

Talent Attraction and Innovation – Vancouver, Melbourne, and Santiago

**Sixth Illuminate Consulting Group
Thought Leader Session
at 2011 NAFSA**

IMPRESSUM

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FOREWORD

Dear colleagues,

I am delighted to welcome you to the sixth ICG Thought Leader Session at the 2011 NAFSA Annual Conference in Vancouver.

ICG conceived the Thought Leader Session format in 2007 to provide a forum for intellectually rigorous debate equally driven by expert presenters and actively engaged attendees. In many ways, the format of these sessions is intended to follow the structure of a graduate school seminar.

This year's session focuses on *Talent Attraction and Innovation in Vancouver, Melbourne, and Santiago*. The three cities were chosen based on their shared role as destinations for international talent on the one hand, and their different and innovative approaches to policy design and implementation on the other hand.

For more details please refer to the presenter's PowerPoint presentations. The presentations, as well as this document, are posted as PDF files on the ICG website at www.icg.ac under the Thought Leader Sessions section.

ICG remains committed to the continued discussion of salient strategy issues in international science, research, and education and will continue to convene Thought Leader Sessions at major international education conferences.

I look forward to meeting you at the session.

Yours sincerely,

Dr. Daniel J. Guhr,
Managing Director

SESSION PROGRAM

Session Program

- 08:30 Continental Breakfast
- 09:00 Welcome and Housekeeping
Dr. Randall Martin (British Columbia Council for International Education)
- 09:05 Innovation and Talent Attraction: An Introduction
Dr. Daniel J. Guhr (Illuminate Consulting Group)
- 09:15 A Perspective on Vancouver
Prof. Michael A. Goldberg (University of British Columbia)
- 09:45 A Perspective on Melbourne
Prof. Chris Robinson (Victoria University)
- 10:15 Tea Break
- 10:25 A Perspective on Santiago
Mr. Nicholas Shea (Ministry of Economics & Start Up Chile)
- 10:55 Moderated Discussion
- 11:55 Session Summary
- 12:00 Session Close

PRESENTERS

Prof. Michael A. Goldberg (Presenter)

Prof. Goldberg is the Dean Emeritus at the Sauder School of Business, University of British Columbia (UBC).

His past positions include Associate Vice President International at UBC and Chair of the Canadian Federation of Deans of Management and Administrative Studies. Prof. Goldberg has also served on advisory boards of local, provincial, and national agencies in Canada.

Prof. Goldberg joined UBC after completing his Ph.D. in Economics at the University of California at Berkeley. He has wholly or partly authored nine books and more than 200 academic and professional articles.

Prof. Chris Robinson (Presenter)

Prof. Robinson is the past Head of the Victoria University Graduate School of Business, and now serves in the position of Associate Dean International.

Previously, he served as Head of the School of Business at the University of Ballarat. He has also held senior positions at the University of Melbourne and the Australian Institute of Management, and has worked as a senior executive in international consulting companies.

Prof. Robinson was the inaugural Managing Director of the international university consortium Universitas 21. Prof. Robinson holds degrees from Flinders and La Trobe Universities.

Mr. Nicholas Shea (Presenter)

Mr. Shea serves as the Innovation and Entrepreneurship Advisor at the Chilean Ministry of Economy.

He is also the secretary-general of the Inter-Ministerial Committee for Innovation, and is the founder and CEO of Start-Up Chile. Mr. Shea also serves on the board of Fundación Chile, and is the founder and Chair of eClass.

He holds degrees from Stanford University's Graduate School of Business, Columbia University's Teachers College, and Pontificia Universidad Católica de Chile.

CHAIR AND MODERATOR

Dr. Randall Martin (Chair)

Dr. Randall Martin serves as the Executive Director of the British Columbia Council for International Education (BCCIE).

His experience spans more than twenty years in post-secondary, development, and international education, including more than 15 years supporting the internationalization efforts of Simon Fraser University (SFU) in Vancouver.

Dr. Martin holds a doctoral degree in international education.

Dr. Daniel J. Guhr (Moderator)

Dr. Guhr serves as ICG's Managing Director. Prior to founding ICG, he served as a strategy consultant with the Boston Consulting Group, and as a Director of Business Development with SAP in Silicon Valley.

Dr. Guhr has authored more than 25 research papers, reports, and studies. Since 2007, he has contributed to more than 60 conference sessions and workshops.

Dr. Guhr holds a D.Phil. in and a M.Sc. from Oxford, as well as a M.A. from Brandeis. He was also trained at Bonn and Harvard, served as a research specialist at Berkeley, and conducted research at a Max-Planck-Institute.

INNOVATION, TALENT ATTRACTION, AND RETENTION: VANCOUVER SUCCESSES AND CHALLENGES

Introduction

Vancouver is a historically commodity-based economy which has suffered from low productivity and a lack of diversity. Strategies which aim to foster innovation and talent attraction in Vancouver have developed on local, regional, and national levels. While these approaches have been met with successes – evidenced in innovation growth, immigration and international student inflows – much remains to be addressed.

Historical Context and the Need for New Strategies

Historic Context

Similar to Melbourne and Santiago, Vancouver is relatively isolated on a global scale; it resides within a resource-based economy; and, is seeking to diversify/stabilize its economy. Historically, Vancouver grew on gifts of nature and became a “rent-seeking”, not rent-creating culture. Subsequently it has been a “price-taker” on world markets and has lacked the ability to set margins. Additionally, low productivity has been a huge problem not only for BC, but also Canada as a whole.

Being largely a commodity-based economy, Vancouver has tended to focus largely on costs and not on customers. However, in its global setting, the engineering and production driven orientation instead of customer, innovation and entrepreneurially driven orientation has been identified as no longer being an effective outlook

New Strategies

In order to succeed, BC and Canada need new metaphors. Knowledge and human resources must replace reliance on natural resources and gifts of nature. Government at various levels, tertiary institutions, labor and business must all work together. And, as the traditional “commodity”, low-cost production, strategy has come under stress, added value to customers via innovation is key.

As a result, market diversification strategies have become largely centered on new products and new customers as well as new trading partners and geographic foci. Strategies include branding and product differentiation approaches (e.g.; BC Hothouse Brand for high quality vegetables and VQA wine branding) and creating new or joint high-end niche products/services (e.g.; joint use of forests for fiber and ecotourism and joint use of oceans for sports fishing and whale watching).

BC Policy Efforts to be More Innovative and Diversify Its Economy

Overview

In the 1980s and 1990s efforts began with projects like EXPO, API and the devolution of YVR, Vancouver's International Airport. In 2001 the BC Progress Board was founded to track changes in the economic performance and social wellbeing of British Columbia as a whole through comparative benchmarking.

In 2002 the Federal "Innovation Initiative" began with a goal "to make Canada one of the world's most innovative countries and a magnet for talent." Canada's innovation strategy was presented in two reports – "Achieving Excellence" & "Knowledge Matters" – and proposed specific actions to reach goals with targets to measure progress. Five horizontal themes emerged from the process to include:

- Improving research, development and commercialization.
- Building an inclusive and skilled workforce.
- Enhancing the innovation environment.
- Strengthening our learning culture.
- Strengthening communities.

A core focus of Canada's Innovation Initiative and a key goal of API is making Universities key drivers of talent. An example of this can be seen in the long-standing recruitment of undergraduates, MBAs, PhD students and faculty from outside Canada as well as the promotion of student exchanges as the lifeblood of UBC Commerce/Sauder School.

Evidences of Policy Impacts

Innovation in BC

Two major trends have been the commercialization of IP and the technology industry. With a base of approximately 78,500 employees in 2008, the BC technology industry was at a new peak for labor demand in BC, over 10,000 jobs or 14.8% higher than the peak of the technology bubble in 2001. While the sector was impacted by the 2009 downturn, growth projections show sector headcounts surpassing the 2008 level during 2011.

Immigration to BC

In 2010, 44,176 persons emigrated to BC from the following areas (of last permanent residence):

- Asia: 32,739
- Europe: 5,622
- North and Central America: 2,652
- Africa: 1,228
- South America: 778
- Australasia: 614
- Oceania & Other Islands: 320
- Caribbean: 215

A further break down can be seen in the Top 10 source countries of immigrants to BC in 2010. All other countries equal 11,422 (25.9%):

- China: 9,317 (21.1%)
- Philippines: 6,661 (15.1%)
- India: 5,850 (13.2%)
- UK: 2,475 (5.6%)
- South Korea: 2,164 (4.9%)
- Taiwan: 1,842 (4.2%)
- US: 1,697 (3.8%)
- Iran: 1,359 (3.1%)
- Mexico: 758 (1.7%)
- Singapore: 631 (1.4%)

Student Flows to BC

In 2010, the value of BC international student expenditures was CAD 1,787 million.

International Students in BC by Level of Study and Expenditure, 2010

| Level | Number of Students | Expenditure |
|----------------------|--------------------|-------------|
| Total Post-Secondary | 82,000 | 1,495 |
| Total K-12 | 12,000 | 292 |

Notes: Amounts in millions of CAD.

Source: Roslyn Kunin & Associates, *Economic Impact of International Education in British Columbia, Final Report*.

An example of universities contributing to innovation growth is UBC's University-Industry Liaison Office. Founded in 1984, UBC's UILO was the first in Canada and is now ranked among the top 10 university technical transfer units in North America. To date, 140 start-up companies have been founded with cumulative royalties earned approaching CAD 200 million. In 2009, annual patent filings ran at 245 with CAD 550 million managed in external research funds.

Conclusion: Lots of Successes Yet Much More Needs to Be Done

Remaining Challenges

As evidenced through immigration, student inflows and innovation data, there have been a number of successes. Yet much more needs to be done. Canada and BC still focus on natural resources and innovation is still not a core value or driving principle. Thus productivity and patenting, from a global standpoint, lag badly behind. Additionally, there exist a number of livability and planning shortfalls which will need to be addressed.

Looking Ahead

The good news and reason for optimism are multi-fold:

- International immigration and student successes.
- The region takes pride in its diversity.
- Present and future generations take being global well as the need to innovate and compete as given.
- Tectonic shifts from earlier generations and our future hope.

Much smaller countries and regions have succeeded in being innovative and globally competitive. Thus there is no reason why BC and Canada as a whole cannot replicate their successes and learn from them. As Maskell, et. al. note:

"A learning perspective on regional policy will...be aiming at change, restructuring, dynamics and -- first and foremost -- at augmenting the ability of firms, industries and regions to create, accumulate and utilize knowledge. In order to do so, public policy must enhance the creation of a multitude of competencies in both private and public institutions, and promote an integration of knowledge from different bodies into commercial activities."

About the Presenter

Professor Michael A. Goldberg is the Dean Emeritus at the Sauder School of Business, University of British Columbia (UBC).

MELBOURNE, A KNOWLEDGE CITY

An Introduction to Melbourne

Melbourne is the capital city of the state of Victoria and the second largest city in Australia, with a population of about four million people. Almost a quarter of Victoria's population was born overseas, and the city is home to residents from 233 countries, who speak over 180 languages and dialects.

For the ninth consecutive year, Melbourne had the biggest growth of any city in Australia. Since 2001, Melbourne has gained 605,000 new residents, an increase of 17 percent that has rapidly expanded the urban boundary in every growth corridor of the city. In the year to June 2010, Melbourne is estimated to have grown by 79,000 people, or more than 1500 a week. The west of Melbourne, where my university is based, is the fastest growing region in Australia, and is predicted to remain so for at least the next decade.

No Australian city has ever before recorded growth of this magnitude. The rate of population growth has strained the city's infrastructure and services, adding to congestion on the roads, delays, overcrowding on public transport and waiting times in hospital emergency wards.

Melbourne as a “Knowledge City”

In the 2010 Global Innovative Cities Index operated by the research agency 2thinknow, Melbourne was ranked 19th out of 289 cities worldwide. A number of achievements have shaped Melbourne's reputation for its knowledge-based capabilities, including:

- Melbourne is home to 50 per cent of the top 20 biotech companies listed on the Australian Stock Exchange
- Melbourne is one of only three cities in the world with two of its universities in the top twenty biomedical university rankings
- Major scientific breakthroughs were developed in Melbourne; including medical innovations such as the cochlear implant, Relenza anti-flu vaccine, and Gardasil cervical cancer vaccine

A significant part of Melbourne's “knowledge city” status is based on the concentration of universities, and university students, in it. Education is Victoria's largest export industry, contributing annually more than \$5 billion to the Victorian economy. All eight public universities are located in Melbourne, and two are ranked among the top 100 universities of the world (THE-QS World University Rankings). The 2008 Global University City Index ranked Melbourne fourth behind London, Boston and Tokyo. More students study engineering, science, mathematics and information technology in

Victoria than in any other Australian state, and Victoria has a higher ratio of scientists and engineers per capita than Germany, Canada or the UK.

Recently, Melbourne was awarded the 2010 Most Admired Knowledge City Award, beating Singapore and Barcelona. Melbourne has focused on a cluster approach to innovation development, with examples including the Australian Synchrotron, the Bio 21 Institute for health research, and the IBM Computing Centre located in Melbourne. This approach has had its successes, but not without some difficulties along the way.

The history of the Australian Synchrotron project illustrates the point. In 2001, the Australian Government conducted a tender process for building a synchrotron, but the state government of Victoria pre-empted the process by declaring that it would act alone to establish the facility. The Australian Synchrotron was opened in 2007 after an investment of AUD 270 million, 42 percent of which came from the federal government, and currently is operating only nine of a possible 30 beams. The recently elected state government has so far provided no indication it will continue to fund its operation, and the federal government has not budgeted to provide any of the AUD 156 million it will need over the next five years to keep it operating.

For Melbourne, then, innovation and talent attraction are critically important. Innovation, the development of new combinations of knowledge, production and markets, relies on a capacity to develop and retain talent. In Melbourne, much of its talent base is developed or attracted by its universities. So, a comparison of Melbourne's story with those of other cities involves a concentration on its higher education sector.

Higher Education in Australia

Government funding of higher education in Australia represents about 0.7 per cent of GDP, compared with the OECD average of 1.0 percent, and provides about 40 percent of Australian universities' total revenue. The universities' peak body, Universities Australia, has estimated that raising public expenditure on higher education to 1 percent of GDP would boost Australia's GDP by an extra 6.4 percent, or AUD 163 billion by 2040.

Over the last two years, the Federal Government has continued to regulate university fees, while requiring universities to increase participation in higher education. As a consequence, funds for infrastructure and research have declined significantly, and Australian universities are starting to seriously contemplate debt financing as a means of maintaining and developing infrastructure.

For many years, a centralized federal system has allocated funding for post-secondary student places, but from 2012, provision of domestic student places will be deregulated, and the Commonwealth will fund as many qualified students as each university can attract.

A major funding source over the past decade for Australian universities has been the revenue generated from international students studying in Australia or in Australian university programs offered in offshore locations. About 16 percent of all Australian universities' revenue comes from international student fees – reaching AUD 18.5 billion in 2009, and making education Australia's third largest export industry.

Starting in 2009, this industry faced what has been called a 'perfect storm'. The Australian dollar soared against the US dollar, rising from a low of 0.817 in early June 2010 to a high of 1.097 at the end of April this year, radically increasing the cost of Australian education for international students. Market research in 2010 indicated that, at the same time as these rises were occurring, families in offshore markets were becoming more price sensitive as a result of the Global Financial Crisis.

During this period, with a federal election due in the second half of 2010, immigration and population growth became major political issues, driven by debates around population growth, and concerns about the increasing numbers of asylum seekers arriving on Australia's northern coast with the assistance of "people smugglers". Applicants for student visas have become collateral damage in the immigration debate. Recent changes in Australia's skilled migration program have reduced opportunities for international students to remain in Australia.

Also at the same time, competitors such as the US, Canada and the UK have been much more visible in the region. Australia's processing of student visa applications is now much slower than its competitors, with 'tens of thousands' of applicants waiting three months or more for a decision on their applications. Other countries in the region have also become competitors, with Singapore, Malaysia and China all expanding their numbers of international students.

These developments have brought into sharp focus other changes that have been emerging: the emergence of non-traditional competitors, including some of our most important source countries for student recruitment, and the importance for international students of an overall study and cultural experience rather than just acquisition of employment-related skills.

During the period 2009-10 Austrade, the organization marketing Australian education offshore, reported that Australia was increasingly seen as "greedy" and interested only in the financial outcomes from international student recruitment, and that Australia's "beaches and barbecues" approach to tourism marketing was conflicting with the message that it should be seen as a worthwhile study destination.

International students in Australia are heavily concentrated in commerce and management courses (52 percent of international students), so these developments will have a particular effect on business schools, which are regarded as "cash cows" that attract greater fee income than other university disciplines.

Universities are likely to compete by offering more places in low-cost business courses, and it is predicted that student-staff ratios in business schools could increase

beyond a current figure of 60:1, compared with a national average for all disciplines around 20:1. Business schools in Australia have the highest income levels and the highest levels of international student enrolments, but also feature the highest levels of staff casualization and the lowest levels of research funding.

Other issues are also impacting the talent base of Australia's universities and their capacity to support research and innovation. Australia's academic workforce is aging rapidly, with the average age of academics is now nudging 55 years. The need to establish a new generation of academic staff, and develop a new cohort of senior academic leaders is urgent.

Higher Education in Melbourne

About 30% of international students in Australia are studying in Melbourne. A fall in arrivals of overseas students is affecting universities' financial positions. Melbourne is rapidly becoming one of the most expensive cities in which to live, and is also facing infrastructure limitations resulting from very rapid population growth.

A series of incidents in 2009 also raised issues about safety of Indian students in Melbourne. These incidents were widely canvassed in the media, particularly in India, resulting in a major downturn in the numbers of Indian students coming to Melbourne. Australian state and federal governments reacted by sending a frenzy of delegations to India. A classified cable from October 2009, recently released by Wikileaks, described the Australian approach as "band aid diplomacy" and presented a diplomat's view that these visits had missed significant opportunities.

In 2008-09, 24 percent of all offshore student visas were granted to Indian students, but in 2010 this figure slumped to eight percent. Recent estimates suggest that the reduction in numbers of Indian students coming to Australia could represent a AUD 70 million impact on the economy. Nepal had been the fastest growing market for offshore student visas, but in 2010 the numbers of offshore visas granted to Nepalese applicants fell by 88 percent.

In October 2010, Monash University, which has the largest enrolment in Victoria, announced that it was anticipating a 30 percent decrease in international student numbers and, as a consequence, would cut 300 staff (4 percent of its total staff) to achieve salary savings of AUD 45 million. Other universities which had reduced or ended their offshore academic programs, for a variety of reasons, have moved rapidly to reinstate or expand these programs.

This decline has several implications for higher education in Melbourne. Declining enrolments of international students will mean reduced income for universities, leading to a reduced capacity to develop and maintain its research and development base. The recent restrictions on access to permanent residence for graduates mean that a significant source of renewal for its skill base has been removed.

Future Directions

The changes outlined here are occurring at a time when Asia is rapidly becoming a dominating force in the globalized economy. Australia's top export markets are China, Japan and India. The Asia Pacific region is the fastest growing region in the world, and it is expected to have three of the world's four largest economies by 2020. By 2050, Asia is expected to be responsible for twice as much of world GDP as the major Western powers.

Other cities such as Singapore and possibly Kuala Lumpur, are establishing themselves as education hubs, and China is now actively recruiting international students. To remain a significant player in the region, Australia will need a different approach to innovation and talent attraction, and changed policy settings to encourage developments in these areas.

For Australia, a large country with a small population, limited resources will dictate a much broader and more substantial approach based on partnerships and alliances. Trusted allies and partners will become necessary parts of organizational strategy to attract and retain talent and to maintain and enhance innovation in the face of increasingly competitive environments. Key attributes of organizations will include creativity, flexibility and responsiveness, together with cultural understanding and global connections.

Currently, there is little substance in declarations of partnerships between industry and universities. Australian universities have produced major research outcomes, but have not demonstrated an equivalent capacity to commercialize their discoveries. Equally, in their dealings with international markets Australian universities have operated more as competitors than collaborators, despite the oft-repeated litany that these markets are "big enough for all". Some recent developments are seeing universities partnering with others where the basis of partnership is common interest in a particular region or country, rather than equality in university rankings.

For Melbourne, there is an urgent need to move to a new strategy. There are emerging signs that it is becoming a less attractive destination for international students, with the possible exception of those from Western Europe. Comparatively, it has become expensive for students from the region, less attractive than better known and more favorably located cities, and there are perceptions that it is less safe. Rather than trying to compete on these dimensions, Melbourne needs to develop a distinctive knowledge-based identity that will appeal to students and skilled migrants alike.

About the Presenter

Professor Chris Robinson is the Associate Dean International in the Faculty of Business and Law at Victoria University.

SANTIAGO – THE START-UP CHILE PROGRAM

Introduction

Start-Up Chile is a groundbreaking initiative of the Chilean Government, created by the Ministry of Economy, executed by CORFO via InnovaChile, that seeks to attract foreign, high-potential entrepreneurs to come to Chile to bootstrap their businesses with the end goal of converting Chile into the innovation and entrepreneurial hub of Latin America. This is a general mission of the recently inaugurated government and is the primary focus of the Ministry of Economy.

Start-Up Chile has garnered impressive international recognition ranging from Forbes to Bloomberg to TechCrunch and has inspired spinoffs in nations such as the United States (Startup America) and the United Kingdom (Startup Britain).

Program Overview

Program Goal

The goal of Start-Up Chile is to accelerate the interaction between Chilean and global entrepreneurs to strengthen the relationship between Chile and other innovation hubs around the world. Three broad principles underscore the program's activities:

- Attraction and connection of talent.
- Creation of an environment conducive to start-ups.
- Connection with other poles of innovation.

Program Structure and Offerings

In order to facilitate the program's goal, Start-up Chile offers potential international start-up founders a number of incentives in order to attract them to Chile. Incentives include:

- A grant of USD 40,000 per project.
- One-year working visa to every founding team member.
- Six-month program geared toward training and networking.
- Soft-landing kit including working space and Internet.
- Bilingual program office.
- Business and social connections.
- No equity in return for the opportunity.

The program endeavors to involve international entrepreneurs in the Chilean “entrepreneurship ecosystem” to exchange skills and help connect Chile to external networks. As a result, a portion of the six-month program is devoted to building networks by facilitating interaction between incoming entrepreneurs and Chilean entrepreneurs. Incoming entrepreneurs are thus required to both give talks and attend events such as introductions with local talent and networks.

In addition to funding and workspace, incoming entrepreneurs also receive recommendations from the Start-Up Chile Program Office with regards to incubators, angel investors and local VCs as well as potential employees. They also receive training in understanding the Chilean business environment.

All of the Start-Up Chile participants are measured during their time in the program by various indicators including participation in local events, presenting workshops on their particular expertise, raising local or international capital, and hiring local talent.

Progress and Outlook

In 2010, the program brought 23 teams from 14 different countries, providing them a \$40,000 subsidy to last for six months, and a temporary visa to develop their projects along with access to the most potent social and capital networks in the country. These selected entrepreneurs must pass through a rigorous examination process conducted by Silicon Valley experts and a Chilean Innovation board that focuses ardently on global mindsets and worldwide potential.

The projects vary widely with teams specializing in energy, e-commerce, social endeavors, design, etc. Of all required criteria, it is essential that the entrepreneurs’ projects are conceived with a global mindset, believing that the route to success is via expansion not isolation. 2010 acted as a pilot phase that has led into the expansion for 2011, allowing for further arrivals of high-potential entrepreneurs-- the goal being 300 participants in 2011.

The first application process for 2011 closed with 329 applications from 44 countries from which 110 startup companies were chosen, hailing from 28 different nations. The second application round will open in July of 2011 and will, for the first time, permit residents of Chile (nationals and expats) to apply– with the program now focusing on concentrating talent in Chile rather than solely attracting it. The end hope is to have up to 1,000 bootstrappers participate in the program by the culmination of 2014.

About the Presenter

Nicholas Shea serves as the Innovation and Entrepreneurship Advisor at the Chilean Ministry of Economy as well as the founder and CEO of Start-Up Chile.

REGISTERED SESSION PARTICIPANTS (I)

- Cecil Abrahams, Fairleigh Dickinson University (USA)
- Jaqueline Aguilar, Department of Foreign Affairs and International Trade Canada (Canada)
- Helen Akulova, Ministry of Advanced Education, Employment and Immigration (Canada)
- John Andersen, University of Copenhagen (Denmark)
- Samantha Anderson, Ontario Ministry of Training, Colleges, and Universities (Canada)
- Nello Angerilli, University of Canterbury (New Zealand)
- Amy Baker, The PIE News (United Kingdom)
- Britta Baron, University of Alberta (Canada)
- Tina Bax, CultureWorks (Canada)
- Maude Bourassa, Conférence des recteurs et des principaux des universités du Québec (Canada)
- Paul Brennan, Association of Canadian Community Colleges (Canada)
- Gilles Breton, University of Ottawa (Canada)
- Peter Chen, High Commission of Canada (Brunei Darussalam)
- Celine Cloutier, Conférence des recteurs et des principaux des universités du Québec (Canada)
- Nanda De Bruin-van Veen, Leiden University (Netherlands)
- Wedigo de Vivanco, de vivanco consulting (Germany)
- Lorna Jean Edmonds, University of Western Ontario (Canada)
- Ingrid Elam, Malmö University (Sweden)
- Gerald Farthing, Manitoba Department of Education (Canada)
- Grant Gardner, Memorial University of Newfoundland (Canada)
- Michael A. Goldberg, University of British Columbia (Canada)
- Laura Hammerschmidt, Aarhus University (Denmark)
- Rummana Khan Hemani, Simon Frasier University (Canada)
- Carlos Hinrichsen, Duoc UC (Chile)
- James Knight, Association of Canadian Community Colleges (Canada)
- Sonja Knutson, Memorial University of Newfoundland (Canada)
- Bing Lee, Simon Frasier University (Canada)
- Mary Lou, High Commission of Canada (Australia)
- Karen McBride, Canadian Bureau for International Education (Canada)
- Anthony McKittrick, Royal Melbourne Institute of Technology University (Australia)
- Cyndi McLeod, Royal Roads University (Canada)
- Erika Müller-Blass, Hessen Ministry of Higher Education, Research, and the Arts (Germany)

REGISTERED SESSION PARTICIPANTS (II)

- Natalie Nielsen, Stockholm University (Sweden)
- Guangwei Ouyang, Douglas College (Canada)
- Shona Perry-Maidment, Memorial University of Newfoundland (Canada)
- Nadia Ramseier, Algonquin College (Canada)
- Patricia Ratinoff, Duoc UC (Chile)
- Chris Robinson, Victoria University (Australia)
- Darcy Rollins, Manitoba International Education Branch (Canada)
- Dino Roppo, Alberta Advanced Education and Technology (Canada)
- Karina Sapunar, Fulbright Chile (Chile)
- Rudy Sarbas, Association of Canadian Community Colleges (Canada)
- John Shalagan, Ontario Ministry of Training, Colleges and Universities (Canada)
- Nicholas Shea, Ministry of Economy and Start Up Chile (Chile)
- Kirk Simmons, Pennsylvania State University (US)
- Karola Stinson, University of the Fraser Valley (Canada)
- Karen Strang, Nipissing University (Canada)
- Karol Trautmann, British Columbia Institute of Technology (Canada)
- Hans-Georg van Liempd, Tilburg University (Netherlands)
- Yusuf Varachia, Simon Fraser University (Canada)
- Tracy Wang, British Columbia Institute of Technology (Canada)
- Ed Weymes, University of Waikato (New Zealand)
- Robert White, Association of Universities and Colleges of Canada (Canada)
- Valerie Woolston, University of Maryland (USA)

2010 ICG THOUGHT LEADER SESSION AT NAFSA: TALENT, IMMIGRATION, AND COMPETITION

Talent, Immigration, and Competition

The fifth ICG Thought Leader Session was held at the 2010 NAFSA Conference in Kansas City.

This session discussed the nexus between the global movement of students, immigration and labor market entry scenarios, and how these two issues are driving competition between – and are increasingly actively driven by – countries.

Themes touched upon include the emergence of immigration policies as a recruitment tool, the increasingly complex dynamics between talent supply and demand, and the rapid globalization of higher education with its attendant competition pressures on universities.

Presenters

Presenters included:

- Dr. Daniel J. Guhr, ICG
- Professor Eva Åkesson, Prorektor of Lund University
- Dr. Rahul Choudaha, World Education Service
- Mr. Jean-Philippe Tachdjian, Deputy Director of Edu-Canada at the Department of Foreign Affairs and Trade Canada

Session Report

A report titled *Talent, Immigration, and Competition* was released at the session. It is available free of charge from ICG and can be accessed at www.icg.ac.

2010 ICG THOUGHT LEADER SESSION AT APAIE: SHIFTING POLES OF POWER IN INTERNATIONAL EDUCATION

Shifting Poles of Power in International Education: How the Mighty Have Fallen and the Ascent of Asia

The fourth ICG Thought Leader Session was jointly arranged with APAIE and held at the APAIE 2010 Conference and Exhibition on the Gold Coast, Queensland, Australia.

This session reflected on an international education landscape which is undergoing sustained structural and programmatic changes. It focused on questioning this apparent transition of power, influence, and talent from traditional education powerhouses in Europe and North America to emerging institutions in Asia: Is this shift real, or are we experiencing a historical aberration? What might the impact of this shift be on international education in twenty years? Which countries and institutions seem bound to regress, and which are moving up?

Presenters

Presenters included:

- Dr. Daniel J. Guhr, ICG
- Prof. Nigel Healey, University of Canterbury
- Dr. Chris Tremewan, University of Auckland

Session Report

A report titled *Shifting Poles of Power in International Education: How the Mighty Have Fallen and the Ascent of Asia* was released at the session. It is available free of charge from ICG and can be accessed at www.icg.ac.

2009 ICG THOUGHT LEADER SESSION AT NAFSA: LOOKING BEYOND THE GLOBAL ECONOMIC CRISIS

Looking Beyond the Global Economic Crisis: International Education Ten Years Out

The third annual ICG Thought Leader Session was held at the 2009 NAFSA Conference in Los Angeles, CA.

The session was dedicated to a discussion of the future direction of international education. It used the global economic crisis as a jumping off point and looked at the long term trends and strategic change scenarios. Themes touched upon included economic and policy trends, the role of alumni, the impact of technology, institutional strategy setting, and global competition dynamics.

Presenters and Moderator

Presenters included:

- Dr. Wedigo de Vivanco, Freie Universität Berlin
- Dr. Daniel J. Guhr, ICG
- Mr. Andrew B. Shaindlin, Caltech Alumni Association
- Mr. David L. Wheeler, Chronicle of Higher Education

The session was moderated by Ms. Britta Baron from University of Alberta.

Session Report

A report titled *Looking Beyond the Global Economic Crisis: International Education Ten Years Out* was released at the session. It is available free of charge from ICG and can be accessed at www.icg.ac.

2008 ICG THOUGHT LEADER SESSION AT NAFSA: UNIVERSITY ALLIANCES

University Alliances

The second annual ICG Thought Leader Session was held at the 2008 NAFSA Conference in Washington, DC.

The session was dedicated to a discussion of three prominent international university alliances – IARU, the IDEA League, and Universitas 21. It drew an attendance of more than 50 participants from 17 countries.

Presenters and Moderator

Presenters included:

- Dr. John Andersen from Københavns Universitet (IARU)
- Dr. Piers Baker from Imperial College London (IDEA League)
- Mr. Anders Hagström from the ETH Zürich (IDEA League)
- Dr. Christopher Tremewan from the University of Auckland (Universitas 21)

The session was moderated by Mr. Christopher Madden from Griffith University.

Session Report

A report titled *University Alliances* was released at the session. It is available free of charge from ICG and can be accessed at www.icg.ac.

2007 ICG THOUGHT LEADER SESSION AT NAFSA: BEST PRACTICES IN INTERNATIONAL EDUCATION

Best Practices in International Education

The first annual ICG Thought Leader Session was held at the 2007 NAFSA Conference in Minneapolis.

The session was dedicated to a survey of current best practices in international education. It drew an attendance of 49 participants from 14 countries.

Presenters

Nine institutions from six countries presented best practice initiatives:

- Mr. Stuart Boag from Education New Zealand
- Dr. Robert Coelen from Universiteit Leiden
- Ms. Laurel Bright from the Queensland Department of Education and Ms. Erika Müller-Blass from the Hessisches Ministerium für Wissenschaft und Kunst
- Dr. Ayoub Kazim from Dubai Knowledge Village
- Mr. Chris Madden from Griffith University
- Mr. Wolfgang Mекle from Universität Tübingen
- Dr. Kirk Simmons from the University of Arizona
- Ms. Tracy Thomas from the University of Tasmania

Session Report

A report titled *Best Practices in International Education* was released at the session. It is available free of charge from ICG and can be accessed at www.icg.ac.

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