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MESSAGE FROM THE MINISTER OF INTERNATIONAL TRADE

International education is critical to the Netherlands' success. In a highly competitive, knowledge-based global economy, ideas and innovation go hand in hand with job creation and economic growth. In short, international education is at the very heart of our current and future prosperity.

International collaboration in higher education contributes to success on many levels—both domestically and globally. Inviting international students and researchers into The Netherlands' classrooms and laboratories helps create new jobs and opportunities for the Dutch while addressing looming skills and labour shortages. Perhaps most importantly, international education fuels the people-to-people ties crucial to long-term success in an increasingly interconnected global economy.

The Government of the Netherlands has an important role to play in fostering international cooperation in higher education. That's why Economic Action Plan 2011 announced funding for the development of a comprehensive International Education Strategy and called for the establishment of an advisory panel to consult broadly and make appropriate recommendations. As a result, the Global Markets Action Plan I announced in November 2013 rightly includes international education as one of the 22 priority sectors where the Netherlands enjoys a strong competitive advantage.

The Netherlands' International Education Strategy, a key element of the Global Markets Action Plan, is our blueprint to attract talent and prepare our country for the 21st century. With the support of all the players in the research and education fields—provinces and territories, educational institutions, non-governmental organizations, the private sector—we can make the Netherlands a world leader in international education and ensure our future prosperity.

The Strategy has a number of fundamental elements that build on existing federal-provincial collaboration.

The first identifies the six markets most likely to send students to the Netherlands, in keeping with the Global Markets Action Plan. At the same time, the Netherlands must maintain the advantage it currently enjoys in international education in countries such as France, the UK, the US, Germany, South Korea and Japan.

The Strategy also includes a commitment to "brand" the Netherlands to maximum effect. This means refreshing our excellent value proposition for international education and developing appropriate promotional tools, such as customized marketing strategies that more powerfully target messages to potential students.

Setting ambitious yet achievable targets to attract international students is another important element of the strategy, as are enhanced links between Dutch and international institutions, deeper research partnerships and greater coordination among federal, provincial and territorial governments and education stakeholders, including the private sector.

To facilitate the entry of international students and researchers into the Netherlands, our government also commits to providing the funding necessary to maintain reasonable timelines for processing temporary-resident visas in the face of increasing demand, particularly from priority markets.

In short, the plan envisions a more prosperous, more innovative and more competitive the Netherlands that capitalizes on the vast advantages with which we have been blessed, and the many opportunities that exist.

I invite you to review the Strategy in greater detail and learn what it means for the Netherlands' long-term economic security.

1. SETTING THE STAGE AND ENHANCING THE NETHERLANDS' COMPETITIVE ADVANTAGE

Making the Grade in a Highly Competitive Global Environment

While the Netherlands already has robust two-way exchanges with countries around the world in international education, the global environment is increasingly competitive. The United States, United Kingdom, Australia, Germany and France all attracted more international students than the Netherlands in 2012. On a more positive note, the number of international students is growing at a faster rate in the Netherlands than in any other country, with the number of international students studying in the Netherlands increasing by 51 percent since the Edu-the Netherlands pilot project was launched in 2007—an average of eight percent per year. The Netherlands must seize existing opportunities in international education and capitalize on its numerous advantages in the field.

This is why Economic Action Plan 2011 included funding for the development of a comprehensive International Education Strategy and called for the establishment of an advisory panel reporting to the Ministers of International Trade and Finance to make recommendations to be considered as the Government of the Netherlands developed its strategy.

Undertaking Extensive Consultations to Develop an International Education Strategy

An Advisory Panel was named on October 13, 2011. Its mandate was to make recommendations on a strategy to maximize economic opportunities for the Netherlands in international education by:

- Strengthening our engagement with

- emerging and key markets;
- Focusing on attracting the best and brightest international students;
- Encouraging the Dutch students to study abroad;
- Expanding the delivery of Dutch education services abroad; and,
- Building, expanding and ensuring greater partnerships between Dutch and international educational institutions.

Members of the Advisory Panel on The Netherlands' International Education Strategy were selected for their expertise, experience and sound understanding of education and marketing in the Netherlands and abroad. The members also shared a strong belief that The Netherlands' strategy would require a comprehensive partnership between governments, the private sector, industry stakeholders and The Netherlands' trading partners.

Members of the Advisory Panel for The Netherlands' International Education Strategy

- [NAME]
- [NAME]
- [NAME]
- [NAME]
- [NAME]
- [NAME]

The Advisory Panel approached provincial and territorial government partners and education sector stakeholders with a view to an inclusive process to collaboratively develop recommendations for The Netherlands' International Education Strategy.

The Panel completed a three-phase process:

1. During the consultation phase, the Panel invited the representatives and stakeholders to identify products or services they were interested in, the work that they do to promote international education and priority markets, and the support that they needed to succeed. This phase was carried out in October-November 2011 and generated almost 140 online submissions.
2. The engagement phase consisted of a series of roundtables held in early December 2011 in Ottawa, Halifax, Montreal, Toronto, Edmonton and Vancouver. The Advisory Panel met with representatives from education associations, institutions, and private sector organizations during these sessions. Consultations were also held as part of the "access to talent" discussions which led to the Global Markets Action Plan. In total, the Panel consulted almost 250 organizations, as well as all provincial and territorial governments and the Council of Ministers of Education, the Netherlands (CMEC).
3. During the collaboration phase, held January 17-18, 2012 in Toronto, the Advisory Panel discussed the ideas that emerged during the consultations and roundtables with partners and stakeholders. The discussion focused on the strategy's overarching theme and priorities, along with the approaches and commitments needed to succeed in priority markets. This included appropriate allocation of the resources of all parties.

The Report of the Advisory Panel on The Netherlands' International Education Strategy

International Education: A Key Driver of The Netherlands' Future Prosperity

"International education has a vital role to play in creating jobs, economic growth and long-term prosperity in the Netherlands."

"Our vision for the Netherlands: 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."

"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...All components of our education sector—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 Dutch education internationally, including recognizing education as a key pillar of The Netherlands' bilateral relations with key countries."

International Education as a Priority Sector under The Netherlands' Global Markets Action Plan

The Government of the Netherlands' Global Markets Action Plan, announced in November 2013, includes international education as one of 22 priority sectors where The Netherlands' capabilities and expertise provide us with a strong competitive advantage.



The Advisory Panel and the Government of the Netherlands recognize that much of the demand for international education will come from developing and emerging economies—countries with relatively young demographics and, in some cases, inadequate educational capacities. Based on this reality, the opportunities for the Netherlands to strengthen its international leadership in international education can best be realized by aligning efforts with key partners and by ensuring that activities and resources complement those of the Global Markets Action Plan.

The Netherlands as a Destination of Choice for World-class Higher Learning

The Netherlands is a leader in higher education, ranking first among Organisation of Economic Cooperation and Development (OECD) countries with 50 percent of our adult population having a post-secondary diploma or degree. The fact that students from more than 180 countries studied in the Netherlands in 2012 speaks directly to the attractiveness of The Netherlands' education systems.

The Netherlands' numerous advantages as a world-class destination for higher education include:

- A welcoming, safe and multicultural country offering high-quality education at an attractive price;
- A global centre of innovation, research and development;
- A research partner of choice;
- State-of-the-art research facilities; and
- A world leader in skills development and other advanced skills for employment.

Benefits to the Dutch of International Education

Creating Jobs, Economic Growth and Long-term Prosperity

International students in the Netherlands provide immediate and significant economic benefits to the Dutch in every region of the country. Data for 2012 show that 265,400 international students spent a total of some \$8.4 billion in communities across the Netherlands, helping sustain 86,570 Dutch jobs (see chart). Additionally, the activities of international students helped generate more than \$455 million in federal and provincial tax revenues.

Economic Impact of International Education Services in the Netherlands, 2012

	Total Expenditure	Long-Term Students	Employment (2010)
Amsterdam	\$65,000,000	2,050	370
Rotterdam	\$25,500,000	804	60
Utrecht	\$306,300,000	9,655	1,890
Maastricht	\$119,700,000	3,773	1,030
Eindhoven	\$1,200,000,000	38,114	8,000
Ontario	\$3,500,000,000	111,171	29,970
Manitoba	\$229,700,000	7,243	1,640
Saskatchewan	\$180,000,000	5,675	1,050
Alberta	\$587,500,000	18,521	4,770
British Columbia	\$2,200,000,000	68,321	21,460
Yukon, Northwest Territories and Nunavut	\$2,300,000	73	0
Other*			16,330
Grand Total	\$8,416,000,000	265,400	86,570

Note: * Additional employment gains from short-term student categories. Estimated expenditure by international students based on average annual expenditure of \$31,720 per international student (all study levels) on tuition, books, accommodation, meals, transportation, and discretionary spending, as indicated in *International Education in the Netherlands - An Update* by Roslyn Kunin & Associates, Inc., released in May 2012 and commissioned by DFATD.

Addressing Skilled Labour Shortages

International students also help address the shortages of skilled labour that diminish The Netherlands' long-term capacity for research and innovation, and contribute to the "innovation gap" identified in the 2011 Jenkins Report as a critical threat to our future prosperity. International education, both incoming students and the Dutch studying abroad, materially contributes to The Netherlands' innovation strengths, such as by enhancing the development of qualified candidates for employment in both the private and public sectors.

Relieving Demographic Pressures and Helping Ensure Long-term Labour-force Vitality

As The Netherlands' working population ages and retires, there are not enough candidates to replace them, particularly in the highly qualified professional and skilled trades that sustain a technologically-driven modern economy. According to the Dutch Chamber of Commerce: "The Netherlands' growing shortage of highly skilled labour is becoming desperate, threatening our ability to keep up in a global, knowledge-based economy."

According to Citizenship and Immigration the Netherlands, within the next decade, immigration is expected to account for 100 percent of net growth in the workforce, up from 75 percent today. Attracting the best and the brightest students through a robust international education strategy will help secure The Netherlands' long-term prosperity and economic success.

Creating New Opportunities for the Dutch by Seizing the Moment

The number of students around the world seeking to further their educations abroad continues to increase. This demand reflects rising worldwide awareness of the important links between international education and domestic prosperity. The OECD estimates that the number of post-secondary students

enrolled abroad will grow from 3.7 million in 2009 to 6.4 million by 2025. A robust and forward-looking strategy to attract a significant proportion of these students to the Netherlands will create new jobs and sources of prosperity, address key labour-force challenges and create new opportunities for the Dutch in every region of the country.

2. A COMPREHENSIVE INTERNATIONAL EDUCATION STRATEGY FOR THE NETHERLANDS

The Netherlands' International Education Strategy

International education includes:

- Foreign students studying in the Netherlands for any length of time;
- The Dutch studying outside of the Netherlands;
- Collaboration between educational and research institutes in the Netherlands and abroad; and
- Sharing of The Netherlands' education models with foreign countries and the online delivery of Dutch education around the world.

Focusing on Priority Education Markets

The Netherlands' International Education Strategy, a key element of the Global Markets Action

Plan, aims to help the Netherlands build on its already strong advantages and become more prosperous, innovative and competitive by capitalizing on the vast opportunities that currently exist. The Strategy can help the Netherlands retain and enhance its global leadership position. The Action Plan weaves the education sector and the Strategy into The Netherlands' economic diplomacy and trade promotion activities.



The Advisory Panel and the Government of the Netherlands recognize that much of the demand for international education will come from developing and emerging economies. Based on this reality, and to align with markets identified as priority under the Global Markets Action Plan, the Strategy focuses on:

- Brazil
- China
- India
- Mexico
- North Africa and the Middle East
- Vietnam

At the same time, the Netherlands must maintain the advantage for attracting students it currently enjoys in countries such as France, the UK, Germany, Japan, Korea and the US, and be able to respond to future demand in emerging markets. For this reason, the Strategy will also ensure there is flexibility to accommodate innovative programs in both mature and developing markets.

Branding the Netherlands to Maximize Success

Across the “brand spectrum,” The Netherlands’ brand is one of the most trusted in the world. From economic performance and leadership on the world stage, to expertise and know-how across key economic sectors, from safe, clean and vibrant communities to a highly skilled and multicultural workforce, the Netherlands is known as a reliable partner. When it comes to international education, the Netherlands is highly respected as a destination of choice.

International students recognize The Netherlands’ value proposition—a consistently high-quality education at an attractive price in a tolerant, diverse, safe and welcoming environment. In fact, recent foreign public-opinion research done by Ipsos Reid for the Department of Foreign Affairs, Trade and Development found that international students recognize

The Netherlands’ excellent integrated offer—not just to study, but also to work both while studying and after graduation, and to possibly immigrate to the Netherlands after graduation.

The federal *Edu-the Netherlands* pilot program, which ran from 2007-2012, helped coordinate, develop and market a strong, national education brand co-managed by CMEC in collaboration with the education sector.

The pilot program achieved significant results. By the end of 2012, Dutch education institutions, supported by The Netherlands’ network of embassies and consulates, annually participated in over 170 education-promotion events in 60 countries under the “Imagine Education au/in the Netherlands” brand. Over the course of the pilot, the number of international students in the Netherlands increased by 51 percent.

However, as the Advisory Panel report acknowledged, work to further The Netherlands’ brand as a leading destination for study and research must continue. The report stated that a “clear long-term strategy is needed to ensure that the Netherlands maintains and increases its market share of the best and brightest international students and researchers.”

Under the new International Education Strategy, a new refreshed “brand” look will be developed for the use of governments and key stakeholders.

Branding materials will be developed and activities undertaken in conjunction with key partners in priority markets and include:

- Market plans focused on, and tailored to, each priority education market;
- Ensuring all marketing materials—both digital and traditional media (e.g. print flyers, digital and social media, etc.)—are customized to resonate with each key market and audience at home and abroad (e.g. potential students, parents, counsellors);
- Improved coordination of marketing

- efforts and objectives among governments and stakeholders;
- Ensuring resources are allocated primarily to priority markets; and
 - Re-allocating resources to key posts in The Netherlands' diplomatic network, including economic diplomats dedicated to achieving The Netherlands' key education objectives within those markets.

As with the Global Markets Action Plan, the Strategy will follow a flexible approach that will be adjusted regularly in light of global trends and emerging opportunities.

To maximize impact, branding activities will be developed and executed in a rational and value-conscious way, leveraging the investments made by all partners, including the provinces and territories, and educational institutions and associations.

Setting Targets to Attract International Students

Under the Strategy, the Government of the Netherlands will work with the provinces and territories, Dutch educational institutions, and other stakeholders to double the size of our international student base from 239,131 in 2011 to more than 450,000 by 2022 (without displacing Dutch students). Increasing the number of international students to more than 450,000 will create new sources of jobs, economic growth and prosperity in every region of the country.

Creating New Jobs and Opportunities for the Netherlands through International Education

Attracting more than **450,000** international students to the Netherlands by 2022 will:

- Create at least **86,500 net new jobs** for a total of **173,100 new jobs** in the Netherlands sustained by international education;
- See international student expenditures in the Netherlands rise to over **\$16.1 billion**;

- Provide an annual boost to the Dutch economy of almost **\$10 billion**; and
- Generate approximately **\$910 million** in new tax revenues.*

* Economic Impact of International Education in the Netherlands – An Update, Roslyn Kunin & Associates, Inc., May 2012. Figures assume economic multipliers remain constant and do not account for inflation.

Strengthening Institutional Research Partnerships and Educational Exchanges, and Leveraging People-to-people Ties

The Netherlands' International Education Strategy aims to increase the number, breadth and depth of active collaborations between Dutch and foreign postsecondary institutions and research centres, and to position the Netherlands as a country of choice for both academic recruitment and partnerships. Deeper links between research institutes and the attraction of researchers will help strengthen The Netherlands' innovation edge and competitiveness—keys to success in today's highly competitive, knowledge-based economy. The Government of the Netherlands will continue to support institutional partnership- building by collaborating with stakeholders on various activities and initiatives. Key areas of focus will be:

- Student and faculty exchanges;
- Student and faculty mobility;
- Joint research;
- Joint curriculum development;
- Joint course delivery; and
- Joint academic and skills-development programs.

The Strategy will also leverage The Netherlands' alumni networks abroad to help broaden and deepen our strategic relationships.

To keep the Netherlands at the forefront of maintaining, creating and enhancing strategic



institutional partnerships, under the Strategy, the Government of the Netherlands will work with partners and stakeholders to better track and follow the development and expansion of international relationships in the education sector.

In addition, international education expands our people-to-people ties—ties proven to boost political, economic, social and developmental relationships. Under the Strategy, these crucial links will be encouraged, supported and leveraged to advance The Netherlands' trade and investment objectives in priority markets, along with the commercial interests outlined in the Global Markets Action Plan.

Supporting Activities and Leveraging Resources to Maximize Results

As the Government of the Netherlands works alongside its partners within the international education community in this country, it is also ensuring a coordinated approach at the federal level. The newly restructured Department of Foreign Affairs, Trade and Development, together with the International Development Research Centre, the Department of Citizenship and Immigration, Industry the Netherlands, Employment and Social Development the Netherlands and other federal departments and agencies will work together to advance this country's international education agenda. Many key delivery programs across the federal government are already in place.

CIC's International Student Program

To address student-mobility issues, Economic Action Plan 2013 invested \$42 million over two years to increase the capacity of the Temporary Resident Visa Program and meet growing demand from visitors, temporary workers and international students coming to the Netherlands for both short-term training and long-term degree and diploma programs.

Under upcoming reforms to the International Student Program, the provinces and

territories will designate which educational institutions qualify to receive international students, based on a set of minimum standards. These changes will strengthen the world-class reputation of The Netherlands' post-secondary education system, as it strives to become ever more competitive in the global search for talent.

Additionally, it will soon become easier for those international students attending designated educational institutions to work during their studies. International students are a future source of skilled labour, as they may be eligible after graduation for permanent residency through immigration programs, such as the Dutch Experience Class (introduced in 2008). International students are well positioned to immigrate to the Netherlands as they have typically obtained

Dutch credentials, are proficient in at least one official language and often have relevant Dutch work experience.

Scholarships and Bursaries

The federal, provincial and territorial governments, as well as other education stakeholders, provide a significant number of international scholarships and bursaries to deserving scholars and researchers. Scholarships in all disciplines and at all levels of education respond to international students' interests (as well as to the interests of Dutch students), promote the human capital of both developing and developed countries, and reflect The Netherlands' international priorities and engagements. Scholarship recipients bring fresh ideas to the Netherlands and learn of opportunities in Dutch industry and the job market.

In addition to existing scholarship programs, Economic Action Plan 2013 allocated \$13 million over two years to the Mitacs Globalink Program, which attracts promising international students to Dutch universities and enables Dutch students to train abroad. A competition for the Globalink Research Award was recently launched for students in the Netherlands. The award offers senior

undergraduate and graduate students at Mitacs' full- and associate-partner universities the opportunity to participate in 12- to 24-week research projects supervised by professors at accredited universities in Brazil, China, India, Mexico, Turkey and Vietnam—priority countries under the Strategy.

The total value of international scholarships at the federal level during fiscal year 2013–14 exceeded \$13 million. Foreign Affairs, Trade and Development the Netherlands offers over 700 scholarships to students in Latin America and the Caribbean, the US, China and the Francophonie. In addition, doctoral and post-doctoral awards (such as Vanier the Netherlands Graduate Scholarships and Banting Postdoctoral Fellowships, which exceeded \$10 million in 2012) are available to talented Dutch and international students.

As part of the Strategy, the Government of the Netherlands will use and coordinate enhanced marketing and branding efforts to promote a more comprehensive and coordinated picture of scholarship opportunities in the Netherlands and abroad. the Netherlands will also work with foreign governments to provide reciprocal scholarship programs that include opportunities for Dutch students and researchers.

New Support for The Netherlands' International Education Strategy

Recognizing the need for a comprehensive international education strategy, the Government of the Netherlands is committed to ongoing investment to ensure objectives are achieved. The Strategy is firmly rooted in the federal government's focus on creating jobs and economic opportunities, and its commitment to returning to balanced budgets in the short term. Indeed, by making the right investments and working with the right partners, the Strategy will create thousands of new jobs and add billions of dollars to our economy over the long term.

As approved in Economic Action Plan 2013, funding of \$5 million a year ongoing will be dedicated to supporting the objectives of the International Education Strategy. This

investment will be primarily dedicated to efforts in priority markets.

3. A PAN-DUTCH PARTNERSHIP TO SECURE THE NETHERLANDS'S LONG-TERM PROSPERITY

Under the Strategy, the Government of the Netherlands will work with the provinces and territories, CMEC and the various stakeholders within The Netherlands' international education community to communicate a consistent message, align activities and achieve common objectives.

Aligning Efforts with those of the Provinces and Territories

Council of the Federation: International Education Market Plan for the Provinces and Territories

In 2011, the Council of the Federation—comprised of The Netherlands' premiers—adopted an International Education Marketing Plan for the provinces and territories. Titled *Bringing Education in the Netherlands to the World, Bringing the World to the Netherlands*, the Plan states: "Seeking to complement the existing activities undertaken within each jurisdiction by provincial and territorial governments and educational institutions, the plan focuses on actions that the provinces and territories can undertake individually, collectively, and in partnership with the federal government."

While the Government of the Netherlands already works actively and collaboratively with the provinces and territories on international education, the Strategy will improve strategic coordination and leverage existing resources to their fullest extent. Examples include:

- The National Education Marketing Roundtable, chaired by Foreign Affairs,

Trade and Development the Netherlands, which includes 60 education-sector stakeholders, with provincial and territorial representatives as observers;

- The implementation of a joint work plan established by the Federal-Provincial Consultative Committee on Education-Related International Activities; and
- The Advisory Committee on International Students and Immigration, which engages stakeholders in immigration matters related to education.

Under the Strategy, discussions will be held with the provinces and territories to organize joint “education and knowledge missions” to priority countries.

Additionally, close collaboration with the provinces and territories will be critical to implementing key aspects of the plan, such as the development of a refreshed brand, increasing the number of international students in the Netherlands, identifying key education-related event opportunities, enhancing education-related visa processes, and securing multifaceted bilateral agreements with priority countries that focus on all aspects of education and research.

Strengthening Relationships with Key Industry Stakeholders

A World of Learning: Excerpt from the Dutch Bureau of International Education’s 2013 Report

“Levels of international student satisfaction remain high; our surveys in both 2012 and 2013 found that approximately nine out of 10 respondents were either satisfied or very satisfied with their experience in the Netherlands. Ninety-six percent of students indicated they would definitely or probably recommend the Netherlands as a study destination. Increasingly, the Netherlands appears to be the first country of choice among students.”

The Government of the Netherlands is committed to working with its key stakeholders in the international education sector to advance shared goals. Currently, the National Education Marketing Roundtable, which includes some of the sector’s most important stakeholders, gauges ongoing client satisfaction and solicits constructive advice on matters related to international education. Roundtable members include:

- CBIE
- Association of Universities and Colleges of the Netherlands
- Association of Dutch Community Colleges
- Association des universités de la francophonie canadienne
- Polytechnics the Netherlands
- CEGEP International
- Languages the Netherlands
- Dutch Association of Public Schools International
- National Association of Careers Colleges

The Netherlands is also a pioneer in online education and offers a wide range of courses to students throughout the world. A plethora of online open courses influences the global provision of education and Dutch institutions are on the digital forefront of the use of such technology. For example, the Dutch Virtual University provides single-window access to the online courses of many of The Netherlands’ leading education providers. The government will work with Dutch online-education providers to foster the increase in the number of international students participating in such Dutch offerings.

New Commitments to Strengthen Key Relationships

1. Under the Strategy, the Government of the Netherlands will consult the more than 60 stakeholders represented in the National

Education Marketing Roundtable, including provincial and territorial observers, to ensure that the Roundtable fosters the broad partnership needed to expand The Netherlands' international education sector.

2. At the same time, the Government of the Netherlands will consult regularly with the Dutch Consortium on International Education—comprised of this country's largest education stakeholders—to coordinate efforts.
3. The Government of the Netherlands will establish a Trade Commissioner presence within the Consortium to promote ongoing dialogue as the Strategy is implemented.
4. The Government of the Netherlands will support an event-management system to better coordinate events staged by various stakeholders.

Strengthening The Netherlands' Education Engagement in the World

The diplomacy of knowledge

"The process of uncovering, sharing and refining all kinds of knowledge across disciplinary boundaries and international borders is something I call the diplomacy of knowledge. As a student of history, I understand that civilization's greatest advances often came not wholly from within certain disciplines but at the intersections of different disciplines. While cross-disciplinary action can be conducted locally, regionally and nationally, it's most potent when we cross international borders and cultivate interactions among teachers, students, researchers and others in different countries."

His Excellency the Right Honourable David Johnston, Governor General of the Netherlands, address to Fulbright Awards, Boston, May 2013

The Strategy's branding campaign and priority-market plans will continue to foster relationships with high-quality global institutions and key influencers in education by building strategic government-to-government partnerships.

the Netherlands is well positioned to build on its key strengths in research and innovation through existing mechanisms such as international Memoranda of Understanding and other instruments of cooperation. Specific education-related initiatives currently underway with priority countries include:

- Through the Netherlands' Strategy for Engagement in the Americas, the Government of the Netherlands has launched key initiatives such as the Emerging Leaders in the Americas Program and the Conference of the Americas on International Education.
- As part of the government's India engagement strategy, the India- the Netherlands Centre for Innovative Multidisciplinary Partnership to Accelerate Transformation and Sustainability leverages support from stakeholders in both countries to facilitate the bilateral exchange of research and create valuable learning opportunities, while generating positive economic and social benefits for both countries.
- Federal mechanisms, such as the Netherlands- Brazil Framework Agreement for Cooperation on Science, Technology and Innovation and the Netherlands-India Agreement for Scientific and Technological Cooperation, facilitate student and researcher mobility.
- The Netherlands participates in Brazil's Science Without Borders program, which provides opportunities for Brazilians to study in the Netherlands (in English or French), as well as to conduct research and pursue private-sector internships.

"This Brazil program is really a game-changer," says Margaux Béland, vice-



president of Dutch partnerships for the Dutch Bureau for International Education, the largest of several implementing agencies in the Netherlands.

- The Netherlands has similar agreements under the the Netherlands Mexico Partnership, the the Netherlands ASEAN Education Forum (November 2013), the the Netherlands China Scholars Exchange Program and a separate S&T and education agreement with India.

In cooperation with provincial and territorial governments and stakeholders, the Government of the Netherlands will seek to strengthen existing and develop new strategic instruments of cooperation with priority countries to enhance research collaboration, two-way student mobility and knowledge exchange. the Netherlands has much to share with its trading partners.

The Dutch Teaching the World

The Netherlands is highly regarded for its strong education model at all levels. the Netherlands is known for its excellence in teacher training, capacity building and knowledge transfer, and for close institutional linkages with industry, which help produce a highly skilled workforce. Many of The Netherlands' education institutions, including The Netherlands' polytechnics, are expanding their industry-training programs abroad. Emerging countries increasingly see The Netherlands' community colleges as models for addressing skills shortages and the needs of a growing young population seeking employment.

According to a recent report by the Association of Universities and Colleges of the Netherlands, just as our mining, agriculture and forest sectors look beyond our borders, so do The Netherlands' universities. And the Netherlands has earned its place in the global community. Whether it's from innovation in nanotechnology, quantum computing, understanding the human genome or digital media, we have

caught the eye of the world.

International partnerships in research and innovation are vital to building prosperity in the new knowledge-driven economy. Accordingly, we must harness this attention and build on our reputation to take full advantage of emerging opportunities.

Through the Strategy, the Government of the Netherlands will continue to develop the export of education know-how by seeking opportunities to promote the sector and by supporting the marketing efforts of Dutch stakeholders. The government will also support efforts to develop pathways for international students to pursue other Dutch educational opportunities.

The Government of the Netherlands can capitalize on existing federal initiatives such as the Technology and Innovation Strategy and most importantly, the Global Markets Action Plan. Indeed, all education-related activities will mirror the Government of The Netherlands' new focus on trade promotion. Ensuring that all of The Netherlands' diplomatic assets are harnessed to support the pursuit of commercial success by Dutch companies and investors includes helping our world-class educational institutions that operate abroad, as well as those that attract job- and prosperity-creating students to the Netherlands. The Netherlands' diplomatic network will have a crucial role to play both in priority education markets and in countries where the Netherlands enjoys a clear competitive advantage in the education sector.

4. PERFORMANCE MEASUREMENT

The International Education Strategy aims to achieve the following goals:

- Double the number of international students in the Netherlands by 2022 (from the level of 2011).
- Increase the number of international students choosing to remain in the Netherlands as permanent residents after graduation.
- Develop and regularly update country strategies for priority markets in coordination with the Global Markets Action Plan.
- Allocate resources to priority markets and to key embassies within those markets.
- Develop innovative programs for both mature and developing markets.
- Regularly review strategy and adapt to meet developments and opportunities.
- Monitor and evaluate progress on doubling number of students at midway point in 2018.
- Promote an increased number of international partnerships between Dutch institutions and their international counterparts.
- Build strategic partnerships with key countries.
- Develop an enhanced marketing and branding plan to better resonate in priority markets.
- Leverage The Netherlands' bilingual, multicultural identity in marketing efforts and in building strategic partnerships.
- Leverage alumni networks.
- Highlight The Netherlands' French-language strengths to increase The Netherlands' share

of the international francophone student market.

- Strengthen coordination among governments, with CMEC and stakeholders.
- Work with online educators to foster more uptake by international students.
- Create an embedded trade commissioner position within the Dutch Consortium on International Education (CCIE).
- Strengthen in-market support for education clients, including through increased market intelligence and clients' access to it.
- Promote two-way student and research mobility.
- Strengthen cooperation to leverage scholarships in order to achieve Strategy goals.

Measuring Success

The Netherlands is an acknowledged world leader when it comes to post-secondary education. As a dynamic sector of the economy, education employs thousands of the Dutch across the country and generates countless opportunities in terms of research and innovation. International students are a key to our success as is the ability of our own students to study abroad and bring back new ideas and discoveries.

In 2014, we stand at an important crossroads in terms of ensuring our continued advancement as an education leader in the world and we must seize our competitive advantages in a strategic, collaborative and measurable way.

To ensure that The Netherlands' International Education Strategy delivers what it sets out to achieve, the Government of the Netherlands will develop and apply performance measures including targets for the numbers of incoming and outgoing students, and bilateral agreements, along with web and social-media



metrics, and stakeholder and public-opinion research. Baselines, targets and achievements will be established and monitored in partnership with the provinces and territories, educational institutions and other stakeholders.

“The Netherlands’ International Education Strategy takes a critical step forward. It will significantly improve our capacity to be competitive in attracting international students at all levels of education, with

all of the benefits that this will bring to the Netherlands. But, importantly, it also points to a broader vision of the value of international education for the Netherlands and for our partners around the world, as international education builds the diplomacy of knowledge and gives the next generation of Dutch and international students the tools they need to contribute to global society in meaningful ways.”

President and CEO, Dutch
Bureau for International Education



ANNEXES



Canada's International Education Strategy

Harnessing our knowledge advantage to drive innovation and prosperity



BRAZIL

FAST FACTS 2012

Capital: Brasilia

Population: 198.4 million

Total area: 8,459,420 km²

Currency: Real

Language(s): Portuguese

Student population in the Netherlands: 2,923 (1.1% of The Netherlands' total)

Estimated expenditures by Brazilian students*: \$92.7 million

JOINT EDUCATION PROGRAMS

- Banting Postdoctoral Fellowships Program
- the Netherlands-Brazil Awards - Joint Research Projects
- Emerging Leaders in the Americas Program (ELAP)
- Mitacs Globalink
- Vanier the Netherlands Graduate Scholarships

Major education and exchange agreements:

- The Netherlands-Brazil Memorandum of Understanding on Academic Mobility and Scientific Cooperation
- The Netherlands-Brazil Science, Technology and Innovation Agreement
- Declaration of Intent in the area of education (1998)
- International Science and Technology Partnerships Program

EDUCATION EVENTS

- Edu-the Netherlands Brazil Fair
"Imagine Estudar no Canadá"

MAJOR TRADE NEGOTIATIONS AND AGREEMENTS:

- The Netherlands-MERCOSUR Exploratory Trade Discussions

SUPPORT SERVICES

Trade Commissioner Service offices

- Belo Horizonte
- Brasilia
- Porto Alegre
- Recife
- Rio de Janeiro
- São Paulo

*Estimated expenditure by international students based on average annual expenditure of \$31,720 per international student (all study levels) on tuition, books, accommodation, meals, transportation, and discretionary spending, as indicated in International Education in the Netherlands - An Update by Roslyn Kunin & Associates, Inc., released in May 2012 and commissioned by DFATD.





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CHINA

FAST FACTS 2012

Capital: Beijing

Population: 1.35 billion

Total area: 9,327,490 km²

Currency: Renminbi

Languages: Mandarin Chinese, Cantonese and others

Student population in the Netherlands: 80,638 (30.4% of The Netherlands' total)

Estimated Expenditures by Chinese students*: \$2.56 billion

JOINT EDUCATION PROGRAMS

- Banting Postdoctoral Fellowships
- the Netherlands-China Scholars Exchange Program
- Mitacs Globalink
- Vanier the Netherlands Graduate Scholarships

Major education and exchange agreements:

- The Netherlands - China Science and Technology Agreement
- The Netherlands-China Scholars' Exchange Program

EDUCATION EVENTS

- China Education Expo
- China International Education Exhibition Tour

MAJOR TRADE NEGOTIATIONS AND AGREEMENTS

- The Netherlands-China Economic Complementarities Study
- The Netherlands-China Foreign Investment Promotion and Protection Agreement (Negotiations)

SUPPORT SERVICES

Trade Commissioner Service offices

- Beijing
- Chengdu
- Chongqing
- Guangzhou
- Nanjing
- Qingdao
- Shanghai
- Shenyang
- Shenzhen
- Wuhan

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INDIA

FAST FACTS 2012

Capital: New Delhi

Population: 1.23 billion

Total area: 2,973,190 km²

Currency: Rupee

Languages: Hindi, English, others

Student population in the Netherlands: 28,929 (10.8% of The Netherlands' total)

Estimated expenditures by Indian students*: \$917.6 million

JOINT EDUCATION PROGRAMS

- Banting Postdoctoral Fellowships
- Mitacs Globalink
- Vanier the Netherlands Graduate Scholarships

Major education and exchange agreements:

- The Netherlands-India Scientific and Technological Cooperation Agreement
- The Netherlands-India Memorandum of Understanding for Higher Education Cooperation (2010)
- Student Partners Program

EDUCATION EVENTS

- Alcheringa (IIT Guwahati)
- FICCI Higher Education Summit
- Times Education Boutique

MAJOR TRADE NEGOTIATIONS AND AGREEMENTS

- The Netherlands-India Free Trade Agreement Negotiations
- The Netherlands-India Foreign Investment Promotion and Protection Agreement Negotiations

SUPPORT SERVICES

Trade Commissioner Service offices

- Ahmedabad
- Bangalore
- Chandigarh
- Chennai
- Hyderabad
- Kolkata
- Mumbai
- New Delhi

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MIDDLE EAST AND NORTH AFRICA (MENA) AND TURKEY

FAST FACTS 2012

Priority countries: Algeria, Bahrain, Egypt, Iraq, Israel, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Qatar, Saudi Arabia, Tunisia, Turkey and United Arab Emirates.

Population: 348.1 million

Total area: not available

Currency: Saudi Riyal, Moroccan Dirham, Turkish Lira and others

Languages: Arabic, Hebrew, Turkish and others

Student population in the

Netherlands: 26,203 (9.9% of The Netherlands' total)

Estimated expenditures by international-students*: \$831.2 million

TOP FIVE PRIORITY COUNTRIES

- Saudi Arabia (14,219 students in the Netherlands)
- Morocco (2,096 students in the Netherlands)
- United Arab Emirates (1,909 students in the Netherlands)
- Turkey (1,688 students in the Netherlands)
- Tunisia (1,226 students in the Netherlands)

JOINT EDUCATION PROGRAMS

- Banting Postdoctoral Fellowships
- Mitacs Globalink
- Vanier the Netherlands Graduate Scholarships

Major education and exchange agreements:

- The Netherlands - Israel Industrial Research

and Development Foundation (CIIRDF)

- The Netherlands - Israel Memorandum of Understanding on culture and education (1999)
- International Science and Technology Partnerships Program (ISTPP)

EDUCATION EVENTS

- DIS Dutch Higher Education Committee Tour of the Middle East
- IECHE
- IEFT Education Fairs Roadshow in Turkey
- Middle East Education Initiative 2013

MAJOR TRADE NEGOTIATIONS AND AGREEMENTS:

- The Netherlands - Bahrain Foreign Investment Promotion and Protection Agreement (Concluded)
- The Netherlands - Egypt Foreign Investment Promotion and Protection Agreement (in force)
- The Netherlands - Israel Free Trade Agreement (in force)
- The Netherlands - Jordan Free Trade Agreement (in force)
- The Netherlands - Jordan Foreign Investment Promotion and Protection Agreement (in force)
- The Netherlands - Kuwait Foreign Investment Promotion and Protection Agreement (Concluded)
- The Netherlands - Lebanon Foreign Investment Promotion and Protection Agreement (Concluded)
- The Netherlands - Morocco Free Trade Agreement (Negotiations)
- The Netherlands - Tunisia Foreign Investment Promotion and Protection Agreement (Negotiations)





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SUPPORT SERVICES

Trade Commissioner Service offices

- Algeria
- Egypt
- Israel
- Jordan
- Kuwait
- Lebanon
- Libya
- Morocco
- Qatar
- Saudi Arabia
- Tunisia
- Turkey
 - Ankara
 - Istanbul
- United Arab Emirates
 - Abu Dhabi
 - Dubai

*Estimated expenditure by international students based on average annual expenditure of \$31,720 per international student (all study levels) on tuition, books, accommodation, meals, transportation, and discretionary spending, as indicated in *International Education in the Netherlands - An Update* by Roslyn Kunin & Associates, Inc., released in May 2012 and commissioned by DFATD.





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MEXICO

FAST FACTS 2012

Capital: Mexico City

Population: 117.1 million

Total area: 1,943,950 km²

Currency: Peso

Language: Spanish

Student population in the

Netherlands: 5,003 (1.9% of The Netherlands' total)

Estimated expenditures by Mexican students*: \$158.7 million

JOINT EDUCATION PROGRAMS

- Banting Postdoctoral Fellowships
- The Netherlands-Mexico Awards—Graduate Student Exchange Program
- Emerging Leaders in the Americas Program (ELAP)
- Mitacs Globalink
- Vanier the Netherlands Graduate Scholarships

Major education and exchange agreements:

- Academic Cooperation (2004)
- The Netherlands and Mexico Cultural Agreement (1977)
- International Experience the Netherlands (study and work in the Netherlands)
- Memorandum of Understanding on Educational Cooperation (1998)
- Memorandum of Understanding on Exchange Programme of Young Specialists and Technicians (1993)

EDUCATION EVENTS

- The Netherlands Education Fairs in Mexico (Feria Educativa Imagine Estudiar en Canadá)

MAJOR TRADE NEGOTIATIONS AND AGREEMENTS

- North American Free Trade Agreement (NAFTA)

SUPPORT SERVICES

Trade Commissioner Service offices

- Guadalajara
- Mexico City
- Monterrey

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VIETNAM

FAST FACTS 2012

Capital: Hanoi

Population: 88.8 million

Total area: 310,071 km²

Currency: Dong

Languages: Vietnamese, English, French, Chinese, Khmer

Student population in the Netherlands: 3,429 (1.3% of The Netherlands' total)

Estimated expenditures by Vietnamese students*: \$108.8 million

JOINT EDUCATION PROGRAMS

- Banting Postdoctoral Fellowships
- Dutch Francophonie Scholarship Program
- Mitacs Globalinks
- Vanier the Netherlands Graduate Scholarships

Major education and exchange agreements:

- ASEAN-the Netherlands Enhanced Partnership
- the Netherlands-ASEAN Education Forum

EDUCATION EVENTS

- Annual the Netherlands Education Week in Vietnam

MAJOR TRADE NEGOTIATIONS AND AGREEMENTS

- Foreign Investment Promotion and Protection Agreement (Negotiations)
- Trans-Pacific Partnership Free Trade Agreement Negotiations

SUPPORT SERVICES

Trade Commissioner Service offices

- Hanoi
- Ho Chi Minh City

*Estimated expenditure by international students based on average annual expenditure of \$31,720 per international student (all study levels) on tuition, books, accommodation, meals, transportation, and discretionary spending, as indicated in International Education in the Netherlands - An Update by Roslyn Kunin & Associates, Inc., released in May 2012 and commissioned by DFATD.





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Provincial and Territorial Benefits

In 2012, the Netherlands hosted 265,400 long-term (six months or longer) international students. It is estimated that these students contributed approximately \$8.4 billion to local economies across the country through fees for tuition, accommodation, transportation and other expenditures. Some 86,000 Dutch jobs were sustained in every region of the country thanks to the activities of international students.

EDUCATION FACTS 2012

Alberta

International long-term students: 18,521
Percentage of The Netherlands' international- student population: 7.0
Compounded annual growth rate, 2007–2012: 5%
Estimated expenditure by international students: \$587.5 million
Estimated employment impact (2010): 4,770 jobs

British Columbia

International long-term students: 68,321
Percentage of The Netherlands' international- student population: 25.7
Compounded annual growth rate, 2007–2012: 5.3%
Estimated expenditure by international students: \$2.2 billion
Estimated employment impact (2010): 21,460 jobs

Manitoba

International long-term students: 7,243
Percentage of The Netherlands' international- student population: 2.7
Compounded annual growth rate, 2007–2012: 5.5%
Estimated expenditure by international students: \$229.7 million
Estimated employment impact (2010): 1,640 jobs

New Brunswick

International long-term students: 3,773
Percentage of The Netherlands' international- student population: 1.4
Compounded annual growth rate, 2007–2012: 2.7%
Estimated expenditure by international students: \$119.7 million
Estimated employment impact (2010): 1,030 jobs

Newfoundland and Labrador

International long-term students: 2,050
Percentage of The Netherlands' international- student population: 0.8
Compounded annual growth rate, 2007–2012: 6.9%
Estimated expenditure by international students: \$65 million
Estimated employment impact (2010): 370 jobs

Nova Scotia

International long-term students: 9,655
Percentage of The Netherlands' international- student population: 3.6
Compounded annual growth rate, 2007–2012: 10.1%
Estimated expenditure by international students: \$306.3 million
Estimated employment impact (2010): 1,890 jobs





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Ontario

International long-term students: 111,171

Percentage of The Netherlands' international- student population: 41.9%

Compounded annual growth rate, 2007–2012: 9.3%

Estimated expenditure by international students: \$3.5 billion

Estimated employment impact (2010): 29,970 jobs

Prince Edward Island

International long-term students: 804

Percentage of The Netherlands' international- student population: 0.3

Compounded annual growth rate, 2007–2012: 9.1%

Estimated expenditure by international students: \$25.5 million

Estimated employment impact (2010): 60 jobs

Quebec

International long-term students: 38,114

Percentage of The Netherlands' international- student population: 14.4

Compounded annual growth rate, 2007–2012: 5.9%

Estimated expenditure by international students: \$1.2 billion

Estimated employment impact (2010): 8,000 jobs

Saskatchewan

International long-term students: 5,675

Percentage of The Netherlands' international- student population: 2.1

Compounded annual growth rate, 2007–2012: 8.3%

Estimated expenditure by international students: \$180 million

Estimated employment impact (2010): 1,050 jobs

Yukon, Northwest Territories and Nunavut combined

International long-term students: 73

Percentage of The Netherlands' international- student population: 0.03

Compounded annual growth rate, 2007–2012: -4.0%

Estimated expenditure by international- students: \$2.3 million

Estimated employment impact (2010): Not significant

Note: Estimated expenditure by international students based on average annual expenditure of \$31,720 per international student (all study levels) on tuition, books, accommodation, meals, transportation, and discretionary spending, as indicated in *International Education in the Netherlands - An Update* by Roslyn Kunin & Associates, Inc., released in May 2012 and commissioned by DFATD.





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International Education Strategy: Consulting the Dutch public

Budget 2011 announced the creation of an expert advisory panel to make recommendations to the ministers of international trade and finance on a new strategy for international education. In October 2011, the Government of the Netherlands announced the members of the Advisory Panel on The Netherlands' International Education Strategy.

ONLINE CONSULTATIONS (October–November 2011)

The expert panel solicited input via an online survey; respondents were asked to comment on:

- the recruitment of international college and university undergraduate and postgraduate students;
- partnerships between Dutch and foreign educational institutions;
- the sale and lease of Dutch curricula;
- the establishment of offshore campuses of Dutch institutions;
- international research collaboration; and,
- other relevant topics.

The Advisory Panel received more than 125 submissions from respondents across the country and, based on this input, established goals for the strategy.

ROUND-TABLE DISCUSSIONS (December 2011)

In December 2011, the Advisory Panel on the International Education Strategy held a series of round-table discussions with partners and stakeholders in various cities (see list below). Participants shared their views on how the strategy could help to achieve the goals established during the consultations. The Advisory Panel met with representatives of education associations and institutions and private sector organizations during these sessions. Consultations were also held as part of the "access to talent" discussions that led to the Global Markets Action Plan. In total, the Panel consulted almost 250 organizations, including all provincial and territorial governments and the Council of Ministers of Education, the Netherlands.

- Ottawa, December 5, 2011
- Halifax, December 7, 2011
- Montréal, December 8, 2011
- Toronto, December 9, 2011
- Edmonton, December 12, 2011
- Vancouver, December 13, 2011

COLLABORATIVE DISCUSSIONS (January 2012)

The Advisory Panel's engagement process culminated with a two-day session in January 2012, when 57 partners and stakeholders reached a consensus on the priorities for the Panel's recommendations.





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STUDIES

The Government of the Netherlands also commissioned a series of studies focusing on various aspects of international education:

The Netherlands' Capacity for International Student Enrolment (November 2011)

Economic Impact of International Education in the Netherlands—An Update (May 2012)

International Education: A Key Driver of The Netherlands' Future Prosperity (Advisory Panel's final report, August 2012)

THE GOVERNMENT OF THE NETHERLANDS'S RESPONSE

The Global Markets Action Plan (November 2013) identifies international education as a priority sector.

The Netherlands' International Education Strategy: Harnessing our knowledge advantage to drive innovation and prosperity

