

# Market Briefing

Europe, CIS and Sub-Saharan Africa



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# Fast facts Europe

- Population: 742.45 million
- Rate of economic growth: 0.5%
- Inflation: -0.28% February 2015
- Unemployment: 11.3% February 2015
- Public spending on education: 4.52% GDP 2009



# Opportunities and challenges

## Poland

Poland	Data	Year							
	Sum of DATA YTD Enrolments				Sum of DATA YTD Commencements				
Sector	2011	2012	2013	2014	2011	2012	2013	2014	
Higher Education	29	27	24	23	11	7	9	9	
VET	90	88	91	116	53	56	60	87	
Schools	2	0	0	0	0	0	0	0	
ELICOS	82	87	81	102	75	74	67	73	
Non-award	15	15	15	16	12	14	13	15	
Grand Total	218	217	211	257	151	151	149	184	

# Opportunities and challenges

## UK

	Data	Year							
	Sum of DATA YTD Enrolments				Sum of DATA YTD Commencements				
Sector	2011	2012	2013	2014	2011	2012	2013	2014	
Higher Education	373	339	320	310	127	116	113	124	
VET	474	458	480	491	286	303	319	306	
Schools	36	38	32	21	11	20	11	8	
ELICOS	8	7	5	4	6	6	2	3	
Non-award	221	213	278	302	139	146	199	197	
Grand Total	1,112	1,055	1,115	1,128	569	591	644	638	

# Opportunities and challenges

## Italy

Italy	Data	Year							
	Sum of DATA YTD Enrolments				Sum of DATA YTD Commencements				
Sector	2011	2012	2013	2014	2011	2012	2013	2014	
Higher Education	92	89	101	111	41	42	47	45	
VET	114	151	238	451	86	108	187	341	
Schools	128	194	190	201	122	187	185	193	
ELICOS	139	152	249	379	115	127	218	321	
Non-award	34	48	58	63	28	43	53	60	
Grand Total	507	634	836	1,205	392	507	690	960	

# Fast facts Commonwealth of Independent States

- Population: 285 million
- Rate of economic growth: 0.32% (Russia 2014)
- Inflation: 16.7% (Russia 2015)
- Unemployment: 5.2% (Russia 2014)
- Public spending on education: 4.52% (2009)

- Armenia
- Azerbaijan
- Belarus
- Kazakhstan
- Kyrgyzstan
- Moldova
- Russia
- Tajikistan
- Uzbekistan



# Opportunities and challenges

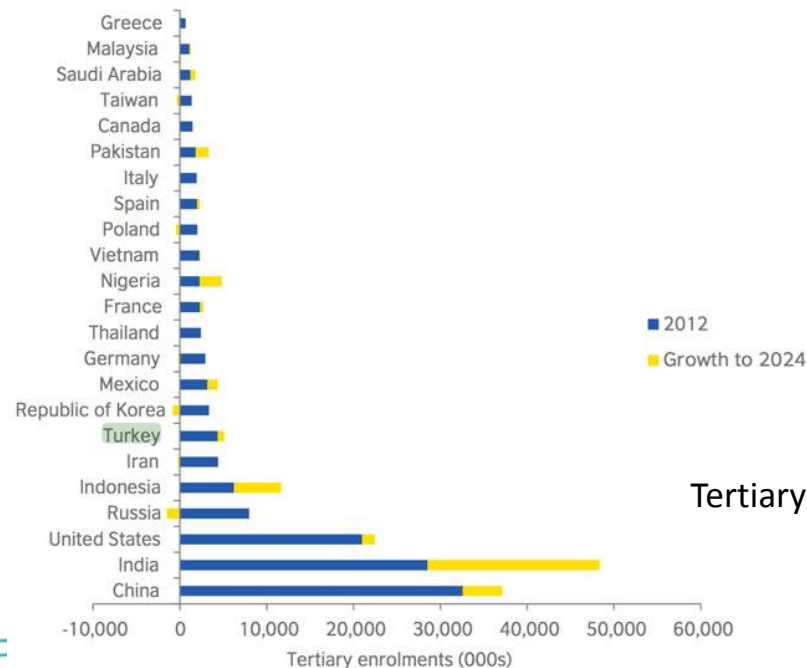
## Russia

Russia	Data	Year							
	Sum of DATA YTD Enrolments				Sum of DATA YTD Commencements				
Sector	2011	2012	2013	2014	2011	2012	2013	2014	
Higher Education	153	168	193	212	66	73	93	89	
VET	35	36	25	38	23	22	14	34	
Schools	43	58	41	39	31	36	8	19	
ELICOS	99	93	116	117	67	70	84	92	
Non-award	7	8	6	12	6	4	5	11	
Grand Total	337	363	381	418	193	205	204	245	

# Opportunities and challenges

## Turkey

Turkey	Data	Year							
	Sum of DATA YTD Enrolments				Sum of DATA YTD Commencements				
Sector	2011	2012	2013	2014	2011	2012	2013	2014	
Higher Education		68	68	65	47	27	25	28	12
VET		76	90	93	75	53	61	59	46
Schools		0	2	3	3	0	2	1	0
ELICOS		201	124	59	73	128	83	37	63
Non-award		9	6	11	14	9	6	11	13
Grand Total		354	290	231	212	217	177	136	134

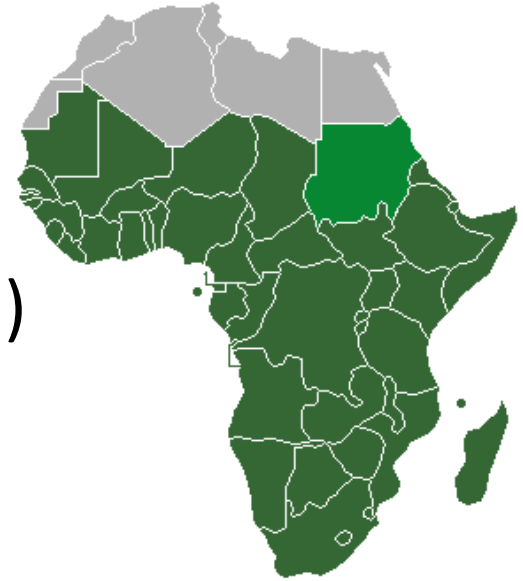


Tertiary enrolment growth, 2012-2024.



# Fast facts Sub-Saharan Africa

- Population: 936 million (2013)
- Rate of economic growth: 4.1% (2013)
- Inflation: 4.9% (World Bank 2014)
- Unemployment: 17% (Gallup 2011)
- Public spending on education: 18% (2010)



# Opportunities and challenges

## Nigeria

- Use of Education Agents
- Economic declines
- Safety and stability

Nigeria	Data	Year							
	Sum of DATA YTD Enrolments				Sum of DATA YTD Commencements				
Sector	2011	2012	2013	2014	2011	2012	2013	2014	
Higher Education		57	58	79	144	22	25	39	88
VET		5	8	17	42	3	3	13	35
ELICOS		0	3	8	18	0	3	8	14
Non-award		2	1	0	6	1	1	0	6
Grand Total		64	70	104	210	26	32	60	143

# Conclusion

- Maximise our academic and industry strengths in emerging markets
- Develop long term focus
- Consider prestige and reputation
- Ensure diversity
- Austrade inaugural West Africa Education Exhibition

