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australian international
education conference

6–9 October 2015

Adelaide Convention Centre

international education: global responsible sustainable

The essentials of international education explained

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Presenters

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International
Director,
CQUniversity



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Timing

- 10.45 - 10.50** Introduction
- 10.50 - 11.00** Icebreaker (10 mins)
- 11.00 - 11.10** Content (10 mins)
- 11.10 - 11.25** Quiz (10 mins)
- 11.25 - 11.30** Change tables
- 11.30 - 11.40** Content (10 mins)
- 11.40 - 11.50** Quiz (10 mins)
- 11.50 - 12.00** Awards ceremony (10 mins)





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Part One

What is international education?

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- International student recruitment
- International admissions
- Student mobility
- International compliance and governance
- International student administration and student experience
- Transnational education (TNE)
- International partnerships, relations and networks
- Internationalised curriculum
- Pathways and ELICOS

So what is it?

It's a means to allow **students** to think with an **international** or **global** perspective through connecting them with different societies and belief systems which will help them understand and embrace cultural differences and similarities.



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Why does the industry exist?

- Soft diplomacy
- Enhances a nation's international standing
- Contributes to a dynamic, multicultural community
- Clever employers harness the benefits of international students in the workplace
- Cold hard cash – huge international service export industry (biggest in in Australia) – which keeps many education sectors afloat
 - Huge knock on benefits to hospitality and tourism, entrepreneurial ventures, etc.



How important is it?

Word cloud created from international education strategies of USA, UK and Australia

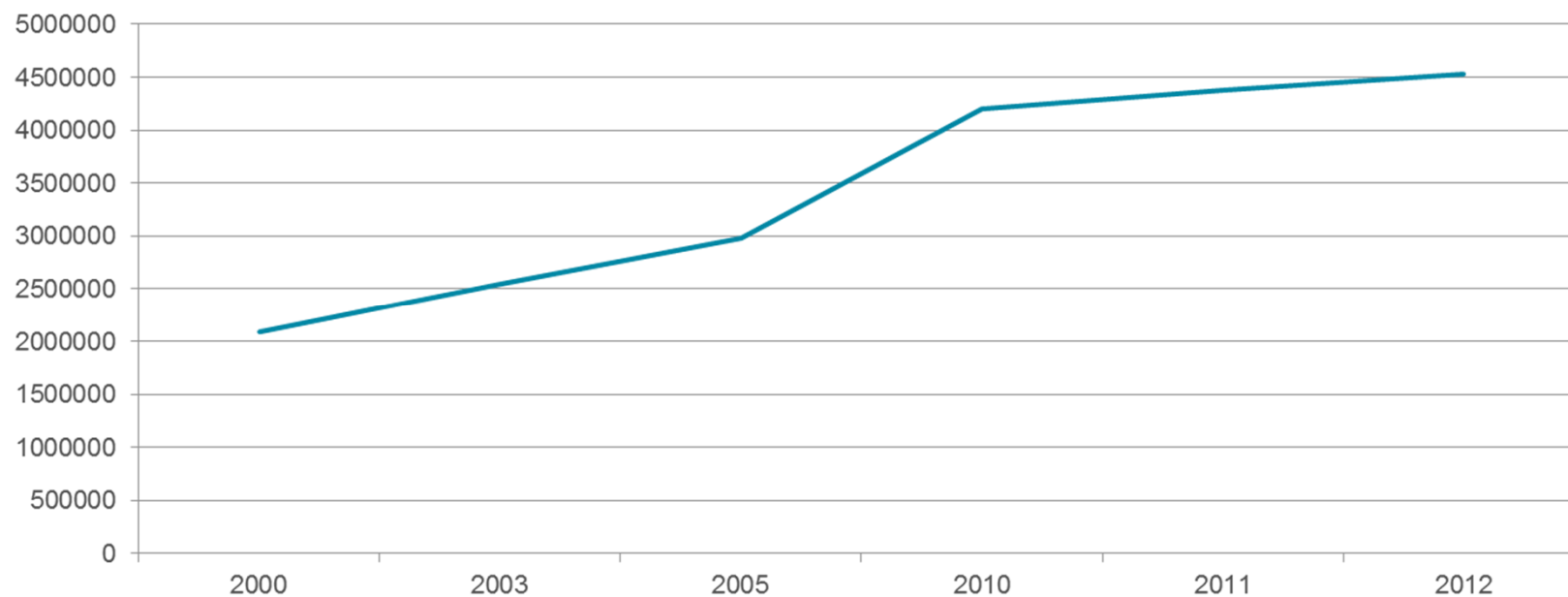
australias also strategy support including
opportunities research work english
higher australian global
our national **students** new countries
education
international
institutions uk australia world
student government through
language study overseas quality



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Global growth

Number of foreign tertiary education students enrolled outside their country of origin, 2000-2012



OECD (2014), *Education at a Glance 2014: OECD Indicators*, Table C4.6, page 361.



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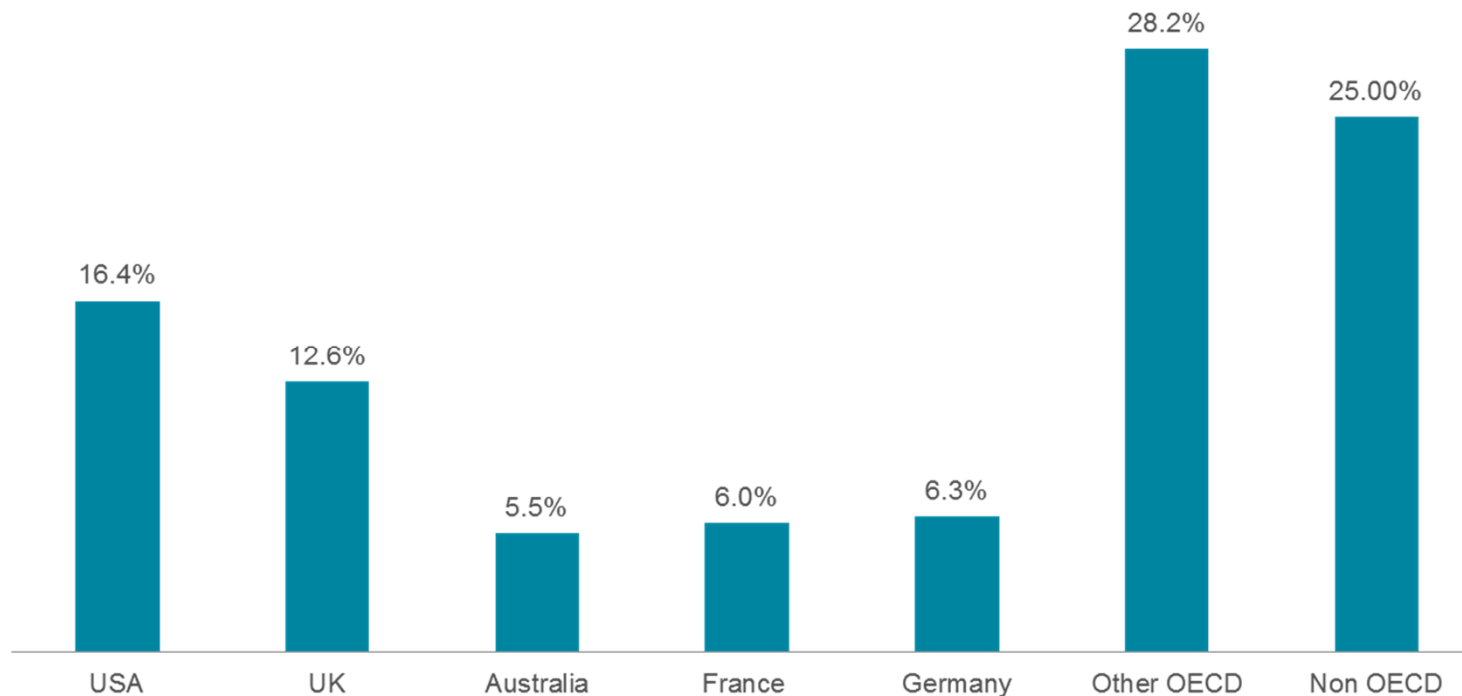
Global growth cont'd

- Driven by demand from China, India, Republic of Korea, Germany and France
 - Accounted for more than 30% of international students
- Globally 53% of students are Asian
- In Australia, this figure is closer to 80%
- Australia, the UK, Switzerland, New Zealand and Austria have the highest percentages of international students among their tertiary enrolments.
- Beware the “new” entrants, particularly China and India
 - Rise of new world languages – Mandarin / Hindi

Distribution of foreign students

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Distribution of foreign students in tertiary education by country of destination, 2012

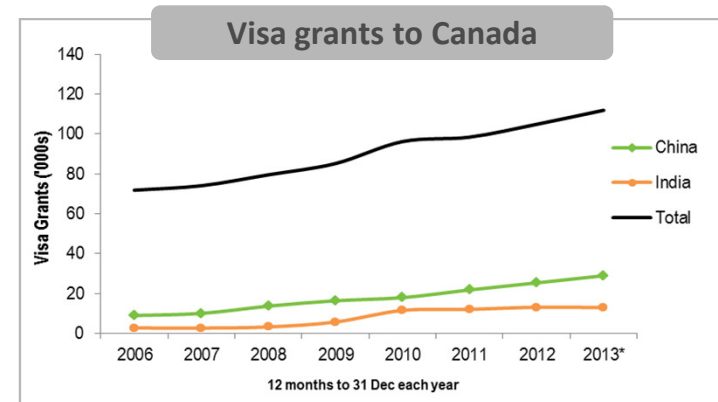
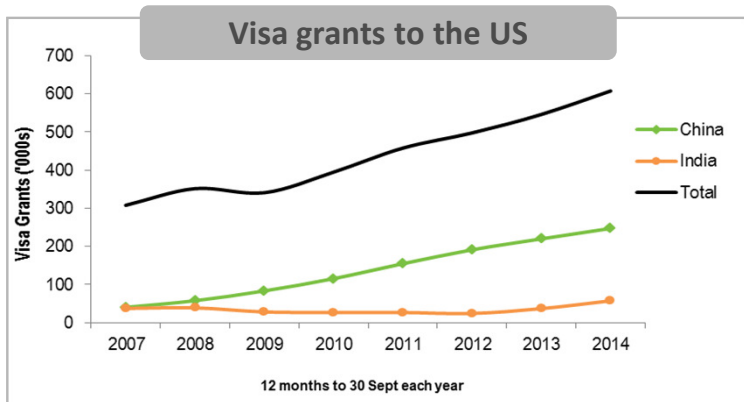
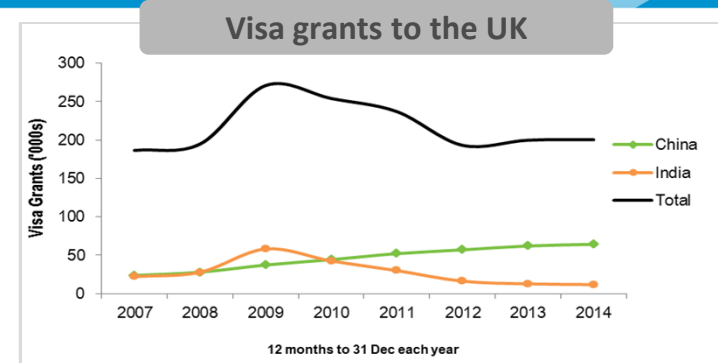
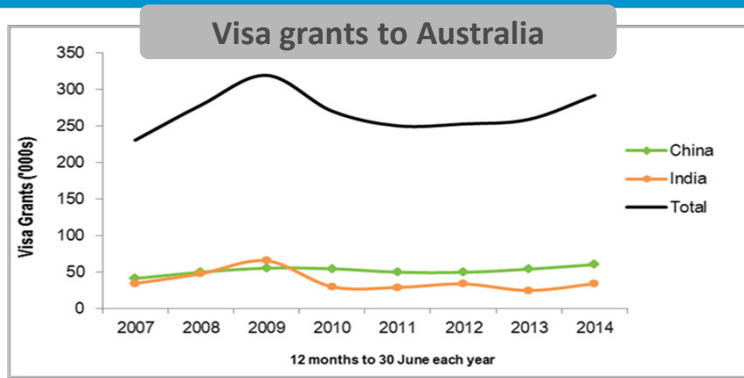


OECD (2014), *Education at a Glance 2014: OECD Indicators*, Table C4.4, page 358-359.



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Four key English speaking destinations

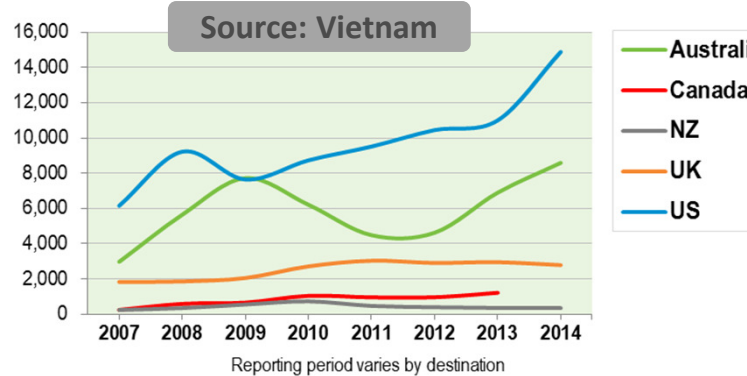
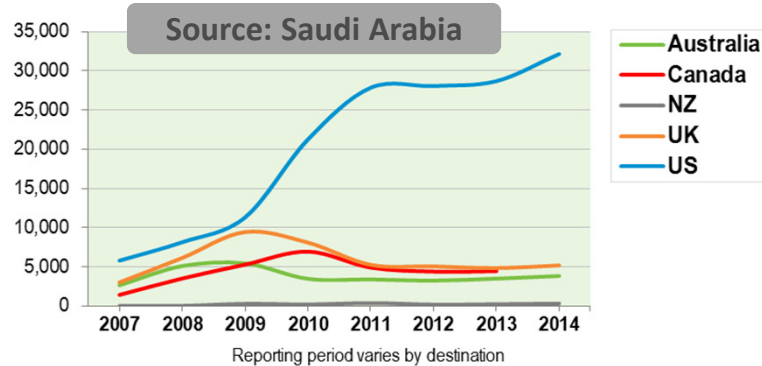
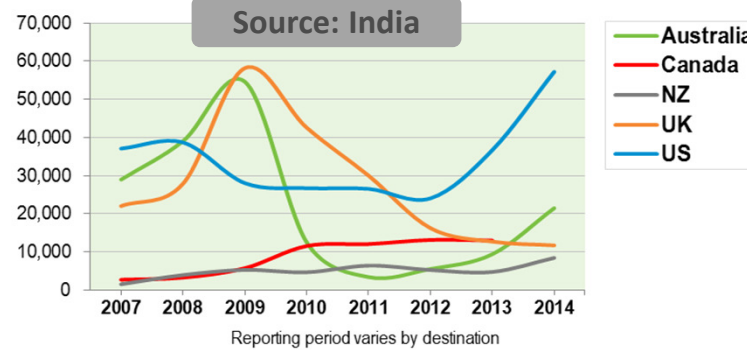
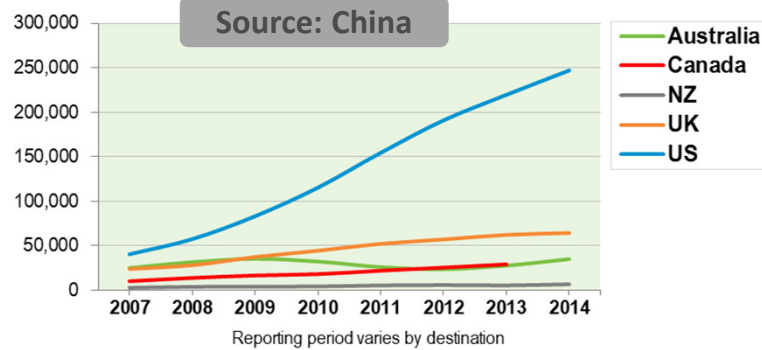


Sources: Australia DIBP, Canada CIC *2013 preliminary data, UK Border Agency, US Dept. of State
Slide developed by Lyndell Jacka, IDP Education



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Visa grants: some key source markets



Note: Data based on Australia and NZ – offshore only, UK - offshore, non-EU only, Canada and US – total
Sources: NZ Department of Labour (Immigration) Australia DIBP, Canada CIC *2013 preliminary data, UK Border Agency, US Dept. of State



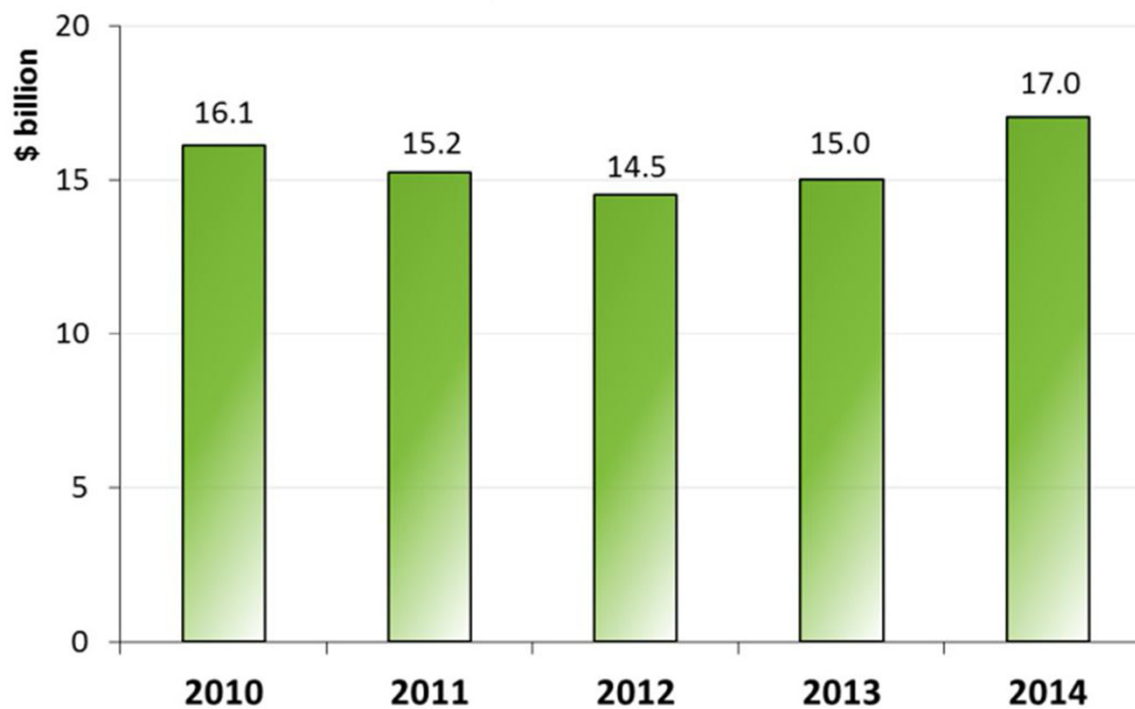
Brief history of international education in Australia

- 1904: First student
- 1950: Colombo Plan instated
- 1985: Full-fee paying program introduced
- 1990: Subsidised student program ends
- 1991: ESOS Act and CRICOS
- 1989-90: IDP commenced recruiting students
- 2000: ESOS updated, PRISMS and eCoEs
- 2004: IEAA established
- 2009-10: "The Perfect Storm"
- 2013: Recovery commenced, particularly in Semester 2
- 2013: New Colombo Plan 2014:
Pilot program launched
(Hong Kong, Indonesia, Japan and Singapore)
- 2014: New Colombo Plan expanded
- 2015: Draft National Strategy for International Education



Export income: onshore

Onshore in Australia: Export income from education services



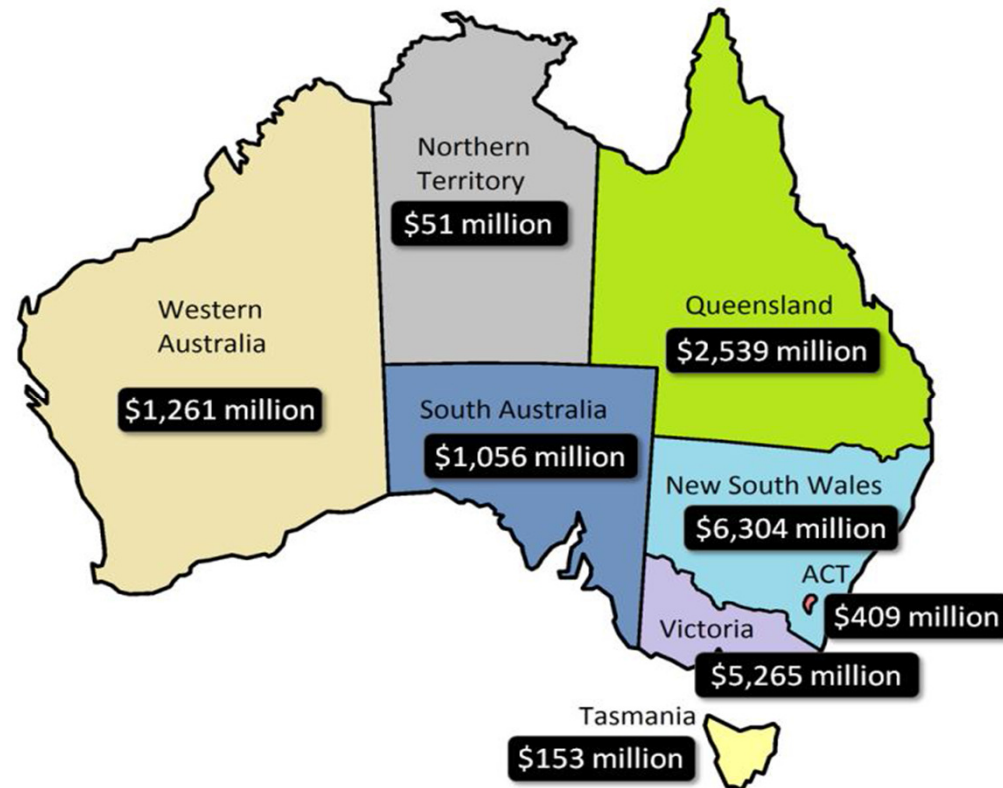
Research Snapshot, Australian Education International, June 2015



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Export income by state and territory in 2014

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Research Snapshot, Australian Education International, June 2015



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Austrade forecast 2020

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Nationality	2002	Rank	2013	Rank		2020 Forecast	Rank
China	44,570	1	150,116	1		China	1
India	10,974	10	49,265	2		India	2
South Korea	17,348	4	27,580	3		Pakistan	3
Vietnam	3,828	13	26,015	4		Philippines	4
Thailand	14,280	7	21,762	5		Indonesia	5
Malaysia	17,177	5	21,208	6		Vietnam	6
Brazil	3,819	14	17,554	7		Brazil	7
Indonesia	19,864	2	17,131	8		Bangladesh	8
Nepal	1,446	26	14,351	9		Saudi Arabia	9
Pakistan	1,680	25	12,869	10		South Korea	10
Colombia	2,182	21	12,030	11		Thailand	11
Japan	15,794	6	11,595	12		Colombia	12
Saudi Arabia	115	73	10,352	13		Nigeria	13
USA	10,987	9	9,469	14		Mexico	14
Philippines	948	32	8,830	15		Kenya	15
Other	90,924		116,805				
Total	255,936		526,932				

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The politics of international education in Australia

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Senator Simon Birmingham
Minister for Education & Training
*Scrapped the current Higher Education
Reform Package*



Senator Richard Colbeck
Minister for Tourism & International Education
(non Cabinet)



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The politics of international education in Australia

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Hon Julie Bishop MP
Minister for Foreign Affairs
New Colombo Plan



Andrew Robb AO MP
Minister for Trade & Investment
Austrade's 2025 International Education Strategy



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The politics of international education in Australia

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Peter Dutton MP

Minister for Immigration and Border Protection

Scrapped the Assistant Minister for Immigration who had responsibility for student visa issues but Michael Ferguson temporarily acting as Senior Advisor



Many state and territory governments also have international education arms and strategies



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Industry peak bodies

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Draft national strategy for international education



- Key IEAA recommendations:
 - Cross-government coordination (i.e. Ministerial Coordinating Council)
 - Enhanced provision of training for professional staff and education agents
 - Enhancing employability opportunities for students
 - Provision of quality and affordable student accommodation

- Strategic priorities over the next 12 months should include:
 - Finalisation of the ESOS Review (including an education agent accreditation model)
 - submitted for review this week
 - Reformed student visa framework that incorporates course quality, consumer and immigration risk

<https://internationaleducation.gov.au/International-network/Australia/InternationalStrategy/Documents/Draft%20National%20Strategy%20for%20International%20Education.pdf>



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Two main mechanisms regulate international education:

- **ESOS framework**
Legislation and standards placing obligations on education providers for overseas students (student visa holders)
- **Quality Assurance**
Registration, accreditation and ongoing monitoring of courses and providers



Aim of the ESOS framework

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- Protect and enhance Australia's reputation for quality education and training services
- Protect the interests of international students by:
 - Standards, roles and responsibilities for education institutions that teach overseas/international students
 - Ensuring they receive the tuition for which they have paid and, if provider collapse, they receive either alternative tuition or refund
- Support the integrity of Australia's migration program



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Quality assurance

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- Tertiary Education Quality and Standards Agency (TEQSA)
- Australian Skills Quality Authority (ASQA)

Commonwealth responsibilities

- Administration of ESOS Act 2001 and National Code 2007
- CRICOS registration
- Operation of quality assurance frameworks
- Australian Qualifications Framework (AQF)



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ESOS review

- Reducing reporting burden from 5/14 to 30 days
- Remove designated accounts
- Study periods more flexible
- 50 per cent pre-paid tuition fee cap to stay but voluntary payments beyond in new paper
- Lifting the 25% cap on online/distance learning?
- Written agreements focussing on refund policy (instead of 6/12 month rule changes)



IEAA Agent Quality Assurance Project

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- Scope potential for a quality framework for international education agents, including an agent accreditation system and code of ethics.
- Other approaches to QA (Canada, NZ, US, UK)
- Research stakeholder consultation offshore:
 - India, China and onshore
- Survey released to all international education stakeholders – 970 responses
- Focus groups
 - Gauge opinions from the various stakeholder groups across the industry on options, issues, challenges and best practice to help inform possible models for an Australian education agent quality framework.



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SVP to SSVF

Streamlined Student Visa Processing to Simplified Student Visa Framework from July 2016

- All providers under one framework
- From eight to two visa subclasses
- Simple, single immigration risk framework

		Country risk rating		
		1	2	3
Institution risk rating	1	S	S	S
	2	S	S	R
	3	S	R	R



Post-study work rights (PSW)

- Commenced 23 March 2013
- New stream of the Temporary Graduate (subclass 485) Visa
- Two to four years duration, depending on study level
- No link to skilled migration program
- Completed 2 years of academic study, in no less than 16 calendar months
- Applicants must:
 - apply in Australia
 - have recognised English language proficiency
 - apply for the visa within 6 months of completing the qualification





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Part Two

Student Mobility

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- Study Abroad & Exchange – Education Abroad – Learning Abroad – Global Learning – Student Mobility – Global Mobility
- Inbound – Outbound – Virtual
- Student and staff exchange
- Study Abroad / Semester Abroad
- Study tours / short-term / faculty led
- Summer / Winter Schools
- Internships / Volunteering
- Island programs



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Student Mobility Funding



- New Colombo Plan
 - \$100m over 5 years to support undergraduates to Indo Pacific
 - Scholarship Program – circa 100 students in 2016
 - Mobility Program – circa 5,500 students in 2016
- Endeavour Mobility (& Cheung Kong)
 - Global program to support VET, UG and PGC (UG is Non-Indo-Pacific only)
 - Multiple programs
- OS-Help
 - Loans of up to: \$6,362 for non-Asia - \$7,635 for Asia - \$1,018 for Asian language study
- State, private and institutional funding



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Student Mobility Numbers

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Type	Number of Experiences
Exchange	8,571
Other Semester or Year Programs	233
Short Term Programs	10,158
Placements or Practical Training	5,874
Research	4,056
Other	595
Total	29,487

AUIDF Mobility Benchmark, Sept 14

14.8% of domestic undergraduate cohort had an international mobility experience in 2013, up from 8.8% in 2009, AUIDF Benchmark 2014



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Student Mobility Rationale

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Student benefits

- Greater international outlook and intercultural understanding
- Improved academic performance and retention
- Improved employability
- Languages and “Asia literacy”

Institutional benefits

- Internationalisation of the educational experience
- Soft-power
- Global branding and ambassadors



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Transnational education (TNE)

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- Various models – offshore campus, partnership model or distance/online education
- Expectation of equivalency
- Affordability
- Offshore students become onshore students



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TNE: important or not?

Higher education delivery to international students					
Delivery to	Students			% Growth	
	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%
<i>Sub-total of all trans-national students**</i>	<i>108,020</i>	<i>110,116</i>	<i>111,404</i>	<i>1.9%</i>	<i>1.2%</i>
Grand Total	323,612	328,402	347,560	1.5%	5.8%

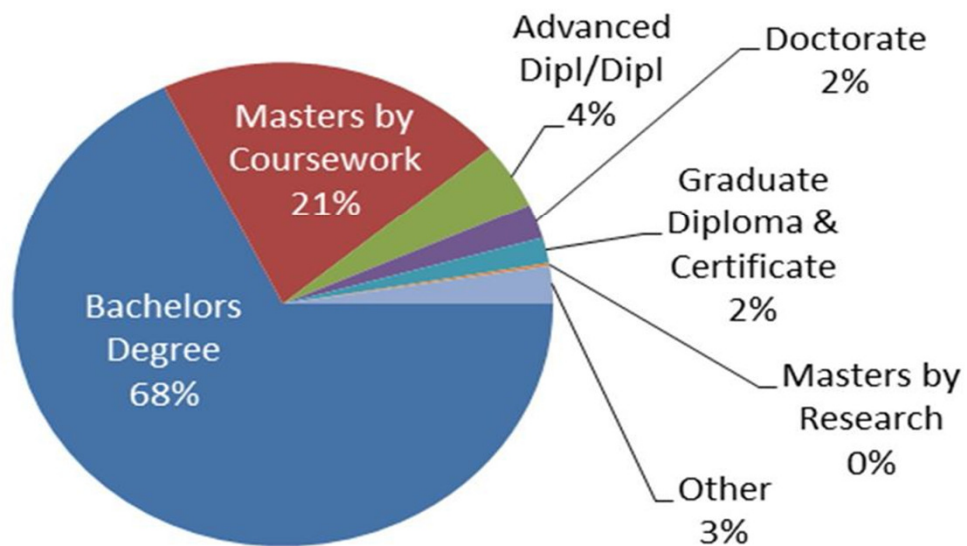
Research Snapshot: Transnational education in the higher education sector, Australian Education International, September 2015



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TNE: levels of study

Figure 1: Transnational students by level of study, 2014

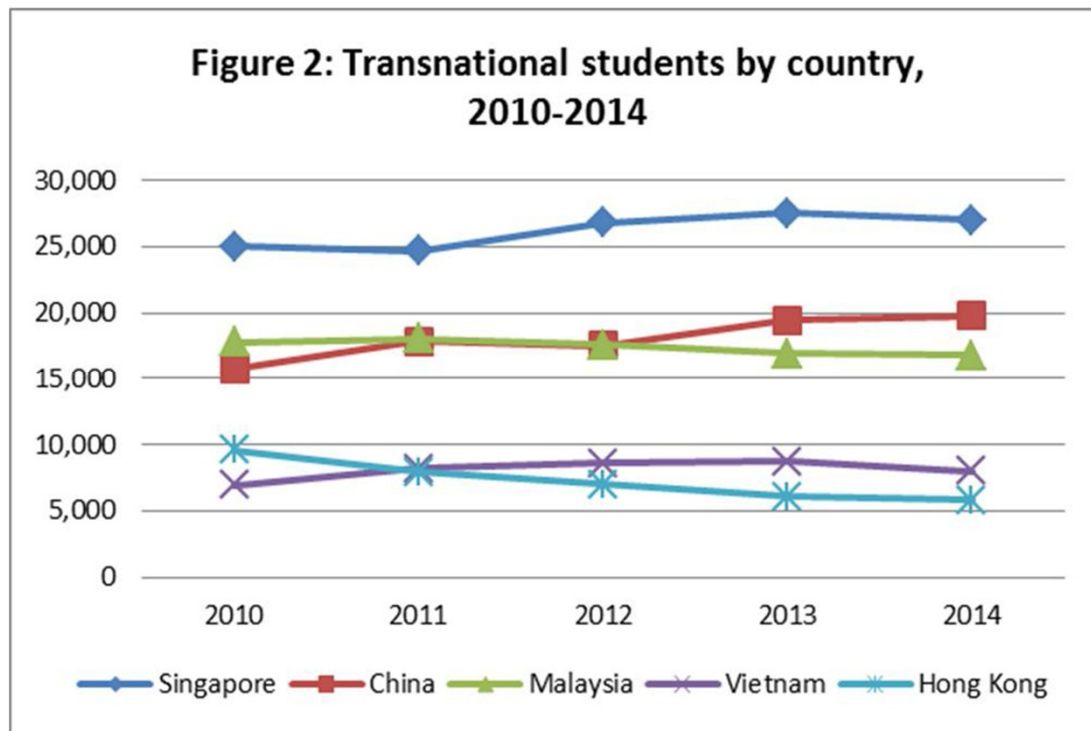


Research Snapshot: Transnational education in the higher education sector, Australian Education International, September 2015



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TNE enrolments by country



Research Snapshot: Transnational education in the higher education sector, Australian Education International, September 2015



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The key ones

- The Academic Ranking of World Universities
- The Quacquarelli Symonds (QS) World University Rankings
- The Times Higher Education World University Rankings



Challenges

- International Student Experience
 - Accommodation
 - Acceptance within Australia
 - Online vs face-to-face

- Graduate Employability
 - Quality Indicators of Learning and Teaching (QILT)
 - AUIDF International Graduate Outcomes survey (2016)

- Brand Australia
 - Austrade is insufficiently funded for international education
 - States and territories pulling in different directions
 - Seen as money grabbing and one direction (overly commercial?)



Challenges

- Australian Elections
 - How will a post-election package affect international education?
 - Will migration including international students be an election topic – is PSW sustainable?

- Global Competition
 - Within Australia
 - From other destination markets
 - Rapidly improving education systems within source markets

- Market volatility
 - Political – Economic – Social – Technical – Legal - Environmental



Competitor destinations and targets

Country	Target	Year
Australia	Attract 520k international students	2020
NZ	Double economic value to \$5b	2025
Canada	Double number of international students	2022
China	Attract 500k international students (150k HE)	2020
Japan	Double number of foreign students to 300k	2020
Malaysia	Attract 200k international students	2020
Taiwan	Double number of foreign students to 88k	2015
UK	Increase number of HE international students by 15-20% in 5 years (approx. 90k)	2018
Germany	Attract 350k international students	2020

Sources: Education Target Reports from each Government - New Zealand, Canada, China, Japan, Malaysia, and Taiwan. Australia – Educating Globally report, UK - International Education: Global Growth and Prosperity , Germany – DAAD's Strategy 2020



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Resources

- University World News: universityworldnews.com
- Austrade's Market Information Package (MIP): austrade.gov.au/MIP
- Data and Research, Australian Department of Education and Training: internationaleducation.gov.au/research
- ICEF Monitor: monitor.icef.com
- British Council Education Intelligence: <https://ei.britishcouncil.org/>
- International Education Update (PIER): pieronline.org
- The PIE News: thepienews.com
- IEAA website & SIGs: www.ieaa.org.au



IEAA Special Interest Groups (SIGs)

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- Admissions & Compliance
- Internationalisation of the curriculum
- Marketing, Recruitment & Communication
- Pathways
- Sponsored Students
- Student Mobility
- Transnational Education

www.ieaa.org.au/special-interest-groups/special-interest-groups



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Resources: Twitter



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@FutureUnlimited
@BritishCouncil
@eduintelligence
@EducationUK
@chinaeducations
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@timeshighered
@insidehighered
@ThePIENews
@DrEducationBlog
@HighEdMarketing

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@HigherEdIQ
@THEworldunirank
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