



High value education opportunities 2015/16 priorities

March 2015









"On behalf of the Oxford Partnership, thank you for all the support and guidance you gave us in preparing to sign the contract with the Colleges of Excellence in Saudi Arabia. Our consortium team members who have worked closely with you and your colleagues are really grateful for all this support. We look forward to working with you again in the future."

Activate Learning (partner in the Oxford Partnership)

"UKTI Education has proved an extremely valuable asset, from organising trade missions and providing intelligence on potential opportunities for new business, to feeding in fresh perspectives on Government policy here in the UK that might affect our ability to do business abroad. Its recent strengthening has led us to require our regional teams to reach out to in-country UKTI staff to develop relationships. As an organisation we are 150 years old and operate in 170 countries; as developers and supplier of qualifications we operate in a highly competitive global landscape. The support of UKTI Education provides an invaluable edge."

Cambridge Assessment

"Pearson's aim is to provide education tools and services that help people everywhere in the world make progress in their lives through learning. As a global business headquartered in London but working in more than 80 countries, UKTI's advice and insights on market trends and opportunitions has been very valuable to us.

UKTI Education's expert advice and shall has helped us both with strategic and to title as well as with the day-to-day market in this has are so important both to Pears and to olleagues and partners across the education sector. The team is business-focuse and a sector willing to engage."

"Our group is actively engaged in the process of entering overseas markets, and your event was very useful in moving our discussions forward. We were able to gain both a more detailed overview of the process, as well as have a discussion on specific issues relating to our progress. The chance to meet with key stakeholders from those countries was also very useful and has facilitated an on-going discussion related to our entry into this market."

ACS International Schools

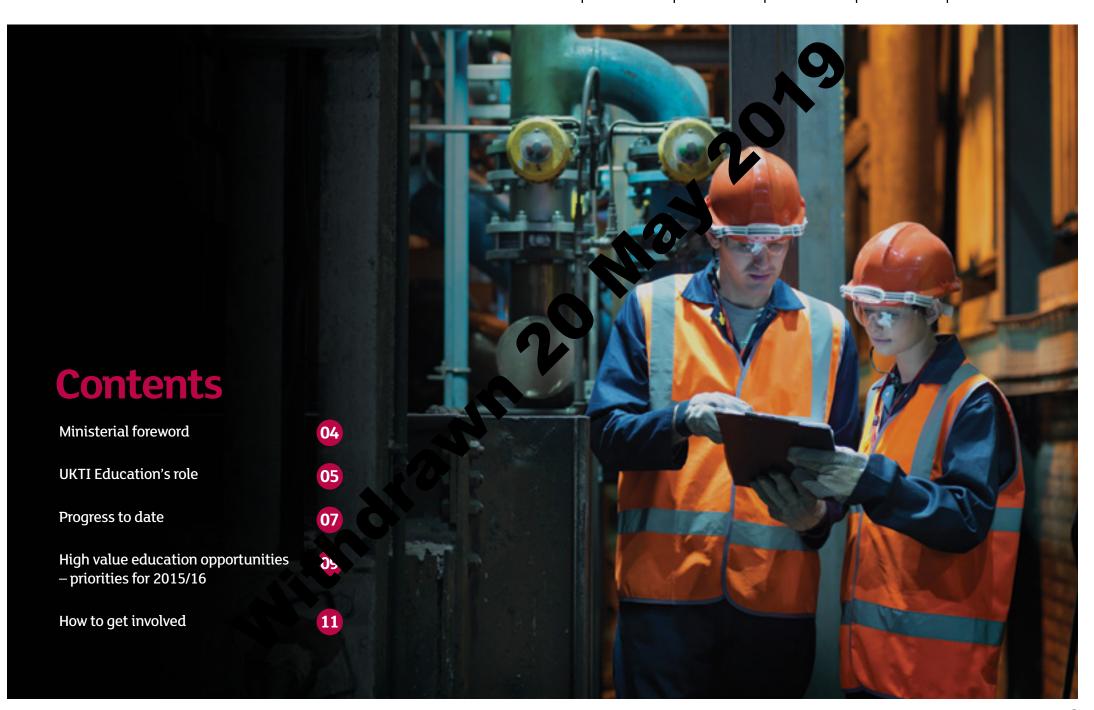
hard work on the Memorandum of Understanding between Peru and the United Kingdom, which will enhance the relations between our two countries in the field of education and English language learning, to great benefit of both."

"Thanks to your help implementing our English language summer schools, they have started with great expectations from our teachers and the education community in general, and we look forward to similar collaboration in the future."

Peruvian Ministry of Education

"We have a really productive working relationship with the UKTI Education team and have been impressed with the focus and determination with which they pursue their goal of increasing education exports. We've worked together on ministerial delegations to emerging markets, promoting new opportunities to our sector from Peru to Kazakhstan, English language, oil and gas, and co-ordinating a UK response to those opportunities. It's a good example of how, by co-ordinating the parts of the system – government, representative bodies and universities – we can increase the reach of UK HE, which is a massive national asset."

Higher Education International Unit



Foreword

Education is global. It is an important enabler of UK economic growth and one of our most successful exports. In recognition of this, the government published its International Education Strategy in July 2013 setting out the case and strategy for a step-change in the way government supports the education sector to grow internationally.

As co-chair of the International Education Council which oversees the implementation of the Strategy, I have witnessed the significant progress we have made since the Strategy was published. Strengthening our overseas marketing to attract record numbers of international students to the UK, and launching the Newton Fund to promote joint scientific capacity building with emerging economies, are two excellent examples.

UKTI Education, established as part of the International Education Strategy, is delivering further achievements. It was set up to help UK education and training organisations access large-scale commercial education opportunities overseas and champion a new, collaborative way of working across the UK education sector to bolster our success internationally. The team is currently working with governments from Peru, to the Gulf, to Kazakhstan on a range of innovative projects. These include supporting Peru to become bilingual in English by 2021 and helping the United Arab Emirates to open more than 40 schools over the next five years. The are also successfully working with different parts of government, the British Ca and trade associations to join up our efforts to support UK education provided to take their products and services overseas.

This document sets out UKTI Education's key projects for the nextwo years – a time which will be crucial for the UK education set. As countries with fast-growing economies invest in their description systems and look to the UK for expertise and support the K war need to ensure it is able to respond to these large so the education and training opportunities. UKTI Education is strong placed to support a sector which is outward-looking and the engage. I am certain that the team's success will so the engage of the engage.

The Rt Hon Greg Clark MP
Minister of State for Universities, Science and Cities

"UKTI
Education is
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As Minister of State for ade and Investment, I have seen growing demand for UK production as a races across a range of sectors and UK education and training and exception. The increasing demand for high quality education around the world means that the international education market, already the second largest sector globally, is growing rapidly.

United the Line ion has successfully supported the UK education and training the consensition of the sector to secure billion of new business overseas since 2013. This puts us on track to chieving the ambition to help UK education providers secure £3 billion of new business overseas by 2020.

The government's drive to double the UK's exports to £1 trillion by 2020 will rely on a more ambitious, focused and collaborative approach from government and our partners in business and industry. UKTI Education exemplifies this approach in the education and training sector, working to identify high value education opportunities overseas and help UK organisations to access them. The team also provides strategic, sector-led input into the broad range of other services available to education and training organisations through UK Export Finance and UKTI's network around the UK and in over 100 markets internationally.

The UK's education system has a strong reputation across the world and many of our education and training organisations, both public and private, have a long history of working internationally. The UK government will continue to support our education and training organisations' overseas growth by providing advice and support to all, whether they are small, medium-sized or large companies.

Lord Livingston of Parkhead Minister of State for Trade and Investment

UKTI Education's role

UKTI Education was set up by the Department for Business, Innovation & Skills (BIS) and UK Trade & Investment (UKTI) with a clear remit.

The team's primary role is to deliver high value education opportunities.

High value education opportunities exist in markets where overseas governments, states and businesses wish to engage UK partners in large-scale commercial education projects, often to deliver significant and systemic change in their education and training systems.

The International Education Strategy identified this growing area of opportunity for the UK education sector and the need for dedicated government support to help the sector access such projects, leading to the creation of UKTI Education.

UKTI Education's role, working with UKTI teams in embassies and high commissions overseas, is to identify these large-scale education projects, undertake due diligence and develop the opportunities.

The team then supports UK organisations to access team, mobilising an effective, co-ordinated UK response of the Education engages with the overseas governments apartners commissioning the projects to the end and support their ambitions and help them access the extensive range of UK education expertise and able. This includes expertise in education provision, inductional technology and resources, qualifications, as the matter particles and financing for educational projects.

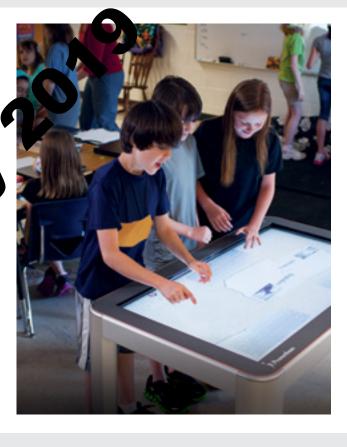
This approach represents a long-term government commitment to sopposing the sector and working with overseas part as a help them access UK expertise to develop the sector systems.

The team's two additional and complementary roles are to:

• Provide strategic, sector-focused input to support the delivery of other services offered by UKTI to organisations in the UK education and training sector. UKTI Education provides strategic guidance and sector input into the other expert expired available to support UK education provides at king to work internationally. These services are funded by UKTI's network of staff in the UK and mean an 100 markets internationally. They include advice and support, information and opportunities, facilitating in-market introductions and

by ness support such as trade finance from UK Export had be, with further support for first-time exporters by the sching soon.

UKTI Education's role is to help tailor these services to meet the needs of UK education and training organisations. We also work to increase strategic alignment across all of UKTI's support for the education and training sector. For example, we look for occasions where UKTI services such as the events and missions programme can help introduce UK education providers to markets that also contain high value education opportunities.



• Work with other government departments to coordinate support for UK education organisations working internationally. A number of other government departments and bodies play key roles in international education including BIS, Foreign & Commonwealth Office (FCO), Department for International Development (DfID), Department for Education (DfE), Home Office, the GREAT campaign and the British Council. UKTI Education works with these partners to promote a joined-up government approach to international education, including effective co-ordination to identify and access opportunities and to recommend solutions to barriers encountered by UK education and training providers working internationally.

Services offered by the UK government to help K education and training organisations do business overseas

and initiatives Specific services

Delivery

ADVICE AND SUPPPORT

- Passport to Export
- International Trade Advisers (ITAs)
- e-Exporting programme
- Export Communication Review
- Open to Export

INFORMATION AND **OPPORTUNITIES**

- Gateway to Global Growth
- Business Opportunities alert service
- Export Marketing Research scheme
- Webinars
- Overseas Market Introduction Service

FACILITATING IN-MARKET INTRODUCTIONS

- Market visit support
- Tradeshow Access Programme (TAP)
- Events & Miss



HIGH VALUE **EDUCATION** OPPORTL IITIES

- lc' n'n ng .id Jucation HVOs. including through gov't-to-gov't engagement
- Tailored support for UK organisations to access these large-scale projects

BUSINESS SUPPORT

- Trade finance and credit insurance from **UK Export Finance** (UKEF)
- Links to venture capital
- Overseas Business Network initiative

Led by:

UKTI teams in London, the regions and overseas

UKTI Education's role:

Strategic overview; selected sector input

Led by:

UKTI teams in London the regions and overseas

teams in London. e regions and overseas, with FCO and British Council Support

UKTI Education's role:

Strategic overview; selected sector input

Led by:

UKTI Education working with teams overseas, in the regions and across government

Led by:

UKEF, UKTI teams in London, the regions and overseas, with FCO support

UKTI Education's role:

Strategic overview; facilitating UKEF support for education HVOs

his UKTI Education role in providing strategic alignment and coherence ross all services offered to the UK education and training sector

Figure 1: A summary of the services offered by the UK government to help education and training organisations to work internationally, including UKTI Education's specific role and responsibilities.

Progress in developing high value education opportunities

Since its launch as part of the government's International Education Strategy, UKTI Education has made substantial progress in identifying, developing and beginning to deliver a programme of high value education opportunities, working with UKTI teams in a number of markets.

As a result, the team has already helped organisations in the UK education and training sector secure $\mathfrak{L}1.5$ billion of new business overseas, exceeding its 2015 ambition to help the education and training sector secure $\mathfrak{L}1$ billion of new business by 2015. Highlights to date are set out below and over page.



Case study: Saudi College of Excellence

Saudi Arabia is implement. At ansformational programme in its technical and vocational educ are and training (TVET) system. Run by the Saudi Technical and Vocational Laining Corporation, this ambitious plan aims to open at least 10 new TVET colleges across Saudi Arabia (50 for men, 50 for war 11). Consider the disconsistency seeking to secure contracts under the programme, including:

- Paising awareness within the UK sector and providing advice on the portunity through a series of expert briefing events
- porting UK bidders to navigate the tendering process, both in the Sk and Saudi Arabia
- Facilitating new consortia
- Providing regular process updates and market intelligence
- Engaging explicit Ministerial and UKEF support for UK bids

Working with colleagues in UKTI Saudi Arabia, UKTI Education has helped two UK bidders/consortia to bid for Wave 1 of the programme, 10 for Wave 2 and four for Wave 3. Support for Wave 2 culminated in a trip to Riyadh by Matthew Hancock, then UK Minister of State for Skills and Enterprise, and UKTI Education's Managing Director to underscore government support for UK bidders.

To date, UK providers have won contracts worth £1.4 billion under the programme, operating 16 of the 37 new colleges let to date and supporting capacity building in a number of existing colleges.

Wave 4 of the programme is expected to start in March/April 2015.

Key highlights

Priority markets identified: 15 markets judged most likely to yield large-scale education opportunities in the near term identified as first for detailed scoping by the team – Brazil, Branch China, Colombia, East Africa, the Gulf, India, Indonesia, Kazakhstan, Malaysia, Mexico, Russia, Saudi Arabia, Turkey and Vietnam

Stateholder engagement activities initiated: regular eetings with key sector representatives and organisations, meetings of the team's Working Groups for English language training (ELT) and oil and gas education and training, and detailed discussions about UK education providers' engagement in priority markets – on-going sector input that is hugely valued by the team

Marketing the UK's capability: working with the sector, the team created a family of prospectuses with case studies illustrating UK education providers' experience of delivering internationally. A general overview of UK capability, English language training and oil and gas education and training published to date. New additions expected in 2015 covering educational technology, teacher training and Special Educational Needs. The launch of the UKTI Education website on gov.uk raises the team's digital profile (see page 12)



Key highlights

- Support for Saudi Colleges of Excellence programme: team launched an intensive programme of support for TVET providers interested in Waves 1, 2 and 3 of this ambitious college programme (see case study on page 6)
- Cross-Whitehall collaboration: new, regular meetings of senior officials working in international education across a number of government departments to join up government support (see page 13 for more details)
- Kazakhstan: Trade missions led by David Willetts, former Minister of State for Universities and Science, and Lord Livingston, Minister of State for Trade and Investment, identified areas for Kazakhstani-UK engagement on education and training, and saw the signing of a Memorandum of Understanding between the UK and the Kazakhstan Ministry of Education and Science to facilitate this work
- Latin America: UK engagement, via the team's ELT Working Group, with Peru and Colombia to design and support systemic English language programmes to build teachers' and pupils' English language capability (see case study opposite)
- **UK capacity building:** with support from expert advisers working in the education sector, the team hosted workshops to build know the analogability to work internationally amongst UK TVET organism on sufficient planned in 2015/16 for TVET and ELT providers
- Schools in the Gulf: launched a program port for UK schools and providers of associated resources and per training interested in establishing schools in Qatar, as part of the Lusail City development, and in the United Arab Emirates

Case study: Turn-key Peruvian English language of ramme

In July 2014, the President of Peru announced in the lational Day speech a vision to make Peru bilingual in English by 2021. The Peruvian Minister of Execution requested the UK's support.

Working to tight deadlines, UKTI Educate at a text ELT Working Group developed a tailored UK solution to help Peru deliver this a poit in The ELT Working Group, comprising eight organisations representing the majority of UK's English language providers, explored Peru's needs and priorities, working with the Peruvian Ministry of Education and other government organisations. The team, supported by Working Group members, presented a UK proposal to the Minister for a programment beautive of the livered through a UK sector consortium, with tenders for specific providers to delive out the plan.

In November 20 to the Peavian Minister of Education visited the UK to sign a Management of Understanding with the UK government supporting engagement on English language training. Through the competitive tenders, supported by UKTI Education and the peaview of the Peruvian Ministry selected UK pather for initial work under the programme. In the first phase (alread anderway), UK universities will be training 200 Peruvian teachers in the UK, with ELT summer schools for an additional 400 others taking place in Peru.





Priorities for the high value education opportunities programme in 2015/16

The International Education Strategy sets the ambition for UKTI Education to help the UK education and training sector secure £3 billion of new business overseas by 2020, now part of government's 2020 Export Drive.

The team's work to date has identified tangible, large-scale education projects in a number of our priority markets. These projects will be the focus of the team's delivery work over the next 18 to 24 months, with dedicated resources to pursue each one. They include high value education opportunities in:

- China
- Kazakhstan
- Latin America (particularly Peru and Colombia)
- Malaysia
- Qatar
- Saudi Arabia
- United Arab Emirates

In addition, we are working to support a DflDfunded project to build the skills of local people for the growing oil and gas industry in East Africa (Kenya, Mozambique, Tanzania and Uganda).

Each of these projects is different in scale nature and stage of development. Projectypically cover a number of sub-sectors in each market or region. For this reason, the team's plans to support the UK sector to access each project vary. An example of the type of support provided as part of the high value education opportunities programme is detailed in the Saudi Arabian case study on page 7.

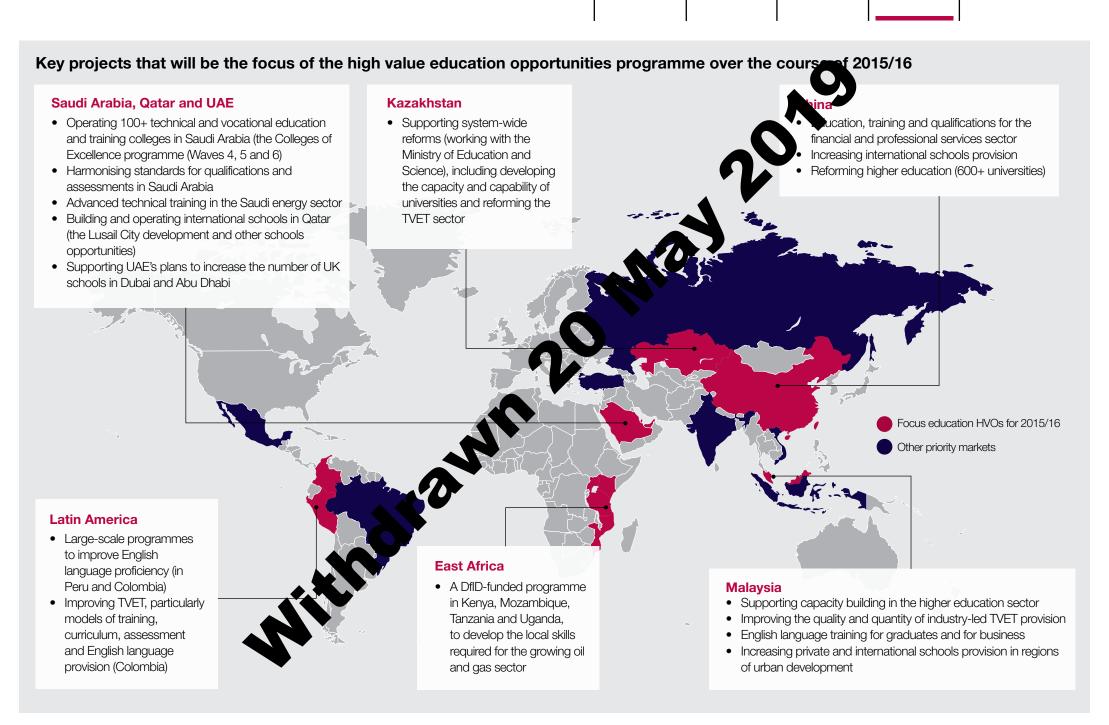
All high value education projects are open to any UK organisation, whether small, mediumsized or large. Additional information on the tangible contract opportunities that compeach project is available over the page after UKTI Education.

Whilst delivery plans will focus on the spects identified above, the team also on the sits work to identify and test operate ities in our other priority markets and speep a watching brief for potential news writy markets. This should enable us to stop ament the high value education opportunities programme over time.

The team to continues to look for scope to extension high value education cope with s, building long-term relationships thesis overseas governments and partners with eir education system development. Sporting UK providers already delivering under these programmes is an important part of that work, looking to ensure the quality of UK education provision overseas is always second to none.

"All high value exucation projects are open to any UK of vanisation, whether small, medium vize I or large."





Planned events to support the high value education opportunities programme

Timeline of planned events

| Event | Time of year |
|--|---------------------------------|
| Saudi Arabia briefing for Colleges of Excellence (Wave 4) | March/April 2015 |
| Educational technology network event | March/April 2015 |
| Qatar (Lusail) schools phase 2 event | April/May 2015 |
| Teacher education network event | Spring 2015 |
| Kazakhstan market briefing | Spring 2015 |
| English language training capability-building events co-hosted with members of the ELT Working Group | Summer/Autum 15, Spring 2017 |
| TVET capability-building event | S. er 2015 |
| Malaysia market briefing | Summer 2015 |
| UAE schools events | Summer 2015 |
| China GREAT event: financial and profes al services (in-market event) | Autumn 2015 |

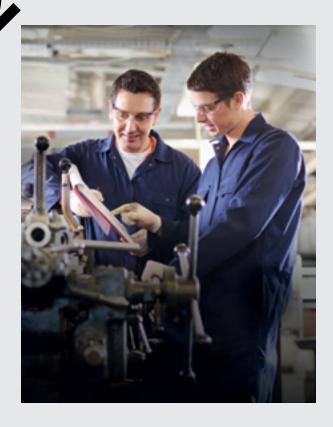
Cross-sector themed groups

The team is developing a prober of cross-sector themed spot as a particular UK education be set that match high denotes a number of priority markets at high value education projects. Concern vocus areas are:

- Juage training
- Dilling gas education and training
- Te er training
- Educational technology

The team is using sector networking groups to develop focused marketing materials and UK propositions in each of these areas. These groups include a range of representative bodies, UK firms and organisations from the relevant focus areas, meeting as and when opportunities arise.

The potential benefits of this sectoral approach are illustrated by the ELT Working Group's co-ordinated and successful response to Peru's request for UK engagement in its plan to make the nation bilingual in English by 2021 (see case study on page 7).



"The team is using sector networking groups to develop focused marketing materials and UK propositions." UKTI Core list for the education and training sector

In addition to the events organised and run by UKTI Education to help organisations to access the high value education opportunities programme, UKTI's Events, Missions and TAP team provides a range of support to help education and training organisations attend established international exhibitions. The Events, Missions and TAP team also provides funding to accredited sector bodies and trade associations to run approved events and missions.

A panel of sector representatives has been established to review the Core list of these events to ensure it supports the needs of the education and training sector. The Sector Panel held its first meeting in January 2015 to discuss the Core list for 2015/16 and will meet regularly.

Support offered by the UKTI Events, Missions and TAP team at these events may include one-to-one meetings, "meet the Commercial Officer", networking and/or grants to exhibit. For further information, please contact support@uktieventspecialist.com.

The Core list of education and training events identified for support in 2015-16 includes:

Launchpad series (for new education exporters)

UK locations to be announced Four workshops planned for 2015/16

WorldSkills

Brazil 11-16 August 2015

BETT Asia

Location & dates to be announced

Learning & Teaching Expo

Hong Kong 10-12 December 2015

BETT Show

London 27-29 Januar

GES. (Ib

Date be announced

Education Show

Birmingham

Dates to be announced







Useful contacts

UKTI Education's website contains further information on the high value education opportunities programme, the team's priority markets and upcoming events for UK education and training organisations. UK organisations can also access a dedicated Education Opportunities landing page, including pre-filtered international education business opportunities posted by a range of government departments engaged in supporting the sector.

The website also provides detailed information on the UK's education and training capabilities including case studies from a range of sector participants. Find out more at:

www.gov.uk/ukti-education

If you'd like to contact UKTI Education directly, please email the team at: ukti-education@ukti.gsi.gov.uk

UKTI's network in the UK and overseas

UKTI has a network of International Trade Advisers (ITAs) based in partner organisations across the UK. Every region has a dedicated ITA who supports the education and training sector, offering specialist guidance and helping organisations to access both the high value education opportunities programme and other UKTI services. For hidentifying the right support for your business, contact your local to the UKTI website:

www.gov.uk/ukti

UKTI staff in embassies and high commissions over as work closely with UKTI Education to support UK education and value, organisations to access high value opportunities in the team's priority markets. To contact UKT since eas, go to the UKTI webpage for the relevant. Let, which can be found under the letter 'U' at:

www.gov.uk/government/world/organisations



Wider government support for international education

In addition to helping UK education and training organisations to do business internationally, UK government departments undertake a wide range of activities related to the promotion and support of education abroad, as outlined below. Much of this work supports the work of UKTI Education, and the team work in partnership with other government departments and bodies wherever appropriate.



BIS leads on UK government international education policy, as well as international science and innovation policy. BIS manages the government's £375 million Newton Fund, which supports the economic development of partner countries through science and innovation capacity building, and jointly funds UKTI Education.



<u>DfE's</u> international education activities centre on:

- International benchmarking of England's education performance
- Fostering relationships with, and learning from, high performing jurisdictions
- Facilitating policy exchanges and strengthening capacit with other countries
- Representing DfE and BIS interests in the multilater system; including the European Union and Constitution for Economic Co-operation and Development
- Responsibility for European school
- Regulating British Schools Oversea independent sector



DFID's education activities are suised on the poores countries, where DFIC to to:

- Improve acce and adality of primary education
- Improve economic portunities for girls and women
- Support highs pucation through capacity building at individual, departmental and institution level



FCO's education activity with the rseas embassies can include:

- FCO Prosperity officers that to identify small-scale project opportunities that could strengthen the lost government's education capability and also bilateral relations with the UK
- Participation at post in cross-government teams focusing on education, innovation and research
- The prome of the UK's education offer through diplomatic activity, for example by uran sing the price to education exchanges



me Office contributes to education exports by:

- Having an excellent offer for international students. Anyone with a sufficient level of English, funds to maintain themselves, relevant qualifications and a genuine intention to study are welcome. We also have excellent post-study work options available
- Tackling immigration abuse and creating a safe environment for genuine students, helping to ensure that we remain highly competitive in the international student market
- Supporting institutions to understand and fulfil their responsibilities through UK Visas and Immigration's Premium Customer Service for sponsors, the Educators Helpdesk and the Higher Education Assurance Team



<u>The British Council's</u> purpose is to create international opportunities for the people of the UK and other countries and build trust between them worldwide. The British Council's role in education is to work internationally to share and promote:

- The UK's education assets
- Collaboration in education research, innovation and knowledge exchange
- A wider knowledge of the English language
- The exchange of students, researchers and education professionals and leaders
 The British Council also provides paid-for services in areas including English language
 teaching, professional development for teachers, examinations and international education
 marketing services; and also supports education system transformation and policy reform
 globally. The British Council receives a core government grant and is a registered charity
 incorporated by Royal Charter and a non-departmental public body

"Many thanks for giving us the opportunity to participate in the Kazakhstan Intergovernmental Commission. It was an amazing event and offered a number of interesting opportunities, both in Kazakhstan and the UK, as well as exploring other areas of possible co-operation. Please pass my thanks to all those in the team both in the UK and Kazakhstan who made the event run so smoothly and who had worked so hard to bring this about in a very short space of time; it was very much appreciated." City & Guilds

"The educational resources industry and particularly 'edtech' has tremendous potential for greater export. The prospects are diverse, from major opportunities to help supply system-change across entire countries to openings for good and regular business for individual companies; we need the complete mix. With BIS/UKTI help, BESA has been mentoring 55 start-ups in the past year, plan strong emphasis on developing export an early feature of their business plann Sector Panel drawing us closer we learn from each other's success Education promoting the sector more widely. we look forward to the b f a co-ordinated rategy." and sustain and sustain the contrategy."

British Educational unpliers Association

'The support offered by the UKTI Education eam and International Education Strategy has helped Further Education colleges to develop a more effective approach to their international work. UKTI Education has helped the sector to identify opportunities in several key markets. It has also allowed colleges to establish links with the wider UK education sector which has helped to enhance our offer to international partners. The International Strategy has helped the UK education sector to develop a more strategic and collective approach that will lead to successful outcomes and increased confidence in reaching our international ambitions."

Association of Colleges

"Working with UKTI Education in Kazakhstan has enabled us to reach the widest possible range of UK providers both for the British Council's own programmes, and for the commercial education opportunities we want to promote to the UK education sector. UKTI Education's convening power within the UK sector is enormou valuable for us in achieving our and wider cultural relations a

British Council

the highly competitive world of international education, the UKTI Education team continue to deliver effective strategic support to our 400+ member organisations which include premium British schools overseas and UK commercial companies which export high quality products, services and training worldwide. Through ongoing consultation, by active participation in our conferences and by facilitating transnational government to government discussion, UKTI Education clearly makes a significant contribution to growing the economic potential and long term political influence connected to the British schools overseas sector."

Council of British International Schools

"Thank you so much for coming in to present to our Board about what UKTI Education is doing and the opportunities that exist. It was the most productive discussion we've had about our international strategy, and your presentation really set the tone for that, so thank you."

University Alliance







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