.K. Foreign and Commonwealth Office (FCO) to more than 38,000 scholars since 1983.⁷⁵ More than 700 Chevening scholars have received funding to attend U.K. universities in 2011–12, and the program maintains a considerable alumni community in over 150 countries. Programs such as these exhibit the value of branding through scholarships to attract international talent and eventually create a network of alumni ambassadors across the globe.

Canada currently does not have its own prestige flagship program that top international students aspire to, but instead a series of programs dispersed through the federal government. Considerable funding is set aside for this purpose, but locating the scholarships can be a challenge for anyone who is not familiar with Canada's numerous programs. We see a need for Canada to have a unified flagship scholarship program that is recognized the world over.

Recommendation 10: Regroup grants and scholarships available to international graduate students and post-doctoral fellows under one label/brand with a focus on priority areas aligned with Canada's innovation and prosperity agenda

To enhance Canada's innovation and S & T strategy, existing funding available to international graduate students in the forms of grants/scholarships from various government agencies should be coordinated and, where necessary, repackaged in such a manner that allows effective promotion under the Canada brand.

Additional investment would allow Canada to leverage existing opportunities to attract top students by matching country-scholarship programs, such as the China Scholarship Council, the Brazilian Science Without Borders scholarships, or the Saudi Arabia King Abdullah scholarships. It will also enable Canada to compete with the key international scholarship countries such as the United States, the United Kingdom and Australia to attract top scholars and researchers.

The way forward: We recommend a better alignment of international research grants offered through Canada's granting councils with particular emphasis on a small number of priority countries. An inter-ministerial working group, with representatives from the granting councils and other government departments, could develop a coordinated strategy to re-package existing grants/scholarships to streamline the delivery of the various programs supporting international graduate and post-doctoral students, to ensure cohesive branding and that potential international students are made aware of these opportunities.

Ultimately, all international scholarships should be regrouped under one label/brand, such as Canada Scholarships, to manage all available resources to maximize Canada's brand recognition. At steady state, there should be sufficient funding (from existing grants and new investments) to enable the Government of Canada to provide 2,000 international graduate scholarships/grants and 1,000 post-doctoral fellowships per year under a unified brand.

8.3 Bilateral agreements

To attract top post-graduate students and researchers, Canada needs to make foreign institutions more aware of its research capabilities. One of the most effective ways to achieve this goal is to partner with them in joint R & D programs that involve students and researchers from both countries working together. In doing so, professors and top students become aware of Canada's research excellence, the innovative work of their Canadian counterparts, and potential funding opportunities that can be leveraged, thereby enticing them to conduct research in Canada.

This can best be accomplished through comprehensive agreements—involving not only governments but also educational institutions, education associations, granting councils and scholarship providers—to put in place country-specific strategies that meet the needs of each national partner.

The establishment of comprehensive and multifaceted bilateral agreements will not only attract top international students and researchers. Such bilateral agreements will also promote Canada as an innovative country with cutting-edge research facilities. Canada has the advantage of having world-class research facilities from coast to coast, in a diverse range of disciplines from agriculture to nanotechnology. Through these bilateral agreements, we promote Canada's brand abroad, but we also promote our excellence in research.

University of Ottawa: Providing research excellence through international collaboration

The University of Ottawa, the largest bilingual university in North America, has provided leadership in research among La Francophonie, both nationally and internationally. During the last 20 years, the University of Ottawa has developed numerous collaborations with other prestigious research institutions throughout the world, particularly in the francophone countries of Europe and Africa. The France-Canada Research Fund (FCRF) is a perfect example of these successful collaborations: it provides seed funding for promising research projects launched jointly by a Canadian and a French researcher. The FCRF also offers funding for study and research for students in both countries. Today, researchers count on the establishment of international networks and collaborations to stimulate their thinking, enrich their knowledge and multiply discoveries. Canada's International Education Strategy must continue to promote the growth of these partnerships.

In addition, bilateral agreements are mutually beneficial. To keep pace with cutting-edge research, Canada needs to actively participate in international research collaboration. Research brings benefits to Canadians in all spheres: health, environment, information and communications technologies, to name a few. This provides opportunities for the business sector through the commercialization of research, leading to important economic returns that support Canada's prosperity. Partner countries will also gain the same exposure, research and data. As we heard throughout our engagement process, international education has to be a two-way partnership in which both countries enjoy myriad benefits.

University of Guelph: Collaboration to promote environmental sustainability

A unique private/public partnership between the University of Guelph and the Kinross Gold Corporation was the catalyst for the Canada Brazil Research Network (CABRNET). The network provides enhanced research opportunities and knowledge sharing among Canadian and Brazilian partners, with an emphasis on interdisciplinarity and sustainability in the resource sector.

CABRNET collaborates with the private sector, universities, governments and communities to work toward common goals of promoting environmental sustainability, education and social development. These partnerships have facilitated research collaboration and access to communities, mine sites and fellow academics, while creating opportunities to enhance research, education and cross-cultural connections. Examples of current CABRNET projects include researching best practices in community engagement, minimizing grassland degradation and protecting biodiversity in the resource sector.

"It's these new collaborations among governments, business and civil society (including universities) that will fuel future innovation and foster connections across sectors and disciplines. CABRNET is an excellent example of this kind of synergy at work," said Lynne Mitchell, International Liaison Officer for the University of Guelph.

Moreover, research partnerships between Canadian and foreign institutions can make powerful contributions to the global economy. Research is being conducted around the world to address issues that are transnational in scope, such as climate change, natural disaster planning and disease. International research projects bring together knowledge and expertise from countries across the globe to learn more about these issues. These initiatives leverage national resources to collectively advance globally oriented solutions to challenges facing the world today and in the future.

We see the United Kingdom-India Education and Research Initiative (UKIERI) as an example of a research partnership model that is well-supported and mutually beneficial. UKIERI was initiated in 2006 to enhance educational links between the United Kingdom and India and committed more than £25 million (\$40 million) to support collaborations in the first phase of the program.⁷⁶ UKIERI achievements thus far include: 182 U.K.-India partnerships, across the strands of higher education and research, schools, and professional and technical skills, involving over 600 institutions; 55 individual awards through PhD scholarships and fellowships; the opportunity for 393 British students to visit India under the Study India Programme; and facilitating work placements for 105 Indian graduates.⁷⁷ Based on these achievements, U.K. Prime Minister David Cameron and Indian Prime Minister Manmohan Singh announced in 2010 that the program would be extended for five years, from 2011 to 2016.⁷⁸

It is important to note that there currently exists an array of international bilateral agreements for education and research collaboration. As a result of the provincial/territorial responsibility for education, agreements can be signed either at a federal or provincial/territorial level, depending on their purpose. For example, China has signed agreements with 9 of the 10 Canadian provinces. Also, many agreements exist at the institutional level or between Canadian and foreign associations. As previously mentioned, DFAIT, in partnership with partners and stakeholders, also signed two key memorandums of understanding, with India and Brazil, since 2010, leading to further co-operation in the fields of education and research. These bilateral agreements should be further promoted and leveraged, while ensuring that they encompass all aspects of education and that a whole-of-Canada approach is taken to implement them.

Recommendation 11: Develop comprehensive and multifaceted bilateral agreements with priority countries that focus on all aspects of graduate education and research, supported by appropriate levels of funding



From our benchmarking work, we have learned of comprehensive and multifaceted bilateral relationships developed by countries (such as the United Kingdom) with priority countries. The panel sees tremendous strategic value for Canada in developing such agreements and recognizes that relationships in the area of R & D already exist with some priority countries. The panel recommends that these elements be incorporated into more comprehensive, country-specific bilateral agreements with a focus on all aspects of graduate education and research, and that appropriate levels of funds be allocated to support such a strategy.

CHAPTER 9: Infrastructure and Support

9.1 Study permit processing

Throughout the engagement process, Citizenship and Immigration Canada was a central partner, given its pivotal role in implementing visa and immigration policies. Collaboratory participants called for speed and consistency in visa processing, without adversely affecting the integrity of the process of entering Canada. There was mention of needing to reduce the bottleneck of applications as well as needing greater coordination to manage projected increases in applicants in certain countries.

In terms of information gathering, three-way communication (between government, institutions and industry) could provide better per-sector data, allowing for benchmarking and a rapid response to fraud. The issue of medical coverage (and variance in pre-application medicals) was also discussed, with suggestions that provinces/territories cover the medical insurance for international students as an incentive to choose Canada (and their respective province/territory).

Longer-term engagement mechanisms were proposed to enhance performance. The visa officers' understanding of education in Canada and labour market needs must be constantly updated, given rapid changes in circumstances and variance by region/community. Longer-term retention strategies were also raised, specifically linking immigration policy and labour market needs.

Efforts to attract international students and researchers to Canada will be hampered without a coherent and well-supported visa system to process their entry. The international education strategy must ensure that efforts to recruit international students are congruent with CIC activities that maintain the integrity and quality of Canada's visa and immigration system, and are supportive of CIC's efforts to ensure competitive processing times and client service in light of growing volumes.

We must ensure that the strategy is aligned with immigration policies and that adequate resources exist for visa processing in support of Canada's International Education Strategy. The panel frequently heard, through consultations with various stakeholders, that the Government of Canada should ensure visa offices are adequately resourced to allow for the processing of increasing numbers of study permit applications. To ensure that Canada does not lose qualified applicants in a fast-paced and globally competitive environment, the panel recommends that the Government of Canada look at options to further support Canada's visa processing system.

CIC is an integrated network where funding is redirected to meet evolving pressures. CIC does not receive dedicated resources for the Temporary Resident (TR) program. With considerable growth in applications both in Canada and abroad for all lines of business and in spite of continuing modernization initiatives, the TR program has seen its processing times increase in some areas. Current processing times are seen as an impediment to Canada's

attractiveness for foreign nationals seeking to enter Canada temporarily, including international students, and as hindering Canada's economic growth. We believe that funding is required to adequately resource the network so that TR program processing times, including those for study permits, do not rise and service standards can be adjusted to a more competitive level.

CIC is responsive to the needs of resource pressures and is working on several initiatives to streamline applications and provide more enhanced tools. We have heard that global processing will enable CIC to address pressures via online file sharing and processing. Electronic applications to be introduced will ease the first step in an application without the requirement to visit an office abroad. CIC has implemented a global processing system that allows it to leverage its global network. In addition, it is preparing to roll out an e-suite of services geared to all temporary residents. The services will eventually allow for online submission of applications with online payment. Clients have better access to CIC services through the expanded use of the Visa Application Centre (VAC) network, which expands the CIC global network beyond the footprint of Canadian missions abroad. The number of VACs is planned to increase from the current 60 to up to 150 centres by 2014. We encourage the Government of Canada to build on the success of recent improvements—such as the launch of the Visa Exempt Study Permit Abroad project, which enables study permit applicants from 14 designated countries to submit applications online. By increasingly leveraging partnerships and emerging technology, CIC will continue to support the goal of making Canada a destination of choice for international students and researchers.

We suggest that it is time to review the study permit fee structure to ensure that Canada remains competitive without exceeding the cost of delivering the service. Canada has the lowest study permit fee among comparator countries the United States, the United Kingdom, Australia and New Zealand. At the moment, it seems that CIC is only recovering about 60 percent of the cost of the service through fees for study permits. The *Financial Administration Act* stipulates that the fee for services may not exceed the cost to deliver the services. Even if CIC were to contemplate full cost recovery for study permits, the resulting fee would still be lower than those of the United States, the United Kingdom and Australia.

We have learned that CIC is undertaking a review of all of its user fees in support of a commitment made under the federal government's Management Accountability Framework. Among other things, the review will examine the value of shifting more of the burden of the cost of offering the service from the taxpayer to the user of the service.

We must support initiatives that protect the integrity of Canada's international student program, with a view to improving processing outcomes and increasing the number of quality international students in Canada. Throughout the advisory panel's consultation process, much praise was given to CIC regarding the Student Partners Program (SPP), an administrative framework initially designed and implemented in partnership between the Canadian visa office in New Delhi and the Association of Canadian Community Colleges. Given the program's success, CIC is working toward the implementation of regulations that will ensure that the principles of the SPP—quality applicants, quality educational institutions and increased educational institution responsibility—can be applied to all Canadian education subsectors.

Student Partners Program

In 2008, the Association of Canadian Community Colleges and Citizenship and Immigration Canada were working together in India on a project to better prepare immigrants for their arrival in Canada. During that collaboration, ACCC expressed frustration that only 38 percent of Indian student applicants to Canadian colleges were being accepted and offered to collaborate to improve the approval rates and reduce the processing time.

The Minister-counsellor for CIC in New Delhi agreed to exchange information and develop a pilot program that could reduce processing time for CIC officers and raise the approval rates. It was called the Student Partners Program. During the ensuing discussions, the ACCC gained an appreciation for the difficult choices that CIC personnel had to make, and committed to streamline the applications by promoting a better understanding among Canadian colleges and their Indian agents for exactly what was needed by CIC and what were the minimum conditions required. ACCC colleges agreed to report to CIC which students were still in good standing after the fee-refund date, enabling visa officers to develop confidence in outcomes and helping both CIC and ACCC to identify problem areas and thus manage risk based on real data.

On its part, CIC became more aware of the variety of offerings that colleges had, including post-graduate certificates, which many Indian university graduates were applying for to gain the practical skills and experience needed to obtain employment. On the basis of this growing mutual understanding and annual calls between CIC and the 45 colleges participating, approval rates moved up from 38 percent to 78 percent in less than two years and processing times dropped as the quality of the applications increased. As the word spread about the SPP, it led to a huge increase in accepted applications, going from around 1,500 to over 10,000 in three years.

“If we want to attract more and better international students, government departments and non-government associations need to collaborate in new and more effective ways. The SPP provides living proof of the value of these new types of collaborations,” comments Paul Brennan, Vice-President of International Partnerships, ACCC.

The Government of Canada, in co-operation with provinces/territories, should continue to work to ensure that only genuine, quality educational institutions have access to international students. Canadian educational institutions also have a role to play in seeking high-quality applicants, providing decisions that allow for adequate visa processing timelines and ensuring that once in Canada these persons attend the institutions that admitted them. A regular quality review on the part of institutions would assist them to fine-tune their recruitment and admissions strategies, to ensure that Canada is attracting genuine international students who have the best potential to succeed both during and after their studies. Additionally, data on international student enrolment and drop-out rates would support CIC processing efforts by allowing visa officers to better estimate and manage risk based on actual program compliance information.

It is important to align international education promotion and recruitment efforts abroad with actual study permit application outcomes, including approval and refusal rates. In target countries with lower approval rates, it is important to work toward understanding underlying reasons for refusal, and to adjust promotion and recruitment strategies accordingly (e.g. in some countries, promotional efforts may need to better identify and attract niche markets that are more likely to meet CIC requirements to study in Canada). Better coordination is needed between DFAIT and CIC both at the policy level and on the ground in order to increase data and information sharing, ensure a common federal approach to the attraction of international students and align promotional efforts and study permit visa issuance.

Recommendation 12: Improve education visa processing to provide consistent and timely processing of high-quality candidates

Aggressive processing time targets should be established, especially in key markets, to compete with other competitor countries and jurisdictions. CIC needs to increase staffing levels to accomplish this goal. Funding support for this activity should come from visa fees collected from the applicants.

Efforts to attract international students and researchers to Canada will be hampered without a coherent and well-supported visa system to process their entry. The panel stresses that efforts to recruit international students must be congruent with CIC activities.

It is of national importance that the integrity and quality of the visa and immigration system be maintained. CIC must be supported in efforts to ensure competitive processing times and client service in the face of growing volumes. Meeting this processing demand will put pressure on visa officers, requiring an increase in staffing levels and a need for enhanced or further training.

The way forward: The panel recommends that visa offices be adequately resourced to allow the processing of increased numbers of study permit applications. This will require additional operating funds. A review of the fees charged for study permits, which are significantly lower than our competitors, should be considered.

9.2 Training for international education representatives

We believe Canada is well positioned to endorse a professional culture of excellence in launching the international education strategy. Quality is at the core of the education offer and the brand position. This should be equally true of the individuals engaged in international education initiatives for Canada.

The complex and diverse range of skills required of professionals in this field should not be underestimated. The skills include intercultural communications; an understanding of the comprehensive education offer across all sectors and regions of Canada; knowledge of legislative jurisdiction, labour market synergies and global trends; public speaking abilities; marketing expertise; research analysis; awareness of immigration procedures; and at times, international negotiation skills in business relationships.

For internationalization efforts to succeed on campus, a deep knowledge of support services is required for international students, including new Canadians and Canadian students on exchange. International educators must be aware of issues and prepared to deliver support services in areas such as:

- preparing for cultural adaptation,
- supporting internationalization and cross-cultural learning in the classroom,
- mental health,
- risk management,
- culture shock,
- immigration and health advising,

- preparing for work in a different cultural context,
- supporting students in their understanding of personal skill development and growth through international experiences, and
- creating supportive integration networks on- and off-campus.

International education is a field with rapidly changing influences and a requirement that professionals adapt and constantly update their knowledge.

The best professional development opportunity for international education professionals is the exchange of information and expertise between embassy staff supporting in-country promotion efforts, visa staff, in-country education experts and international educators or officials who can offer in-depth knowledge of the education offer. An underlying principle in this exchange is the ongoing professional development expected in the education sector to ensure representatives are providing the most accurate, informed and useful intelligence and that in return, students choosing Canada will experience the highest quality of support when studying in Canada.

The panel quickly realized the depth of expertise at institutions, associations and throughout government departments. Many individuals have been engaged in international education and have been globally recognized as leaders by their peers. Greater emphasis has been placed on internationalization initiatives in the education sector. However, professional development has been uneven and there is a significant opportunity to share best practices and establish a high bar across Canada for top-quality professionalism. In addition to formal learning initiatives, secondment and job shadowing may provide strong opportunities for expanding awareness of international education issues.

Existing professional development occurs in the following areas but could be better coordinated for a pan-Canadian standard:

- **Brand training** is available online for government officials who are delivering branded activities as well as for any individual at an eligible institution in Canada that wishes to become authorized to use the brand. Currently, more than 200 individuals have been trained across Canada, as well as many visa officers and all DFAIT education officers abroad.
- **Professional development in international education.** Conferences and networks offered by most of the international education associations in Canada and abroad offer opportunities for professional development. Networking at events that offer high-quality workshops are invaluable for both formal and informal information sharing. A review of existing training opportunities and coordination of comprehensive, progressive workshops would further support new staff as well as senior representatives seeking enhanced professional development in the field of international education in Canada.
- **Sharing of best practices and online webinars** are a growing trend in providing current, accessible and cost-effective professional development. On any given week, international organizations are offering webinars or sending reports on international education issues. Canada is initiating a pilot project specifically for education agents—a self-paced module with final examinations—to ensure that accurate information is shared and the importance of professional integrity is strengthened as we engage with this influential audience.
- **Sharing the education offer.** The Government of Canada, through DFAIT, supports webinars to education and immigration officers, whereby education associations present on their specific niche to ensure that officers have the most accurate information on education options, pathways and activities of associations. This facilitates an important dialogue to address questions and ensure ongoing learning opportunities.

- **Research and intelligence sharing.** DFAIT works with provinces/territories and education associations to circulate market intelligence and media stories as they are generated. There is a desire to leverage a digital communications strategy for Canadian representatives to most effectively share news and updates with interested parties across Canada. DFAIT is responsible for funding, initiating and coordinating market reports (currently more than 100) as well as the coordination and delivery of pan-Canadian research and reports, such as the *Economic Impact of International Education*, *Canada's Capacity for International Student Enrollment Report*, and public opinion research on the brand and best practices related to international education initiatives. These are shared with the education sector across Canada through the National Education Marketing Roundtable, held twice annually with government and international education representatives, as well as online through a portal for education professionals in Canada, [Edu-Canada Pro](#), which provides information and market research to Canadians doing business abroad.

Canadian Bureau for International Education: Fostering networks between Canada and the world

In November 2011, the Canadian Bureau for International Education organized a highly successful Canada-Arab Education Forum. The forum, held in Ottawa, attracted 180 senior leaders and professionals in education, government and the private sector from across Canada and 23 countries in the Middle East and North Africa. The forum was part of a CBIE pre-conference series, initiated in 2007 and offered in collaboration with DFAIT, which aims to connect Canadian colleges, Cegeps, institutes and universities with new partners from a specific country or region.

Participants engaged in dialogue on partnership opportunities in the areas of scholarships and student support; education-industry collaboration; science and technology; centres of excellence; and practical ways of improving student learning outcomes. Networking meetings were held throughout CBIE's annual conference, which followed the forum and continued afterwards, and many Arab world participants also visited educational institutions and government agencies. "CBIE was gratified that its 2011 Arab Forum—a high-profile element of our 45th national conference—heightened awareness of opportunities and of how to build effective partnerships between Canadian institutions and their counterparts in the region," says Karen McBride, President and CEO, CBIE.



Participants at the Canada-Arab Education Forum in November 2011. Photo courtesy of the CBIE.

Queen's University: International Educators Training Program

The International Educators Training Program (IETP) was established in 2003 by the Queen's University International Centre to offer professional development to staff working in the field of international education. The program has expanded to offer a summer institute, an online certificate in partnership with the Queen's University Faculty of Education, and courses and workshops on college and university campuses and at international education conferences across Canada. Participants can enhance their skills and knowledge in areas such as intercultural communications, international mobility support programs, mental health programs, risk-management policies and practices, immigration advising, marketing and promotion, and internationalization of the campus. The Certificate for International Education Professionals combines online and face-to-face learning to provide participants with a progressive and well-rounded approach to their professional development.

Recommendation 13: Expand and facilitate comprehensive training for staff at Canadian embassies and offices abroad on Canada’s diverse education offerings and study pathways. Training opportunities should also be available for stakeholders to gain a deeper understanding of both the programs and cultural support required by international students

A two-way flow of information is required to ensure quality control and management of capacity. Given frequent changes to visa policies, it may be helpful to provide learning opportunities where experts from the education sector can come together with visa officers abroad. Visa and trade officers would benefit from training to gain a clear and detailed understanding of the education offering in Canada. Overarching lessons learned could be shared with the broader community via targeted workshops or webinars. The underlining objective of the training is to ensure that qualified applicants obtain their visas and that students have a quality experience that is supported by adequate services.

9.3 Canadian Experience Class

Immigration via international education can bring tremendous value to Canada, especially if matched with skills gaps. We believe that it is one of the safest immigration paths, as students can demonstrate their capabilities to adapt and succeed through their education period. This facilitates their integration into Canada’s workforce and is an important incentive to study and conduct research in Canada.

Highly qualified and skilled people who will contribute to innovation and creative academic–private initiatives are a critical element to a successful economy. Canada is already facing a skills shortage that will require collaboration between federal jurisdictions (CIC, HRSDC and DFAIT) to ensure Canada attracts and retains talented immigrants despite strong global competition for top talent. An international education strategy for Canada should strongly align and engage with existing immigration and labour market programs and priorities to ensure Canadian prosperity. Not all international students should or might wish to stay in Canada, but we must endeavour to attract and retain talented, qualified individuals who benefit from their education experience in Canada and who wish to contribute in key areas of Canada’s labour market.

Under the Post-Graduation Work Permit Program, eligible students can receive a work permit for up to three years in Canada upon successful completion of studies. The Canadian Experience Class (CEC) allows graduates of eligible post-secondary institutions with at least one year of work experience to apply for permanent resident status, with the possibility of applying for Canadian citizenship three years later. In 2011, just over 6,000 foreign nationals transitioned to permanent resident status through the CEC and approximately 50 percent of those were former international students. Other international students transition to permanent resident status through the student stream of Provincial Nominee Programs, offered by some provincial governments. International students represent approximately seven percent of total transitions to permanent residency through this program. CIC has confirmed that there is scope within the CEC program resources to attract greater numbers of eligible applicants. This provides a significant opportunity to promote this pathway to attract those scholars and highly qualified, skilled talent who are most likely to succeed in transitioning from their education to work experience in Canada.

Université de Moncton: Attracting and retaining skilled international students

Since the beginning of the last decade, with the goal of counterbalancing the population decrease in New Brunswick, the Université de Moncton (U de M) has turned to international recruitment. As of last year, it has seen a growth of nearly 500 percent in international student numbers over the previous 10 years. The benefits of the arrival of these students far exceed simple numbers, extending beyond the walls of the university.

Ranging from the campus in Moncton to those in Edmundston and Shippagan, these new arrivals allow New Brunswick's youth, often from rural areas, to open themselves to different cultures. International students contribute equally to cultural richness as they do to economic growth in Moncton, their host community, as well as in New Brunswick and the whole of Canada. Many international students choose U de M for the opportunity to study in French in a bilingual environment, which results in many students graduating with a quality education and a high level of bilingualism.

Many of these students also choose to stay in New Brunswick after finishing their studies. The City of Moncton, in collaboration with U de M, has recently undertaken a project to integrate international students. In the context of population decline, local employers do not have to look far to find qualified workers who will contribute to the development of the country as a whole.



Photo courtesy of the Université de Moncton.

Recommendation 14: Support the expansion and promotion of the existing Canadian Experience Class program to contribute to Canada's skilled immigrant and labour market needs

The Canadian Experience Class can be better promoted and leveraged to retain graduates from eligible institutions and post-secondary programs who have at least one year of work experience in Canada in a managerial, professional, technical or trade occupation after graduation.

CHAPTER 10: Spirit of Engagement

During our consultation and engagement process, we, the advisory panel, engaged with the Canadian community of experts and practitioners engaged in international education to chart the course to work together in a coherent and cohesive fashion. We have acknowledged good will and support from all partners and stakeholders. In our view, this engagement should be ongoing. We must also anticipate future trends, manage risks and conduct ourselves in a way that reflects our values.

The panel sees a need for all contributions to be acknowledged and for existing partnerships to be renewed to avoid the duplication of efforts. In our original mandate, we were asked to set out the contributions of all partners. We have thus looked to the future to scope out potential roles. The best results will come from leveraging our collective strengths to maximize the benefits to Canada's long-term prosperity.

10.1 Setting out the contributions of all partners

10.1.1 Government of Canada

The Government of Canada has a central role to play in coordinating the overall strategy. For the reasons mentioned in this report, we envision DFAIT taking the lead in establishing and supporting the Council on International Education and Research, which will establish the policies and directions for the implementation of the strategy, including periodic review of priority markets in consultation with the provinces/territories, as well as with CIC.

Several tasks would fall under the purview of DFAIT, including co-managing the evolution of the *Imagine Education au/in Canada* brand with CMEC; coordinating the strategy and Canada's presence at marketing initiatives via the network of embassies and offices abroad; as well as providing training for trade and visa officers, and recruiters.

Further, there are several responsibilities that the panel potentially sees DFAIT, partnering with other organizations, delivering. These include managing the content, executing and hosting the e-communication platform; gathering and disseminating timely market intelligence; and coordinating the Canada presence at key education events and fairs.

We acknowledge the critical role of CIC in the management of the study permit system, with a keen eye to fraud prevention. However, there are opportunities to improve data mining, as information is essential for better market intelligence and forecasting of trends. Specifically, granular data that is non-aggregated by subsector and program would be particularly useful. CIC plays a pivotal role in managing the transition from international student to permanent resident via programs such as the Canadian Experience Class. CIC also provides important opportunities for skilled and qualified international students to gain relevant Canadian work experience during their studies, through

initiatives such as the Off-Campus Work Permit Program—these programs can be very attractive to international students. Lastly, the panel recognizes the policy innovation that CIC has led by embracing new approaches and establishing pilots, such as the Student Partners Program in partnership with ACCC.

We anticipate a continuing role for the granting councils, which foster research and innovation. We would like to see an alignment of funding allocations with identified priority markets. All funding allocations for international students should be gathered and re-branded under a “Canada” umbrella for greater impact and recognition of Canada as the place to study and conduct world-class research.

The panel also sees a need for HRSDC to be informed as to the direction of the strategy, to ensure information related to identifying labour market needs is part of future planning.

10.1.2 Provincial/territorial governments and CMEC

The panel views provincial/territorial governments and CMEC working in close coordination with the Government of Canada to deliver the strategy as partners. Provinces/territories are best positioned to identify their strengths, priorities and capacity for growth. More importantly, they have the jurisdiction to do so. The provinces/territories will continue to co-manage the *Imagine Education au/in Canada* brand with DFAIT.

There was agreement from consulted stakeholders that maintaining quality was paramount. Gathering information related to quality-assurance systems clearly falls within CMEC’s purview. CMEC should continue its efforts to clearly communicate the robustness of these mechanisms. Relatedly, the Canadian Information Centre for International Credentials plays a key role in gathering and maintaining a database of programs.

As appropriate, the provinces/territories will have the option to allocate funds to scholarships to leverage the federal investment to attract international students. Provinces/territories may want to consider covering health-care insurance costs for international students, as international students we met with raised this issue as a complicating factor while studying in Canada.

Lastly, provinces and territories also manage their own provincial nominee programs to nominate immigrants who wish to settle within them.

10.1.3 Education associations

We took note of the current work of the Canadian Consortium on International Education Marketing, specifically with respect to its focus on developing education pathways. We believe associations are ideally positioned to play a key role in gathering and sharing best practices related to internationalization for practitioners.

The strength of associations is research and gathering information. We believe more information and statistics on internationalization in Canada (e.g. Canadian student mobility, internationalization of the curriculum, knowledge exports, research partnerships, exchange partnerships) could improve the implementation of the strategy by identifying key trends. Up-to-date information must be easily accessible to inform policy decisions.

Languages Canada: Supporting research on international students in Canada

Languages Canada, representing the Canadian language training sector, is undertaking an initiative to support research into factors affecting academic performance of international students. The landscape of international education is changing. As the sector grows and evolves it has an increasing impact on Canadian education systems. While we know there are factors that affect academic performance and success (e.g. linguistic proficiency), the necessary research to pinpoint these factors and their thresholds does not exist. Languages Canada is collaborating with the Illuminate Consulting Group (ICG) to establish a benchmarking mechanism that will provide the necessary data and analysis needed to understand how international students can be supported to achieve the high-quality academic results for which Canada is renowned. A cross-national, cross-institutional benchmark model of international students' success and performance (PRISM) was launched by the ICG at the 2012 NAFSA Annual Conference & Expo, North America's largest educational event. Languages Canada presented on the role of second language in the Canadian educational context and will be involved with PRISM as it unfolds and provides a solid basis for continuous quality improvement.

Building on the strength of the data gathered, best practices related to student support services could be shared via practitioner workshops (also a core mandate of associations). A supporting role (peer-to-peer mentoring) could be crafted to help manage risks.

Associations can also combine their membership to reduce the number of individual delegations going on promotional missions to key markets. The associations could also identify international activities carried out by the Canadian education sector that may not be known to other stakeholders including governments.

Education and Training/Formation Atlantic: Fostering collaboration among education providers in Atlantic Canada

The members of Education and Training/Formation Atlantic (ET/FA), a non-profit association of Atlantic Canada-based organizations and provincial and federal government representatives, recently created an asset map of the education and training sector's exportable expertise. The provinces of Newfoundland and Labrador, New Brunswick, Prince Edward Island and in Nova Scotia, EduNova, partnered with the Atlantic Canada Opportunities Agency to fund the project. The purpose of the asset map is to foster collaboration and partnerships among ET/FA members and to catalogue the international activities and contacts of public and private education and training providers in Atlantic Canada.

ET/FA members identified 98 education and training providers in Atlantic Canada and, of these, 89 organizations agreed to participate in the mapping project. The asset map project is in its pilot year, with additional information still to be added. The initial launch of the asset map lists 419 international linkages that exist with 700 partners in 133 countries and 126 sectors/academic fields. International linkages are grouped by country and type; therefore, there are in fact many more than 419 linkages. In addition, the map contains 347 international projects that took place in 133 countries, in 150 sectors/academic fields and involving 291 partners (national and international).

Polytechnics Canada: Representing the strengths of members across Canada

Polytechnics Canada members teach and train more than 15,000 international students and carry the Edu-Canada brand. Representing Canadian research-intensive colleges and institutes that also offer undergraduate degrees, the current nine members of Polytechnics Canada provide high-quality education and training, pathways to employment as well as further study for all their learners.

Polytechnics Canada represents publicly funded colleges and institutes of technology located in key economic regions of Canada. International demand is increasing for Bachelor's degrees and one-year graduate certificates at polytechnics—both of which have a strong component of practicum and work placements built into the learning. Polytechnics Canada speaks for its members to ensure they are well represented in Canada's international education promotion efforts.

10.1.4 Institutions

The panel recognizes that institutions brand themselves and actively recruit international students and researchers. We see a need for greater focus on credit transfer agreements with partner institutions abroad to facilitate student mobility. On a daily basis, institutions are the ones who must deliver a quality experience for international students. For example, practically speaking, institutions might be able to extend their application period to reduce visa application bottleneck by spreading out applications.

All institutions in Canada have an important role to play in creating global citizens by fostering global mindedness. Further, institutions can also educate their local community as to the value and importance of international students, encouraging and providing the ground for an integrated and welcoming approach.

Institutions must continue to create strategic partnerships—institution to institution, person to person—for academic exchange and research innovation.

Canada's public schools: Developing global citizens

The Pembina Trails School Division in Winnipeg established its International Student Program in 1995. Since the beginning of the program, international students have been hosted in homestays. Many of these students return to Winnipeg to visit their former homestay family and friends, and homestay families often travel to their student's country to visit as well. A number of students who graduated from secondary schools in the Pembina Trails School Division have gone on to pursue their post-secondary education at the University of Manitoba. Recently, the division has partnered with the University of Manitoba to provide a "pathway" to help international students transition from Pembina Trails schools to university.

The Calgary Board of Education's (CBE) commitment to international education is embedded in the CBE Global Learning Strategy. One of the guiding principles of the strategy is "that international, intercultural and global competencies develop through the practice and subsequent reflection of engaging with people, languages and experiences, diverse in scope and nature." Support for these kinds of experiential and inquiry-based learning opportunities, with the globe in mind, are demonstrated through the CBE's International Youth Leadership summits in Calgary and in China, as well as through the school board's International Certificate. More than 300 CBE students have participated in one of these summits to date, with meaningful relationships being established with the International School of Macau, Beijing Experimental High School, the Canadian International School of Beijing and Chongqing High School.

Given the richness of knowledge within education associations and institutions, the panel sees great potential for job shadowing and secondments, from the education sector to the Government of Canada, to enable the mutual sharing of ideas and expertise and foster greater co-operation.

10.1.5 Industry

The panel reached out to the private sector, specifically to human resource professionals and the Canadian Council of Chief Executives (CCCE), to gather information related to their current and future labour market needs.

The panel sees a need for greater exchange with the private sector, which can foster the culture of excellence among young people. There is scope for the sector to contribute to scholarships (for Canadians to go abroad or for international students to come to Canada). Further, by offering to host students for internships (in Canada and abroad), the private sector is a partner of choice in developing globally minded talent.

Ongoing exchange is required to clarify the skill sets needed to ensure Canada's prosperity is not hampered by labour shortages.



Canadian Council of Chief Executives: Supporting education and research linkages

The Canadian Council of Chief Executives (CCCE) recognizes that Canada's International Education Strategy will complement efforts to open up new trade opportunities for Canadian business. Among these efforts are two CEO forums, one for India and the other for Brazil. Composed of chief executives from leading small, medium- and large-sized enterprises, the Canadian forum teams plan to focus on encouraging investment and trade in a number of sectors and fostering research, innovation and education linkages with their counterparts in India and Brazil. The objective will be to identify concrete, pragmatic policy priorities to enhance commercial relations as well as establish a number of concrete private-sector projects in each country.

As Sam Boutziouvis, CCCE's Vice-President of Policy, International and Fiscal Issues, describes: "Our future prosperity will increasingly depend upon the intensification of knowledge and innovation exchanges. The economic activity generated in Canada from international students alone is greater than the activity generated from some of our resource exports. Greater international knowledge and innovation exchanges will also directly benefit the Canadian economy. The Canadian private sector is already co-operating with a number of academic institutions globally on a number of research projects. There is room to do more to catalyze these efforts."

CHAPTER 11: Conclusion

We were honoured to be asked to serve on the Advisory Panel on Canada's International Education Strategy. We were struck by the breadth and depth of current engagement by partners and stakeholders.

In our view, Canada already has strong foundations in international education. Our institutions offer high quality in all subsectors. Provincial/territorial jurisdiction has allowed for the development of a rich and diverse educational landscape.

For Canada to achieve its goals, we do not see the need for a major overhaul. It is clear to us that collectively, the efforts of provinces/territories, education associations and institutions are putting Canada on the right path. Rather, we see the need for course corrections so that Canada does not stray from that path. Some changes are required, mainly regarding the coordination of promotional efforts to ensure they are cohesive and coherent, as well as more extensive use of digital strategies. Further, governments, both federal and provincial/territorial, must ensure there is an alignment of education, labour market and immigration policies.

Again, the panel recognizes recent Government of Canada investments related to international education, including specific funding allocations to revise the international education strategy. The extent to which Canada can seize this current moment and become a leader in international education is commensurate with the investment we, as a country, are prepared to make to support internationalization efforts at all levels.

This report has highlighted the many benefits of international education, both economic and societal. In the global knowledge economy, how we manage international education will affect the course of our economic prosperity as well as our place in the world. The diplomacy of knowledge is powerful and can be a tool for Canada to achieve its goals.

As the Government of Canada implements the international education strategy, targets for success, the doubling of international student numbers by 2022 and the increase in opportunities for Canadian students to study abroad, are achievable given Canada's capacity and a strong willingness to ensure greater international exposure for Canadian students.

Policy coordination and sustaining quality will be required to ensure that growth occurs in a manageable way without threatening our greatest asset: the quality of our education offering. Our success will be marked by coming together to promote *Imagine Education in/au Canada* in a way that is responsive to new media and clear to an international audience: *Canada* is the brand.

Finally, greater investments in scholarships will propel Canada forward in its quest to attract top talent and achieve our goal of making international education a key driver of Canada's future prosperity.

ANNEX A: Research that Informed Our Recommendations

The following research pieces were commissioned by DFAIT in order to support our deliberations. We wish to acknowledge the work done by Roslyn Kunin & Associates, Inc. and the Illuminate Consulting Group to produce this research.

Economic impact of international education in Canada—an update

Roslyn Kunin & Associates, Inc.

This report suggests that, in 2010, international students in Canada spent in excess of \$7.7 billion on tuition, accommodation and discretionary spending (up from \$6.5 billion in 2008). More than \$6.9 billion of this revenue was generated by the 218,200 long-term international students in Canada, of which 37 percent came from China and South Korea. In addition, short-term language students contributed \$788 million to the Canadian economy. When accounting for additional tourism benefits from international students, the report finds that the expenditure resulting from international students in 2010 was \$8.0 billion, which translates to 86,570 jobs and \$455 million in government tax revenue. The full report is available at: www.international.gc.ca/education/report-rapport/economic-impact-economique/index.aspx?lang=eng&view=d

Canada's capacity for international student enrollment

Illuminate Consulting Group

Overall, this report found that Canada displays no notable capacity issues regarding international post-secondary education students at a national level. According to 2009 data, international students comprise 7.5 percent of post-secondary enrolment at the national level (compared to 23.2 percent in Australia) and only 0.7 percent of K-12 enrolment. These enrolment ratios vary only slightly across provinces. In some smaller provinces (population-wise), the ratio is very low in international comparison (and relative to larger provinces), allowing for sustainable growth opportunities. Projecting a high-growth scenario (if domestic enrolment were to grow at its average rate over the last five years and international enrolment were to grow at 10.0 percent year-over-year), international students would account for 17.3 percent of total post-secondary enrolment in Canada by 2020. The report concludes that given the strong international student growth dynamics since 2008, the issue to be faced is not capacity itself, but how capacity is being managed to maintain Canada's reputation for quality. The full report is available at: www.international.gc.ca/education/capacity_report-rapport_sur_les_capacites.aspx?view=d

We also wish to recognize the findings of previous panels who advised the Government of Canada in recent years on the areas of commercialization, economic competitiveness, and R & D. The thrust of our recommendations, that talent and innovation are key drivers of Canada's prosperity, are shared in the themes identified by these panels.

Review of federal support to research and development

In Budget 2010, *Leading the Way on Jobs and Growth*, the Government of Canada announced a comprehensive review of support for R & D in order to optimize its contributions to innovation and related economic opportunities for business. An expert panel was appointed by the Minister of State (Science and Technology) to conduct this review. In its report, *Innovation Canada: A Call to Action*, the panel notes the necessity of talent to stimulate innovation in Canada.

(Excerpt from *Innovation Canada: A Call to Action*)

Innovation input: Talented, educated and entrepreneurial people

Canada's future as an innovation-based economy depends on ensuring there are sufficient numbers of talented, educated and entrepreneurial people. The primary source of such talent is our public post-secondary education institutions: the universities, polytechnics and community colleges (including Cegeps in Quebec) that produce the innovators and those who support innovative activity. These institutions are primarily funded through the provinces, although the federal government plays a role through transfer payments, student financial assistance and direct support for research training and innovation skills enhancement. The diversity of higher-education institutions with varying missions and mandates provides Canada with the highly qualified and skilled people who are the bedrock of innovation. Each of these post-secondary education institutions has a unique role to play, producing workers for different components of the innovation ecosystem. Our university graduate programs produce the advanced Master's and PhD degree holders who can contribute breakthrough ideas that can ensure companies stay at the cutting edge of R & D; our universities and colleges produce Bachelor's degree holders who are often the front-line innovation performers; and our colleges produce technicians and technologists to facilitate the commercialization efforts of the firm.

It is the interplay among these complementary types of talent that builds an innovation economy. Since Canada's innovation gap is partly an education gap, improving our global performance will require the right mix in both the quantity and quality of talent. This demands a collaborative approach that brings together our post-secondary institutions, federal and provincial agencies as well as industry and other partners to ensure appropriate recruitment, training and deployment for industrial innovation needs. While Canada ranks first in the OECD for the percentage of its population with post-secondary attainment, it is middle of the pack in baccalaureate output and near the bottom for the number of doctoral graduates per capita. It is nevertheless encouraging that the growth in the number of doctoral degrees granted in Canada has been stronger—particularly in science and engineering—than in most comparable countries over the 2005–08 period, helping to improve our relative position.

The earnings advantage of individuals with advanced degrees (relative to high-school graduates) is less pronounced in Canada than in the United States. This is one indicator of relatively weaker demand by businesses in Canada for people with advanced degrees, and a situation consistent with a weaker commitment to innovation-based strategies by Canadian businesses. Statistics Canada has found that up to one fifth of doctoral graduates intend to leave Canada following completion of their degrees. When they go, these graduates take with them knowledge and skills that could contribute to a more innovative and prosperous future for Canada.

Students learn not only through traditional classroom experiences, but also through hands-on research experience that exposes them to the realities of the business world and teaches the professional and entrepreneurship skills needed to fully contribute to their eventual workplaces. Employers see programs

that encourage post-secondary student participation in research projects with business as having a number of benefits, including (i) the chance to identify the best recruits, (ii) the ability to influence curricula to be more industry-relevant, (iii) exposure to new ideas and specialized equipment in educational institutions and (iv) access to a flexible workforce.

While domestic production of innovation workers is an imperative, demographic realities dictate that this is not sufficient to meet the expected industry demand. By some estimates, within 20 years there could be almost two million vacancies for skilled knowledge workers in Ontario alone. An immigration system that targets necessary skill sets presents Canada with an opportunity to leverage the skills, insights and entrepreneurial talents of those born in other countries who come to Canada.

Competition Policy Review Panel

The Competition Policy Review Panel was named by the ministers of Industry and Finance in July 2007. The panel was mandated to review Canada's competition and foreign investment policies and to make recommendations to the government for making Canada more competitive in the global marketplace. Among the many recommendations made in its 2008 report, *Compete to Win*, the panel recognizes the importance of promoting the two-way flow of talent, as seen in the recommendations excerpted below.

(Excerpt from *Compete to Win*)

Attracting and developing talent

The Panel recommends that:

24. Post-secondary education institutions should pursue global excellence through greater specialization, focusing on strategies to cultivate and attract top international talent, especially in the fields of math, science and business.

25. Governments should use all the mechanisms at their disposal to encourage post-secondary education institutions to collaborate more closely with the business community, cultivating partnerships and exchanges in order to enhance institutional governance, curriculum development and community engagement.

[...]

27. Governments should provide incentives and undertake measures to both attract more international students to Canada's post-secondary institutions and send more Canadian students on international study exchanges.

28. Governments should strive to increase Canada's global share of foreign students, and set a goal of doubling Canada's number of international students within a decade.

29. Governments, post-secondary education institutions and national post-secondary education associations should undertake regular evaluations, measure progress and report publicly on improvements in business-academic collaboration, participation in coop programs, and the attraction and retention of international talent.

Expert Panel on Commercialization

The Expert Panel on Commercialization was named by the Minister of Industry in May 2005, with the mandate to identify how the Government of Canada could help ensure continuous improvement in Canada's commercialization performance. The panel's recommendations focused on three areas: talent, research and capital. The following is an excerpt on talent from its 2006 report, *People and Excellence: The Heart of Successful Commercialization*.

(Excerpted from *People and Excellence: The Heart of Successful Commercialization*)

Recommendation

Develop and Retain Talent for Success in a Global Marketplace

Proposal

We recommend that the federal government take action to attract skilled and talented individuals to Canada to support commercialization and to link Canadian students, businesses and researchers to global activity that is expanding knowledge.

Create a talent and research fund for international study

This fund will:

- create a set of Maple Leaf Graduate Scholarships to compete with the prestige of the Fulbright and Rhodes scholarships and attract more of the world's finest minds to this country's campuses;
- bring foreign research and teaching collaborators to Canada to serve as distinguished visiting chairs in disciplines that are strategic priorities for Canada and support its commercialization goals;
- provide matching grants for collaborative research projects with researchers in centres of excellence in other countries;
- support short-term exchanges of researchers between Canadian and foreign universities; and
- significantly increase the number of Canadian students conducting studies and research at foreign universities, thereby gaining exposure to other cultures and markets.

This fund should be administered by the Government of Canada's granting councils.

Encourage international students to stay in Canada

Like other countries, Canada should change its immigration policies to make it easier for international students, particularly those in advanced studies, to work while they are studying here and to remain in Canada after graduation. We are pleased to see that pilot projects to address this need have been announced, and look forward to their full availability across Canada. That said, we feel that more aggressive action is required to ensure that international students with advanced degrees from Canadian universities can stay and work in Canada.

ANNEX B: Biographies of Panel Members

Amit Chakma

President and Vice-Chancellor, Western University (Panel Chair)

Amit Chakma (Panel Chair) is president and vice-chancellor of Western University. Dr. Chakma joined Western from the University of Waterloo, where, from 2001 to 2009, he was vice-president (academic) and provost, and a professor in the Department of Chemical Engineering. Before that he was dean of engineering and then vice-president (research) and international liaison officer at the University of Regina. He began his academic career as a professor of chemical and petroleum engineering at the University of Calgary. Dr. Chakma is a graduate of the Algerian Petroleum Institute (Engineering Diploma, 1982) and the University of British Columbia (MAsc, 1984, and PhD [Chemical Engineering], 1987). In addition to his roles at Western, Mr. Chakma currently serves as vice-chair of the World University Service of Canada.

André Bisson

Chair of the Board, Centre for Interuniversity Research and Analysis of Organizations, Lead director, Transat A.T., and Chancellor Emeritus, Université de Montréal

André Bisson is chairman of the board of the Centre for Interuniversity Research and Analysis of Organizations, lead director of Transat A.T., and chancellor emeritus of Université de Montréal. He has been chancellor and chair of the board of Université de Montréal, chair and general manager of Burson-Marsteller Québec, and president of Maxwell Communications Canada and Logistec Corporation. Previously, he was senior vice-president and general manager, Quebec, at Scotiabank for 16 years. He became the founding director of the Institute of Canadian Bankers after being on the faculty of the Université Laval School of Business. He has an MBA from Harvard University and a BA from Université Laval.

Jacynthe Côté

President and CEO, Rio Tinto Alcan

Jacynthe Côté has been president and CEO of Rio Tinto Alcan's Primary Metal business unit since 2007, with responsibility for all primary metal facilities and power generation installations worldwide. Primary Metal has 19,400 employees in 45 facilities around the world. From 2005 to 2007, Ms. Côté served as president and CEO of Alcan's Bauxite and Alumina business unit and senior vice-president of Alcan Inc. In 2000, she was appointed vice-president of business planning and development at Primary Metal and, in 2003, took on the role of vice-president of human resources, environment, health and safety in the same unit. In 1996, she was named plant manager of the Beauharnois, Quebec, smelter and, in 1999, was transferred to the Lynemouth smelter in the United Kingdom as plant manager. Ms. Côté joined Alcan in 1988 as a process analyst at the Vaudreuil Works in Saguenay, Quebec. She holds a bachelor's degree in chemistry from Université Laval.

Colin Dodds

President and Vice-Chancellor, Saint Mary's University

Colin Dodds is president of Saint Mary's University in Halifax and a director on the board of the Association of Universities and Colleges, Canada. He joined the faculty of Saint Mary's Sobey School of Business in September 1982, and became departmental chair (Finance and Management Science) and MBA director in 1984. He was appointed dean of the Sobey School of Business in 1987 and vice-president (academic and research) in 1991. He assumed the presidency in 2000. Dr. Dodds is former chair of the board of the Canadian Bureau for International Education, and is past chair of the Canadian Scholarship Trust. He has been named one of Atlantic Canada's top 50 CEOs and received many other awards. He has published many books, journal articles and conference papers, particularly on financial markets. He continues to teach international finance to graduate students at Saint Mary's University. Educated in the United Kingdom and holding BA, BSc, MA and PhD degrees, Dr. Dodds has taught at many universities in the United Kingdom (Sheffield, Birmingham and Hull), Asia, and Canada (McMaster and Brock).

Lorna Smith

Director, Office of International Education, Mount Royal University

Lorna Smith has been director of the Office of International Education at Mount Royal University since its inception in 1988. A native of Kingston, Jamaica, Ms. Smith has a BA, MA and BEd from Queen's University in Kingston, Ontario, and has completed doctoral studies at the University of Calgary. She has served on the national boards of the Association of Canadian Community Colleges and the Canadian Bureau for International Education. She is currently on the board of the Consortium for North American Higher Education Collaboration. Ms. Smith is the international liaison officer for Mount Royal University at the Association of Universities and Colleges of Canada. She has taught in Canada, the United States, Germany and the former Soviet Union.

Don Wright

President, British Columbia Institute of Technology

Don Wright is president of the British Columbia Institute of Technology. Dr. Wright's career includes experience as a teacher (at several universities), a senior government official and a private-sector executive. He served as deputy minister in the ministries of Finance, Forests, Economic Development and Education in the Saskatchewan and B.C. governments. He was B.C.'s deputy minister of education from 1996 to 1997. Dr. Wright was vice-president of forestry, environment and corporate affairs with Weldwood of Canada from 1997 to 2001. He returned to public life in 2001 and served as the British Columbia deputy minister of forests until 2003. In 2003, he established Analytica Consulting, which provided advice to public- and private-sector clients. Dr. Wright holds a BCom from the University of Saskatchewan, a Master's degree (Economics) from the University of British Columbia and a PhD (Economics) from Harvard University.

ANNEX C: Competitor Metrics and Practices

	Canada	Australia	United Kingdom	United States of America
International student market share (Estimated)	5%	13%	10%	18%
Number of international students	239,131 (2011) ⁸⁰	557,425 (2011) ⁸¹	428,224 (2010/11) ⁸² [higher education only]	723,277 (2010/11) ⁸³
Growth on previous year	9.6% ⁸⁴	-9.6% ⁸⁵	5.5% ⁸⁶	4.7% ⁸⁷
Growth since 2006	40.8%	45.2% ⁸⁸	29.7% ⁸⁹	28% ⁹⁰
Proportion of total enrolment	7.5% ⁹¹ [at the postsecondary level only]	25.1% ⁹² [at the university undergraduate level] 34.9% ⁹³ [at the university graduate study level]	17.1% ⁹⁴ [higher education only]	3.5% ^{95, 96}
Annual entries of international students	98,378 (2011) ⁹⁷	298,842 (2011) ⁹⁸	-	214,490 (2010/11) ⁹⁹
Growth on previous year	3.3% ¹⁰⁰	-8.6% ¹⁰¹	-	5.7% ¹⁰²
Outbound students	17,850 (2006 estimate) ¹⁰³ [full-time university students participating in a form of study abroad for credit]	18,340 (2010) ¹⁰⁴ [university students]	33,000 (2010 estimate) ¹⁰⁵	270,604 (2010/11) ¹⁰⁶ [studied abroad for academic credit]
Economic impact	\$8.0 billion (2010) ¹⁰⁷	\$16.8 billion A\$16.3 billion (2010/11) ¹⁰⁸	\$22.6 billion £14.1 billion (2008/09) ¹⁰⁹	\$20.76 billion US\$20.23 billion (2010/11) ¹¹⁰
Student visa fees	\$125	\$552 A\$535 ¹¹¹	\$460 £289 ¹¹² [for individuals applying outside the UK]	\$164 US\$160 ¹¹³ [For some countries, an additional visa issuance reciprocity fee is charged if the visa is issued]

Cont./

	Canada	Australia	United Kingdom	United States of America
International education marketing	<p>Edu-Canada (DFAIT)</p> <p>Promotes Canada as a study destination or education partner to international audiences.</p> <p>Facilitates relations and services between the Federal government, provinces, NGOs and Canadian missions abroad in education promotion; Coordinates education promotion efforts by Canadian missions abroad.</p>	<p>Australian Trade Commission (Austrade)</p> <p>Responsible for the international marketing and promotion of Australian education and training.¹¹⁴</p> <p>Australian Education International (AEI)</p> <p>(Department of Industry, Innovation, Science, Research and Tertiary Education).</p> <p>Leads strategic policy, regulation and government to government engagement in the international education sector.¹¹⁵</p>	<p>British Council</p> <p>Provides research and intelligence, develops and facilitates international partnerships, and provides a range of marketing services to support universities' in their recruitment activities in 35 key markets.</p> <p>Manages the Education UK brand, the Education UK website, global marketing campaigns and exhibitions around the world.</p> <p>Facilitates the mobility of UK students to study and gain experience in other countries.¹¹⁶</p>	<p>EducationUSA</p> <p>Global network of more than 400 advising centers supported by the Bureau of Educational and Cultural Affairs at the U.S. Department of State.</p> <p>EducationUSA centers actively promote U.S. higher education around the world. EducationUSA centers also support U.S. study abroad by advising U.S. colleges and universities about options for developing study programs in other countries.¹¹⁷</p>
	<p>Funding:</p> <p>\$1 million (/year, 2006/07–2011/12)</p>	<p>Funding:</p> <p>\$26.7 million A\$25.9 million [over three years from 2010/11]¹¹⁸</p>	<p>Funding:</p> <p>unavailable</p>	<p>Funding:</p> <p>unavailable</p>

Note: Figures have been collected for illustrative purposes only. Direct comparisons are not possible in every case, and the listed source should be consulted for further information. Examples used do not constitute an exhaustive list of activities by foreign governments. Currency conversions based on Bank of Canada rates on June 27, 2012.

ANNEX D: Stakeholders in the Canadian Education Community

Association of Atlantic Universities (AAU): The AAU is a voluntary association of the universities and colleges in the Atlantic region and in the West Indies that offers programmes leading to a degree or have degree-granting status. Today, the association represents the collective interests of 18 member institutions.

Association of Canadian Community Colleges (ACCC): The ACCC is the national and international voice through which Canada's colleges and institutes advise and inform various levels of government, government agencies, business, industry and labour. The ACCC brings attention to the role of its member institutions in social, cultural and economic development.

Association québécoise des écoles de français langue étrangère (AQEFLE [Quebec association of French-language schools]): The AQEFLE is made up of universities, colleges and high schools accredited by Quebec's education department to teach French as a second or foreign language. These well-known institutions offer programs based on superior academic standards.

Association of Universities and Colleges, Canada (AUCC): The AUCC is the voice of Canada's universities, representing 95 Canadian public and private not-for-profit universities and university-degree level colleges.

Associations des universités francophones du Canada (AUFC [association of French universities in Canada]): The AUFC's mission is to promote university education in francophone minority communities in Canada through consultation and collaboration among member institutions, as well as to represent them in issues of common interest before Canadian governmental institutions, and national and international organizations.

British Columbia Council for International Education (BCCIE): Established in 1990, the BCCIE is a non-government agency and not-for-profit society, funded through membership fees and fee-for-services activities. The BCCIE has been a leader in the development and promotion of international education in British Columbia.

Canada-U.S. Fulbright Program: The Canada-U.S. Fulbright Program is a bi-national program supported by Foreign Affairs and International Trade Canada, the U.S. Department of State, and a large number of public- and private-sector partners. The Canada-U.S. Fulbright Program operates on the principle of reciprocal exchange and provides the opportunity for outstanding Canadian and American students and scholars to lecture, research and pursue graduate study in the United States and Canada. Award recipients include prominent and promising scholars, experienced and junior professionals and exceptional students.

Canadian Association of Independent Schools (CAIS): CAIS is an association for independent schools that operate within Canada or offer a curriculum leading to a Canadian diploma in a location outside of the country.

Canadian Association of Public Schools - International (CAPS-I): CAPS-I is an association of 89 Canadian public school districts/boards that provide educational programs to international students from around the world.

Canadian Association of University Teachers (CAUT): Founded in 1951, CAUT is the national voice for academic staff. Today, representing 55,000 teachers, librarians, researchers and other academic professionals and general staff, CAUT is an outspoken defender of academic freedom and works actively in the public interest to improve the quality and accessibility of post-secondary education in Canada.

Canadian Bureau for International Education (CBIE): The CBIE is an umbrella non-governmental organization composed of 200 colleges, universities, schools, school boards, educational organizations and businesses across Canada.

Canadian Education and Training Accreditation Commission (CETAC): CETAC was established in 1984 with the goal of creating a set of standards and accreditation framework for the private career colleges.

Canadian Foundation for the Americas (FOCAL): FOCAL is an independent, non-governmental organization dedicated to deepening and strengthening Canada's relations with countries in Latin America and the Caribbean through policy discussion and analysis. FOCAL's mission is to develop a greater understanding of important hemispheric issues and to help build a stronger community of the Americas.

Canadian Information Centre for International Credentials (CICIC): CICIC collects, organizes and distributes information, and acts as a national clearing house and referral service to support the recognition and portability of Canadian and international educational and occupational qualifications.

Canadian Network for Innovation in Education (CNIE): The CNIE is a national association of professionals committed to excellence in the provision of distance education in Canada.

Canadian Society for Training and Development (CSTD): The CSTD is the largest not-for-profit membership association in Canada dedicated to the profession of training and human resources development (with more than 2,000 current members).

Cégep International: Created in 1992, Cégep International is a non-profit organization that brings together 48 Federation of Colleges members, which adhere to Cégep International and benefit mainly from its information and representative services.

Colleges Ontario: Colleges Ontario is the advocacy organization for the province's 24 colleges of applied arts and technology.

Conference of Rectors and Principals of Quebec Universities (CREPUQ): The CREPUQ is a private-sector organization that brings together, on a voluntary basis, all university institutions in Quebec.

Council of International Schools (CIS): The CIS is a not-for-profit organization composed of more than 650 member schools and 450 colleges/universities. The Canadian Higher Education Committee serves the Canadian universities within CIS and facilitates the exchange of information about Canadian higher education.

Council of Ministers of Education, Canada (CMEC): CMEC is the national voice for education in Canada. It is the mechanism through which provincial/territorial ministers consult and act on matters of mutual interest, and the instrument through which they consult and cooperate with national education organizations and the federal government.

Council of Ontario Universities (COU): For more than 30 years, COU has been working to improve the quality and accessibility of higher education in Ontario. COU is involved in a host of activities from issues management to information management, from leadership on collective issues to general operational support for our member institutions, committees and affiliates.

Éducation Internationale: Éducation Internationale is a cooperative for educational development and exchange services created in 2001 by the Fédération des commissions scolaires du Québec [federation of school boards in Quebec].

EduNova: EduNova is a co-operative industry association of education and training providers in Nova Scotia. It is the only provincial education and training co-operative in Canada.

Inter-American Organization for Higher Education (IOHE): Created in 1979 in Quebec City, the IOHE is an international university association that promotes cooperation between member institutions and fosters the development of higher education in the Americas.

International Association of Centers for Federal Studies (IACFS): Founded in 1977, the IACFS is an association of centres and institutes throughout the world with interests in independent research and publication about political, constitutional, legal, administrative, fiscal, economic, historical and philosophical issues relevant to political systems that have federal features.

International Association of Quebec Studies (AIEQ): The AIEQ is dedicated to promoting and developing Quebec studies in Canada and abroad.

International Council for Canadian Studies (ICCS): The ICCS is a federation of 22 national and multinational Canadian studies associations and four associate members in 39 countries. Its mandate is to promote and support research, education and publication in all fields of Canadian studies and in all countries. The ICCS network links over 7,000 academics and researchers.

International Public School Education Association (IPSEA): IPSEA is an association of public schools in British Columbia that welcome international students and offer a guarantee of quality education to students who wish to study in Canada.

Language Industry Association (AILIA): AILIA brings together the different stakeholders in the language business. Its mission is to promote and increase the competitiveness of the Canadian language industry nationally and internationally through advocacy, accreditation and information sharing.

Languages Canada: Languages Canada is Canada's trade association for language training representing both of Canada's official languages: English and French. Members must adhere to the association's quality-assurance standards in the areas of: curriculum, teacher qualifications, student services, student admissions, marketing, promotion, facilities and administration.

Manitoba Council for International Education (MCIE): The MCIE is an organization that is constituted and supported by the 21 institutions (elementary and high schools, colleges and universities in Manitoba) that belong to the organization through membership and volunteer participation.

National Association of Career Colleges (NACC): NACC is an association of private career training institutions from across Canada and companies offering products and services to those institutions.

Polytechnics Canada (PC): Polytechnics Canada is an alliance of nine large, internationally recognized post-secondary institutions committed to producing career-ready graduates who combine critical thinking with theoretical understanding and practical competence.

Réseau des Cégeps et Collèges francophones du Canada (RCCFC [network of francophone Cegeps and colleges in Canada]): Created in 1995, the RCCFC's mission is to establish a partnership between francophone Canadian colleges. It constitutes a network for mutual help, promotion and exchanges tied to the development of French college education in Canada, while promoting the use of information and communications technologies.

Shastri Indo-Canadian Institute (SICI): The SICI is an educational enterprise that promotes mutual awareness and understanding between India and Canada, mainly through facilitating academic activities. The institute funds research, links institutions in the two countries, and organizes seminars and conferences.

World University Service of Canada (WUSC): For more than three decades, WUSC has supported development in over 50 countries throughout the world. WUSC links governments, non-governmental organizations and institutions, and community-based organizations with Canadian expertise, services and resources to strengthen capacity and develop local potential.

ANNEX E: Conceptualizing a Digital Strategy

In launching a sophisticated digital strategy, several elements should be considered to ensure appropriate tools and content are delivered for each of the key audiences outlined in Chapter 7. While many competitor countries are revising and updating digital strategies, those that are most successful clearly offer an authoritative source for international students. Noteworthy competitor sites to monitor include:

United Kingdom



Australia



New Zealand



France



Many other country sites, consultants and agencies are generating substantial interest through competitive social media and Internet strategies. Often raised throughout the engagement process, the panel noted discussion regarding the critical development of social media in developing a sophisticated and nimble digital strategy. Social media monitoring companies report statistics on a daily basis, given the extensive growth of these communication channels. Out of the 6 billion people on the planet, 4.8 billion have a mobile phone, with many of them leaping through technological revolutions to the most current and efficient tools available. We also know that companies report their own user profiles.

- Facebook hosts 850 million active users:
 - 425 million use mobile technology
 - An average Facebook user has 130 friends and “likes” 80 pages
 - 56 percent of consumers are more likely to refer a brand after becoming a fan
 - More than 3.5 billion pieces of content are shared each week

- Twitter adds 1 million accounts each day and hosts 465 million users:
 - 55 percent use mobile technology
 - 34 percent of marketers have generated leads using Twitter

- LinkedIn has become a professional networking giant:
 - Two new members join each second
 - 64 million members in North America
 - Europe hosts 34 million regional members

- YouTube generates 2 billion views per day:
 - 44 percent of users are between 12 and 34 years old

- India’s Orkut is the most visited social media site:
 - More than 12.8 million visitors, an increase of 81 percent from last year and three times the size of its nearest competitor in the category
 - Facebook ranks second with 4 million visitors, an increase of 150 percent over last year

- China’s restrictions on social media have enabled local social media networks that compete heavily:
 - Renren hosts 160 million users
 - Pengyou models Facebook in style
 - Weibo (launched in 2009) currently has more than 100 million users and is growing by 10 million new users per month

Social media is the new media platform for planned media relations and viral communications. In modeling how a digital strategy might work, the following concept can illustrate how effectively digital platforms can operate through a coordinated strategy with many spokes to push key messages. This is a concept initiated by DFAIT but represents an example of how authoritative sources interact with other partner websites and with content generated on social media.

Endnotes

1. Government of Canada, *Mobilizing Science and Technology to Canada's Advantage: Progress Report*, 2009, p. 26
2. Science, Technology and Innovation Council, *State of the Nation 2010*, 2011, p. 66
3. Ibid, p. 62
4. Ibid, p. 59
5. Ibid, p. 67
6. Independent Panel on Federal Support to Research and Development, *Innovation Canada: A Call to Action*, 2011, p. 2–15
7. V. Wadhwa et al., *America's New Immigrant Entrepreneurs, Part 1*, 2007, p. 35
8. Ibid, p. 35
9. V. Wadhwa et al., *Education, Entrepreneurship and Immigration: America's New Immigrant Entrepreneurs, Part II*, 2007, p. 8
10. Association of Universities and Colleges of Canada, *AUCC report on the educational programs and services offered by Canadian higher education institutions abroad to students residing outside of Canada*, 2009
11. Association of Canadian Community Colleges, *Internationalizing Canadian Colleges and Institutes: The First National Report on International Education and Mobility*, 2010
12. Canadian Chamber of Commerce, *Downturn, Recovery and the Future Evolution of the Labour Market*, 2010, p. 12
13. Citizenship and Immigration Canada, *Annual Report to Parliament on Immigration*, 2011, p. 16
14. The Gandalf Group, *The 26th Quarterly C-Suite Survey: Federal Budget, Spending Cuts, Pensions, and the Labour Market*, 2012
15. Human Resources and Skills Development Canada, *Looking Ahead: A 10-Year Outlook for the Canadian Labour Market (2008–2017)*, 2008
16. UNESCO Institute for Statistics, *Global Education Digest 2009: Comparing Education Statistics Across the World*, 2009, p. 45
17. B.C. International Education Strategy: www.bcjobsplan.ca/ourprogress/international-education
18. Government of Saskatchewan, "Province increases opportunities for international education," April 29, 2010
19. The University of British Columbia, "UBC scholarships for international students"
20. University of Waterloo, "About UW UAE"
21. Centennial College, "About the International Centre"
22. OECD, *Education at a Glance 2011*, 2011, p. 318
23. OECD, *Higher Education to 2030. Volume 2*, 2010, p. 81
24. OECD, *Education at a Glance 2011*, 2011, p. 321
25. Ibid, p. 322
26. Institute of International Education, "Open Doors 2011 Fast Facts," 2011
27. EducationUSA, "About Us"

28. U.S. Department of Homeland Security, "Secretary Napolitano Announces Launch of Study in the States," 2011
29. U.S. Department of Homeland Security, "DHS Reforms to Attract and Retain Highly Skilled Immigrants," 2012
30. U.S. Department of Homeland Security, Secretary Napolitano Announces Academic Advisory Council," 2012
31. U.S. Department of State, "Fulbright International Educational Exchange Program: Funding and Administration"
32. U.S. Department of State, "The Fulbright Program"
33. DTZ, *Prime Minister's Initiative for International Education Phase 2 (PMI2) Final Evaluation Report*, 2011
34. Higher Education Statistics Agency, "Non-UK domicile students," 2012
35. U.K. Border Agency, "Government outlines overhaul of student visas," 2011
36. U.K. Border Agency, "New rules to welcome the best and brightest while tackling abuse," 2012
37. Austrade, "International Student Data for 2006"
38. Austrade, "International Student Data for 2009"
39. International Education Advisory Council, *Discussion Paper for the Development of an International Education Strategy for Australia*, 2012
40. Australian Education International, "New Council to advise on future of international education," 2011
41. Austrade, "Australian Government Agency Responsibilities For International Education, 1 July 2010"
42. International Education Advisory Council, *Discussion Paper for the Development of an International Education Strategy for Australia*, 2012
43. Australia, Department of Foreign Affairs and Trade, *Portfolio Budget Statements 2012–13—Foreign Affairs and Trade Portfolio*, 2012, p. 67
44. Australia, *Australia Awards 2010 Update*, 2010, p. 12
45. Germany, Federal Ministry of Education and Research, *Internationalization of Higher Education—Foreign Students in Germany—German Students Abroad*, 2010
46. Illuminate Consulting Group, *Best Practices on Managing the Delivery of Canadian Education Marketing*, 2009, p. 57
47. Ibid, p. 13
48. Deutscher Akademischer Austausch Dienst (DAAD), *2010 Annual Report*, 2010, p. 16
49. Institute of International Education, *International Education: A Global Economic Engine*, 2012, p. 63
50. Ibid, p. 13
51. Ibid, p. 15
52. CampusFrance, *Les étudiants internationaux : Chiffres clés CampusFrance 2011 (International students: key figures, CampusFrance 2011)*, 2011
53. CampusFrance, "Campus France offices around the world"
54. France, Ministère des Affaires Étrangères et Européennes, *Receiving Foreign Students in France*, 2010, p. 3
55. Ibid, p. 5
56. CampusFrance, *Les étudiants internationaux: Chiffres clés CampusFrance 2011*, 2011
57. CampusFrance, *Choose France*, 2012, p. 5
58. Institute of International Education, *International Education: A Global Economic Engine*, 2012, p. 60
59. Ibid, p. 61
60. New Zealand, *Leadership Statement for International Education*, 2011, p. 7
61. Ibid, p. 13
62. International Education Advisory Council, *Discussion Paper for the Development of an International Education Strategy for Australia*, 2012, p. 8

63. Malaysia, Performance Management and Delivery Unit (Pemandu), *Economic Transformation Programme Annual Report 2011*, 2011
64. Ibid, p. 175
65. Ibid
66. Illuminate Consulting Group, *Canada's Capacity for International Student Enrollment*, 2011, p. 15
67. Ibid, p. 29
68. Ibid, p. 8
69. Ibid, p. 35
70. Association of Universities and Colleges of Canada, *Internationalizing Canadian campuses: Main themes emerging from the 2007 Scotiabank-AUCC workshop on excellence in internationalization at Canadian universities*, 2007, p. 1
71. Association of Universities and Colleges of Canada, *Cardinal Points: How North-South Partnerships Support Internationalization Strategies*, 2010
72. Sheila Embleton et al., *Canada's International Education Strategy: Focus on Scholarships*, 2011, p. 6
73. Canada Research Chairs, "Program Statistics," 2012
74. U.S. Department of State, "The Fulbright Program"
75. Foreign and Commonwealth Office, "Chevening: facts and figures," 2012
76. U.K.-India Education and Research Initiative, "Programme Background"
77. U.K.-India Education and Research Initiative, "UKIERI Brochure"
78. Ibid
79. OECD, *Education at a Glance 2011*, 2011, p. 322
80. Citizenship and Immigration Canada, "Facts and Figures 2011: Preliminary tables—Foreign students present on December 1st by province or territory and urban area, 2007–2011", 2012
81. Austrade, "International Student Data for 2011", 2011
82. Higher Education Statistics Agency, "Non-UK domicile students", 2012
83. Institute of International Education, "Open Doors Fast Facts 2011", 2011
84. Based on CIC figure for international students in 2010 of 218,112
85. Austrade, "International Student Data for 2011", 2011
86. Higher Education Statistics Agency, "Non-UK domicile students", 2012
87. Institute of International Education, "Open Doors Fast Facts 2011", 2011
88. Based on Australian Education International figure for international students in 2006 of 383,818
89. Based on HESA figure for non-UK domicile higher education students in 2005/06 of 330,080
90. Based on IIE figure for international students in 2005/06 of 564,766
91. Illuminate Consulting Group, *Canada's Capacity for International Student Enrollment*, 2011, p. 15
92. Ibid, p. 106.
93. Ibid, p. 106
94. Higher Education Statistics Agency, "Non-UK domicile students", 2011
95. Institute of International Education, "Open Doors Fast Facts 2011", 2011
96. See also *Canada's Capacity for International Student Enrollment*, p. 113
97. Citizenship and Immigration Canada, "Facts and Figures 2010: Preliminary tables - Total entries of foreign students by province or territory and urban area, 2007–2011", 2012

98. Austrade, "International Student Data for 2011", 2011
99. Institute of International Education, "Open Doors Fast Facts 2011", 2011
100. Based on CIC figure for entries in 2010 of 95,236
101. Austrade, "International Student Data for 2011", 2011
102. Institute of International Education, "Open Doors Fast Facts 2011", 2011
103. Association of Universities and Colleges of Canada, *Canadian universities and international student mobility*, 2007
104. Australian Universities International Directors' Forum, "2011 Research Agenda", 2011
105. Higher Education Funding Council for England, *International student mobility literature review: Final report*, 2010
106. Institute of International Education, "Open Doors Fast Facts 2011", 2011
107. Roslyn Kunin & Associates, Inc., *Economic Impact of International Education in Canada—An Update*, 2011
108. Australian Education International, "Export Income to Australia from Education Services in 2010–11", 2011
109. London Economics, *Estimating the Value to the UK of Education Exports*, 2011
110. NAFSA, "The Economic Benefits of International Education to the United States for the 2010–2011 Academic Year: A Statistical Analysis"
111. Australian Department of Citizenship and Immigration, "Student Visa Charges"
112. UK Border Agency, "Application fees"
113. US Department of State, "Student Visas"
114. Austrade, "Australian Government Agency Responsibilities for International Education, 1 July 2010", 2010
115. Ibid
116. Institute of International Education, *International Education: A Global Economic Engine*, 2012
117. U.S. Department of State, "EducationUSA"
118. Australia, Department of Foreign Affairs and Trade, Portfolio Additional Estimates Statements 2009–10—Foreign Affairs and Trade Portfolio, 2009, p. 53

References

Association of Canadian Community Colleges. *Internationalizing Canadian Colleges and Institutes: The First National Report on International Education and Mobility*. Ottawa: ACCC, 2010.

Association of Universities and Colleges of Canada. *Canadian universities and international student mobility*. Ottawa: AUCC, 2007.

———. *Internationalizing Canadian campuses: Main themes emerging from the 2007 Scotiabank-AUCC workshop on excellence in internationalization at Canadian universities*. Ottawa: AUCC, 2007.

———. *AUCC report on the educational programs and services offered by Canadian higher education institutions abroad to students residing outside of Canada*. Ottawa: AUCC, 2009.

———. *Cardinal Points: how North-south partnerships support internationalization strategies*. Ottawa: AUCC, 2010.

Australia. *Australia Awards 2010 Update*. Retrieved from www.australiaawards.gov.au/docs/Australia-Awards-2010-Update.pdf

Australia. Austrade. 2006. “International Student Data for 2006.” Retrieved from www.austrade.gov.au/Export/Export-Markets/Industries/Education/International-Student-Data/2006-Yearly/default.aspx

———. 2009. “International Student Data for 2009.” Retrieved from www.austrade.gov.au/Export/Export-Markets/Industries/Education/International-Student-Data/2009-Yearly/default.aspx

———. 2010. “Australian Government Agency Responsibilities for International Education, 1 July 2010.” Retrieved from www.austrade.gov.au/Export/Export-Markets/Industries/Education/Roles-and-responsibilities/default.aspx

———. 2011. “International Student Data for 2011.” Retrieved from www.austrade.gov.au/Export/Export-Markets/Industries/Education/International-Student-Data/2011-Yearly

Australia. Department of Citizenship and Immigration. “Student Visa Charges.” Retrieved from www.immi.gov.au/allforms/990i/students-visa-charges.htm

Australia. Department of Foreign Affairs and Trade. *Portfolio Additional Estimates Statements 2009–10—Foreign Affairs and Trade Portfolio*. Canberra: Australian Government.

———. 2012. *Portfolio Budget Statements 2012–13—Foreign Affairs and Trade Portfolio*. Canberra: Australian Government.

Australian Education International. 2011. “Export Income to Australia from Education Services in 2010–11.” Retrieved from www.aei.gov.au/research/Research-Snapshots/Documents/Export%20Income%202010-11.pdf

———. 2011. “New Council to advise on future of international education.” Press release, October 14, 2011. Retrieved from www.aei.gov.au/News/Latest-News/Documents/Media%20Release%20-%20New%20Council%20to%20advise%20on%20future%20of%20international%20education.pdf

Australian Universities International Directors’ Forum. 2011. “2011 Research Agenda.” Retrieved from www.aiec.idp.com/PDF/2011_Olsen_Thu_1210_HC_Paper.pdf

CampusFrance. 2011. *Les étudiants internationaux: Chiffres clés CampusFrance 2011 (International students: key figures, CampusFrance 2011)*. Retrieved from ressources.campusfrance.org/publi_institu/etude_prospect/chiffres_cles/fr/brochure_campusfrance_chiffres_cles_n6_2011.pdf

———. 2012. *Choose France*. Retrieved from ressources.campusfrance.org/guides_etab/guides/choisir/en/choisir_en.pdf

- . “Campus France offices around the world.” Retrieved from www.campusfrance.org/en/page/campus-france-offices-around-world
- Canada Research Chairs. 2012. “Program Statistics.” Retrieved from www.chairs-chaire.gc.ca/about_us-a_notre_sujet/statistics-statistiques-eng.aspx
- Canada. Science, Technology and Innovation Council (STIC). 2011. *State of the Nation 2010–Canada’s Science, Technology and Innovation System: Imagination to Innovation–Building Canadian Paths to Prosperity*. Ottawa: STIC.
- Canadian Chamber of Commerce. 2010. *Downturn, Recovery and the Future Evolution of the Labour Market*. Ottawa: Canadian Chamber of Commerce.
- Centennial College. “About the International Centre.” Retrieved from www.centennialcollege.ca/international/aboutus
- Citizenship and Immigration Canada. 2011. *Annual Report to Parliament on Immigration*. Ottawa: Citizenship and Immigration Canada.
- . “Facts and Figures 2011: Preliminary tables – Foreign students present on December 1st by provinces or territory and urban area, 2007–2011.” Retrieved from www.cic.gc.ca/english/resources/statistics/facts2011-preliminary/06.asp
- . “Facts and Figures 2011: Preliminary tables – Total entries of foreign students by province or territory and urban area, 2007–2011.” Retrieved from www.cic.gc.ca/english/resources/statistics/facts2011-preliminary/05.asp
- Competition Policy Review Panel. 2008. *Compete to Win: Final Report–June 2008*. Ottawa: Public Works and Government Services Canada (PWGSC).
- DTZ. 2011. *Prime Minister’s Initiative for International Education Phase 2 (PMI2) Final Evaluation Report*. London: DTZ.
- EducationUSA. “About Us.” Retrieved from www.educationusa.info/about.php#.T7KCPk6Z3To
- Embleton, Sheila, et al. 2011. *Canada’s International Education Strategy: Focus on Scholarships*. Ottawa: Canadian Bureau for International Education.
- Expert Panel on Commercialization. 2006. *People and Excellence: The Heart of Successful Commercialization. Volume I: Final Report of the Expert Panel on Commercialization*. Ottawa: PWGSC.
- France. Ministère des Affaires Étrangères et Européennes. 2010. *Receiving Foreign Students in France*. Retrieved from www.diplomatie.gouv.fr/fr/IMG/pdf/MAE_mobilite_etudiante_v_anglaise_web.pdf
- The Gandalf Group. 2012. *The 26th Quarterly C-Suite Survey: Federal Budget, Spending Cuts, Pensions, and the Labour Market*. Toronto: *The Globe and Mail*.
- Germany. Deutscher Akademischer Austausch Dienst (DAAD). 2010. *2010 Annual Report*. Bonn: DAAD.
- Germany. Federal Ministry of Education and Research. 2011. *Internationalization of Higher Education–Foreign Students in Germany–German Students Abroad*. Berlin: Federal Ministry of Education and Research.
- Higher Education Funding Council for England. 2010. *International student mobility literature review: Final report*. HEFCE.
- Higher Education Statistics Agency. 2012. “Non-UK domicile students.” Press release, February 23, 2012. Retrieved from www.hesa.ac.uk/index.php?option=com_content&task=view&id=2371&Itemid=161
- Human Resources and Skills Development Canada. 2008. *Looking Ahead: A 10-Year Outlook for the Canadian Labour Market (2008–2017)*. Gatineau: HRSDC.
- Illuminate Consulting Group. 2009. *Best Practices on Managing the Delivery of Canadian Education Marketing*. Ottawa: DFAIT.
- . 2011. *Canada’s Capacity for International Student Enrollment*. Ottawa: DFAIT, www.international.gc.ca/education/capacity-report-rapport_sur_les_capacites.aspx?view=d
- Independent Panel on Federal Support to Research and Development. 2011. *Innovation Canada: A Call to Action. Review of Federal Support to Research and Development–Expert Panel Report*. Ottawa: PWGSC.

- Institute of International Education (IIE). 2011. "Open Doors Fast Facts 2011." Fact Sheet. Retrieved from www.iie.org/Research-and-Publications/Open-Doors/Data/-/media/Files/Corporate/Open-Doors/Fast-Facts/Fast%20Facts%202011.ashx
- Institute of International Education. 2012. *International Education: A Global Economic Engine*. Washington: IIE.
- International Education Advisory Council. 2012. *Discussion Paper for the Development of an International Education Strategy for Australia*. Retrieved from [aei.gov.au/IEAC2/Consultation\(IEAC\)/Documents/InternationalEducationAdvisoryCouncilDiscussionPaper.pdf](http://aei.gov.au/IEAC2/Consultation(IEAC)/Documents/InternationalEducationAdvisoryCouncilDiscussionPaper.pdf)
- London Economics. 2011. *Estimating the Value to the UK of Education Exports*. London: Department for Business, Innovation & Skills.
- Malaysia. Performance Management and Delivery Unit. 2011. *Economic Transformation Programme: Annual Report 2011*.
- NAFSA: Association of International Educators. 2011. "The Economic Benefits of International Education to the United States for the 2010–2011 Academic Year: A Statistical Analysis." Retrieved from www.nafsa.org/_/File/_/eis2011/USA.pdf
- New Zealand Ministry of Education. 2011. *Leadership Statement for International Education: Version One*.
- Organisation for Economic Co-operation and Development. 2009. *Higher Education to 2030 Volume 2: Globalisation*. OECD Publishing.
- . 2011. *Education at a Glance 2011: OECD Indicators*. OECD Publishing.
- Provincial and Territorial Ministers of Education and Immigration. 2011. *Bringing Education in Canada to the World, Bringing the World to Canada: An International Education Marketing Action Plan for Provinces and Territories*. Ottawa: The Council of the Federation.
- Public Works and Government Services Canada. 2009. *Mobilizing Science and Technology to Canada's Advantage: Progress Report*. Ottawa: PWGSC.
- Roslyn Kunin & Associates, Inc. *Economic impact of international education in Canada—an update*, www.international.gc.ca/education/report-rapport/economic-impact-economique/index.aspx?lang=eng&view=d
- UNESCO. 2009. *Global Education Digest 2009: Comparing Education Statistics Across the World*. Montréal: UNESCO Institute for Statistics.
- University of British Columbia. "UBC scholarships for international students." Retrieved from you.ubc.ca/ubc/vancouver/intlscholarships.ezc
- University of Waterloo. "About UW UAE." Retrieved from www.uae.uwaterloo.ca/about/index.html
- U.K. Border Agency. 2011. "Government outlines overhaul of student visas." Press Release, March 22, 2011. Retrieved from www.ukba.homeoffice.gov.uk/sitecontent/newsarticles/2011/march/54-student-visas
- . 2012. "New rules to welcome the best and brightest while tackling abuse." Press release, February 13, 2012. Retrieved from www.ukba.homeoffice.gov.uk/sitecontent/newsarticles/2012/february/27-new-student-rules
- . "Application fees." Retrieved from www.ukba.homeoffice.gov.uk/visas-immigration/studying/adult-students/visa-fees/#
- U.K. Foreign and Commonwealth Office. 2011. "Chevening: facts and figures." Retrieved from www.fco.gov.uk/en/about-us/what-we-do/scholarships/chevening/facts-figures/
- U.K.-India Education and Research Initiative. "Programme Background." Retrieved from www.ukieri.org/program-background.html
- . "UKIERI Brochure." Retrieved from www.ukieri.org/images/pdf/UKIERI_Brochure.pdf
- U.S. Department of Homeland Security. 2011. "Secretary Napolitano Announces Launch of Study in the States." Press release, September 16, 2011. Retrieved from www.dhs.gov/ynews/releases/20110916-study-in-the-states.shtm
- . 2012. "DHS Reforms to Attract and Retain Highly Skilled Immigrants." Press release, January 31, 2012. Retrieved from www.dhs.gov/ynews/fact-sheets/20120131-dhs-retain-highly-skilled-immigrants.shtm

———. 2012. "Secretary Napolitano Announces Academic Advisory Council." Press release, March 1, 2012. Retrieved from www.dhs.gov/ynews/releases/20120301-napolitano-announces-academic-advisory-council.shtm

U.S. Department of State. "Fulbright International Educational Exchange Program: Funding and Administration." Retrieved from fulbright.state.gov/funding.html

———. "The Fulbright Program." Retrieved from fulbright.state.gov/about.html

———. "Student Visas." Retrieved from travel.state.gov/visa/temp/types/types_1268.html#1

Wadhwa, Vivek, et al. 2007. *America's New Immigrant Entrepreneurs: Part I*. Durham: Duke University.

———. 2007. *Education, Entrepreneurship and Immigration: America's New Immigrant Entrepreneurs, Part II*. Durham: Duke University.