

Australian international education: global, responsible and sustainable

Responsible

Pillar 1 **GOAL 1** Getting the fundamentals

Australia will work to create an education system that stands out as the best in the world, with some of our institutions ranked among the very best.

STRATEGIC ACTIONS

- 1.1 Embracing the freedom to achieve excellence
- 1.2 Investing in world-class research and research infrastructure
- 1.3 Supporting better information on quality performance
- 1.4 Providing quality assurance while reducing red tape

Australia's international education strategy

Global

Australia will build on our strong

education and research partnerships to broaden engagement in international education.

- 2.1 Strengthening and diversifying institutional partnerships
- 2.2 Investing in high-quality international research collaborations
- 2.3 Building confidence through government-togovernment engagement
- 2.4 Broadening engagement to create new opportunities

GOAL 3

GOAL 2

Australia will foster an international outlook among Australian students and researchers.

- 3.1 Preparing students for global engagement
- 3.2 Rejuvenating language study

GOAL 4

GOAL 5

Australia will attract more of the world's students and researchers.

- 4.1 Attracting students from around the world
- 4.2 Marketing Australia as a high-quality education destination
- 4.3 Building lasting connections with alumni

Sustainable

Pillar 3

Pillar 2

Reaching out

to the world

Staying competitive

Australia will continue to improve the quality of the educational and living experience for international students.

- 5.1 Maintaining competitive visas and strong consumer protections
- 5.2 Identifying work experience opportunities 5.3 Improving English language proficiency
- 5.4 Improving access to public transport and
- health services 5.5 Improving access to suitable and affordable accommodation
- 5.6 Increasing community engagement

GOAL 6

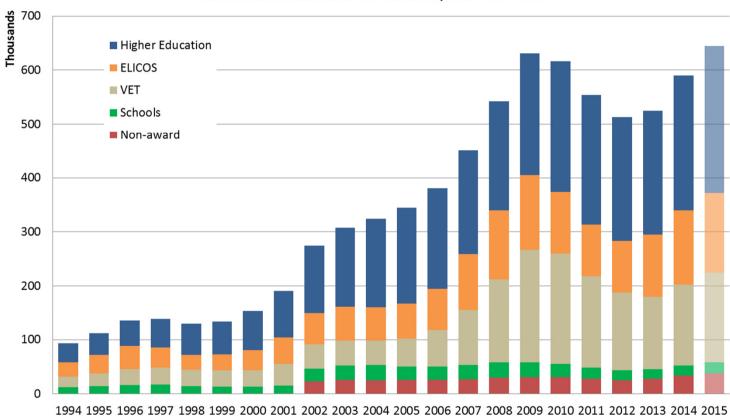
Australia will embrace new opportunities to grow international education.

- 6.1 Leading good practice in new modes of delivery, including online
- 6.2 Enhancing opportunities to provide education services overseas
- 6.3 Understanding the opportunities

International student enrolments, 1994 to 2015

2015 could be a **record** year?

2014 was for higher education and non-award.



AIE 2025

A market development plan for Australian International Education.

 Incorporates a target of doubling the number of international students in Australia by 2025.



How to Double a Number: The Rule of 72

- If you want to double a number in 10 years: 72÷10 = 7.2 i.e. you need 7.2% compound annual growth.
- If you want to double a number in 20 years: 72÷20= 3.6
 i.e. you need 3.6% compound annual growth



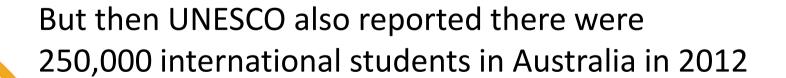
Note: The rule starts to break down for periods of less than 5 years - then you need a calculator.

Prediction:

8 million international students globally by 2025?

(source uncertain)

UNESCO definition (which excludes any cross-border episodes of less than 1 year duration) captured 4.5 million in 2012.



How does Australia compare?

What was the most popular destination for English Language students in 2013?

a) United Kingdom 🗸

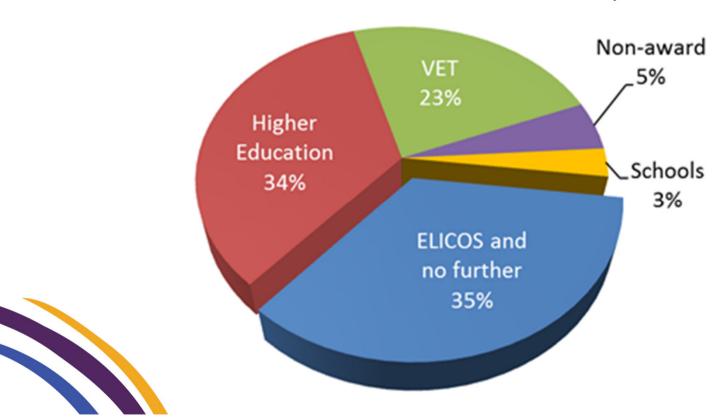


- b) United States
- c) Australia

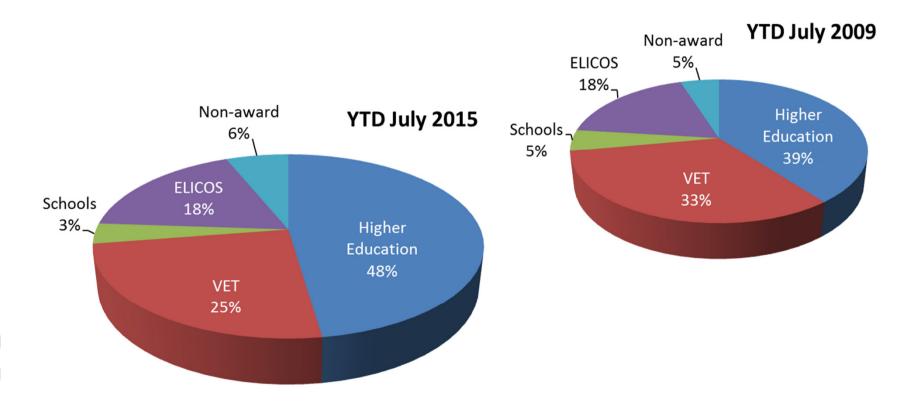


ELICOS as a first step

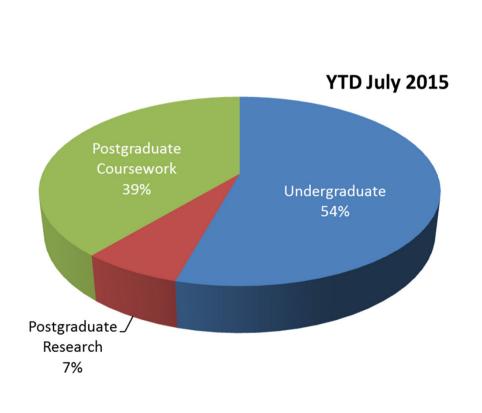
Next enrolment after an ELICOS course, 2014

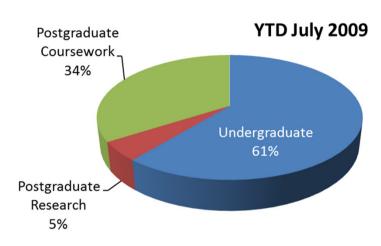


Enrolments by Sector Year-to-Date (YTD) July



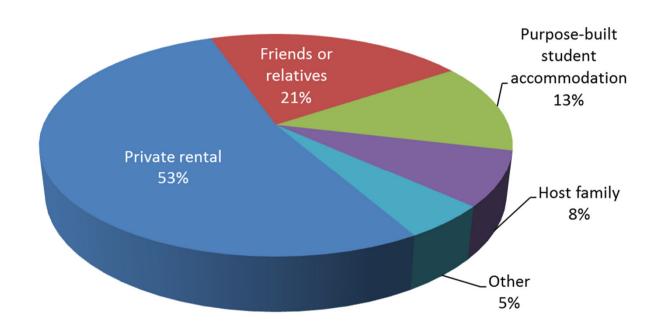
Enrolments in higher education by level of study





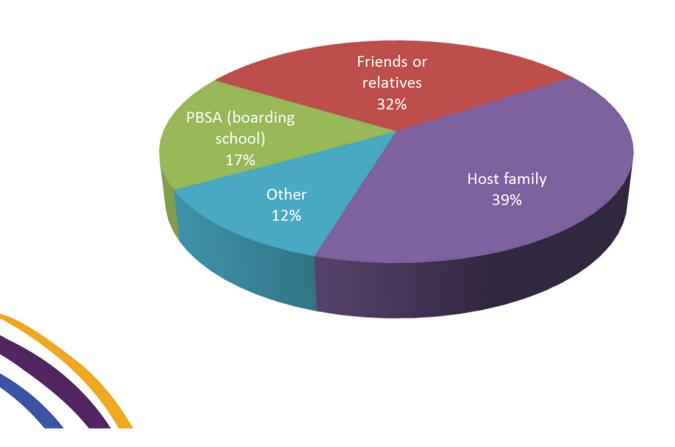
Challenges for future growth in Australian international education

International tertiary student accommodation - 2014



For ELICOS students, 21% stayed with a host family.

International school student accommodation - 2014



How does Australia compare?

JLL reported that the proportion of higher education students living in PBSA in Australian cities was 10%. For greater London, the same figure was:

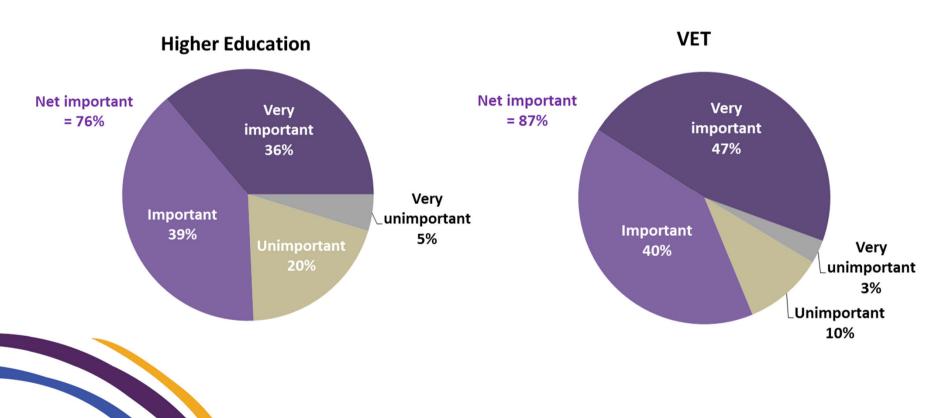
- a) 47%
- b) 37%
- c) 27%

Australia's accommodation future

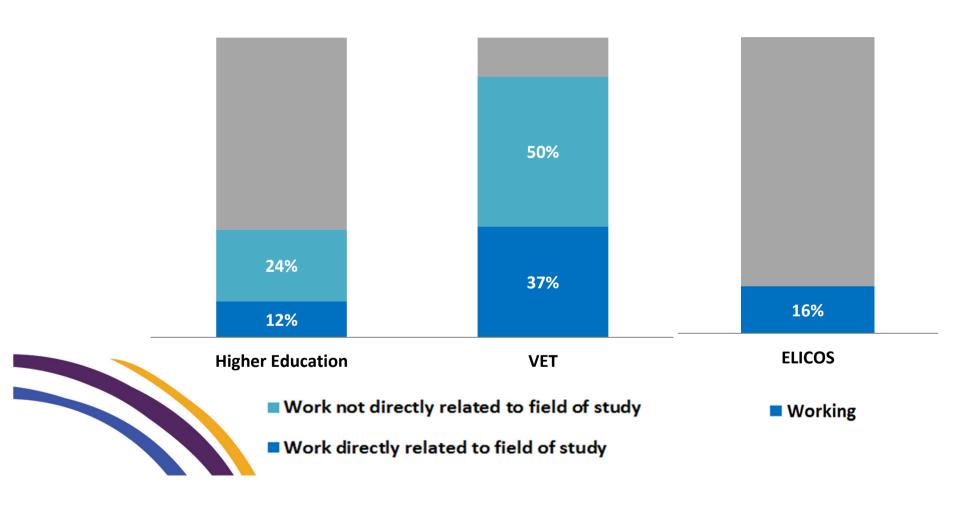
- Purpose-built student accommodation (PBSA) beds are growing in number by about 5% per annum.
- The number of PBSA beds available to domestic and international students is now 75,000 and is expected to exceed 100,000 by 2020.



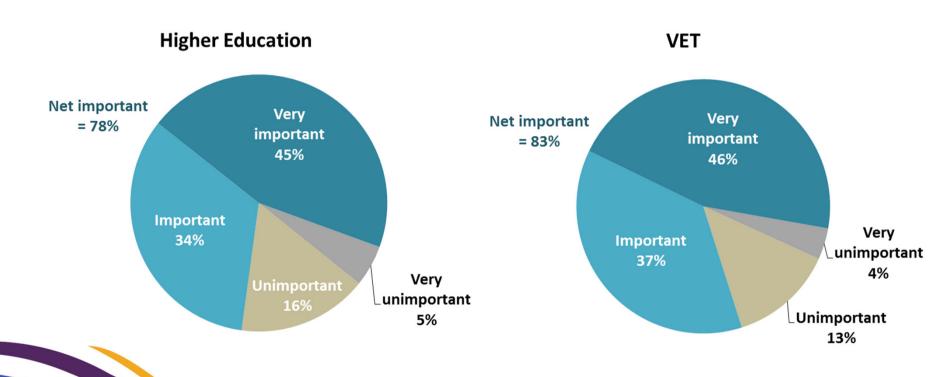
Opportunities to work in Australia while studying



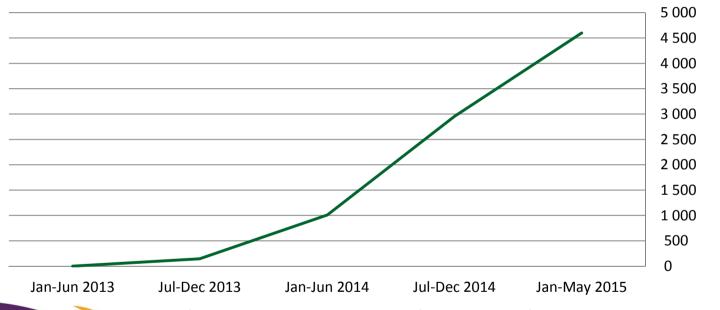
Working and Field of Study



Opportunity for work in Australia after study



Subclass 485 Post Study Work Visa Lodged*



International graduates, 2014:

Bachelors: 26,000

Masters (C/w): 28,000

Masters (Res): 200

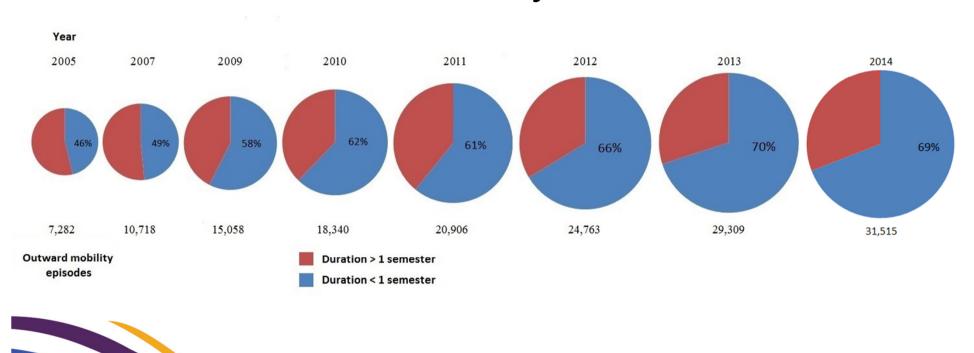
PhD: 1,600.

*by applicants whose student visa (primary holders) expired in the same period

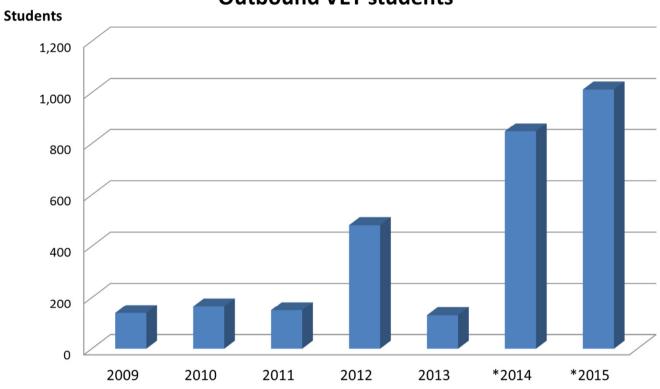
Student mobility

Students from Australian education students studying overseas

Australian student mobility – 2005 to 2014



Outbound VET students



* Includes AsiaBound VET

Around \$750 million to support international student mobility in 2013

Australian Government support for international students					
Scholarships and Fellowships	Number	Total value			
2013 Round Endeavour Scholarships and Fellowships (465 Non- Australians + 151 Australians)	616	\$32.2 million			
International Postgraduate Research Scholarships (IPRS)	330	\$20 million			
Australia Awards (Scholarships and Fellowships) Department of Foreign Affair and Trade	4,500	\$310.0 million			
Total	5,446	\$362.2 million			

Australian university support for international students			
Type of students	Total value		
Postgraduate research students	\$334.6 million		
Other students	\$29.8 million		
Total	\$364.4 million		

Provider mobility

Australian providers teaching overseas

(also known as transnational education)

Australian higher education provider mobility

Higher education delivery to international students							
	Students			% Growth			
Delivery to	2012	2013	2014	2013	2014		
International students in							
Australia	215,592	218,286	236,156	1.2%	8.2%		
Students at offshore							
campuses	82,468	84,785	85,873	2.8%	1.3%		
Distance education							
students offshore*	25,552	25,331	25,531	-0.9%	0.8%		
Sub-total of all trans-							
national students**	108,020	110,116	111,404	1.9%	1.2%		
Grand Total	323,612	328,402	347,560	1.5%	5.8%		

^{*} includes online learning and correspondence students studying award courses.

^{**} includes around 500 Australian domestic students studying from another country.

Australian universities offshore 2014

International Campus	Australian Institution	Country	
1. Ngee Ann-Adelaide Education Centre	The University of Adelaide	Singapore	
2. International Study Centre, Dubai	Murdoch University	UAE	
3. Curtin in Singapore	Curtin University	Singapore	
4. Curtin in Sarawak		Malaysia	
5. HK Management Association (HKMA)	University of Technology, Sydney	Hong Kong	
6. Shanghai University			
7. Singapore Institute of Aerospace Engineers			
8. SEG International Penang	University of Southern Queensland	Malaysia	
9. SEG International Sarawak			
10. SEG International Kuala Lumpur			
11. SEG International Subang Jaya			
12. SEG International Kota Damansara			
13. AGSM	University of New South Wales	Hong Kong	
14. Swinburne University of Technology, Sarawak Campus	Swinburne University of Technology	Malaysia	
15. RMIT International University	RMIT University	Vietnam	
16. University of Newcastle, Singapore	University of Newcastle	Singapore	
17. Monash University South Africa	Monash University	South Africa	
18. Monash University Malaysia		Malaysia	
19. JCU Singapore	James Cook University	Singapore	
20. Australian College of Kuwait	Central Queensland University	Singapore	
21. INTI Laureate	University of Wollongong	Malaysia	
22. UOW Dubai Campus		UAE	
23. Royal Institute of Management	University of Canberra	Bhutan	
24. EAST China University of Science and Technology		China	
25. Hangzhou Normal University		Hong Kong	
26. Harbin Normal University		Singapore	
27. Ningbo University		Vietnam	
28. Lingnan Institute of Further Education			
29. School of Continuing Education Hong Kong Baptist University			
30. M2 Academy (previously called: Asia Global Graduate School)			
31. International Education Institute (IEI), VNU HCMC			

14 Australian universities have offshore campuses, but 34 universities and 4 other higher education providers had offshore programs in 2014.

The 14 universities with campuses accounted for 70% of all students enrolled offshore.

The top 3 universities with the largest number of offshore students were:

RMIT; Monash; and Murdoch.

Mobile VET providers

- In 2013, Australian public VET providers reported 49,740 student enrolments outside Australia (72% in China).
- In 2011, Australian private VET providers reported 6,771 students enrolled outside Australia (31% in Singapore).
- Only 15 students from India were reported enrolled in public VET providers (in 2013).

Online education (including MOOCs)

Coursera statistics

- The company commenced in 2012.
- 25 million people have enrolled,
 1 million (4%) have completed courses.



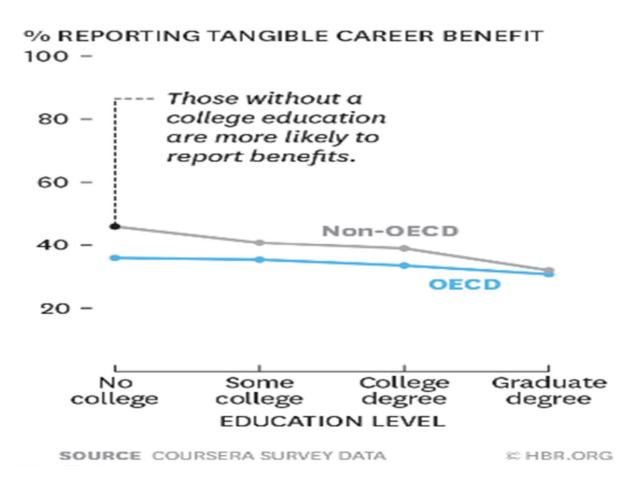
Online education (including MOOCs)

A 2015 survey of completed students found:

- 75% were over the age of 30.
- 72% reported a career benefit –
 e.g. 26% found a new job, 6% got a pay rise.
- 61% reported an education benefit –
 e.g. 12% course prerequisite, 8% degree credit.

(Source: Harvard Business Review report)

Who is getting benefit from MOOCs?



What is an appropriate annual growth rate for Australian international education?

- a) 2%
- b) 7.2%
- c) 12%



(There is no right answer)