Presenters

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Associate Director, Int’l Marketing, Recruitment and Admissions, Victoria University

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International Director, CQUniversity
### Timing

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.45 - 10.50</td>
<td>Introduction</td>
</tr>
<tr>
<td>10.50 - 11.00</td>
<td>Icebreaker (10 mins)</td>
</tr>
<tr>
<td>11.00 - 11.10</td>
<td>Content (10 mins)</td>
</tr>
<tr>
<td>11.10 - 11.25</td>
<td>Quiz (10 mins)</td>
</tr>
<tr>
<td>11.25 - 11.30</td>
<td>Change tables</td>
</tr>
<tr>
<td>11.30 - 11.40</td>
<td>Content (10 mins)</td>
</tr>
<tr>
<td>11.40 - 11.50</td>
<td>Quiz (10 mins)</td>
</tr>
<tr>
<td>11.50 - 12.00</td>
<td>Awards ceremony (10 mins)</td>
</tr>
</tbody>
</table>
What is international education?

- 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.
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
Global growth

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

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

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

USA: 16.4%
UK: 12.6%
Australia: 5.5%
France: 6.0%
Germany: 6.3%
Other OECD: 28.2%
Non OECD: 25.0%

Four key English speaking destinations

Visa grants to Australia

Visa grants to the UK

Visa grants to the US

Visa grants to Canada

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

Source: China

Source: India

Source: Saudi Arabia

Source: Vietnam

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
Export income: onshore

Onshore in Australia: Export income from education services

Research Snapshot, Australian Education International, June 2015
Export income by state and territory in 2014

Western Australia: $1,261 million
Southern Australia: $1,056 million
Northern Territory: $51 million
Queensland: $2,539 million
New South Wales: $6,304 million
Victoria: $409 million
Tasmania: $153 million

Research Snapshot, Australian Education International, June 2015
## Austrade forecast 2020

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

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

Senator Richard Colbeck
Minister for Tourism & International Education (non Cabinet)
The politics of international education in Australia

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
The politics of international education in Australia

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
Industry peak bodies
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

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

- 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
Quality assurance

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

Commonwealth responsibilities
- CRICOS registration
- Operation of quality assurance frameworks
- Australian Qualifications Framework (AQF)
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 focusing on refund policy (instead of 6/12 month rule changes)
IEAA Agent Quality Assurance Project

- 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.
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
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
Part Two
Student Mobility

- 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
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
# Student Mobility Numbers

<table>
<thead>
<tr>
<th>Type</th>
<th>Number of Experiences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exchange</td>
<td>8,571</td>
</tr>
<tr>
<td>Other Semester or Year Programs</td>
<td>233</td>
</tr>
<tr>
<td>Short Term Programs</td>
<td>10,158</td>
</tr>
<tr>
<td>Placements or Practical Training</td>
<td>5,874</td>
</tr>
<tr>
<td>Research</td>
<td>4,056</td>
</tr>
<tr>
<td>Other</td>
<td>595</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>29,487</strong></td>
</tr>
</tbody>
</table>

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
Student Mobility Rationale

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
Transnational education (TNE)

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

<table>
<thead>
<tr>
<th>Delivery to</th>
<th>Students</th>
<th>% Growth</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>2012</td>
<td>2013</td>
</tr>
<tr>
<td>International students in Australia</td>
<td>215,592</td>
<td>218,286</td>
</tr>
<tr>
<td>Students at offshore campuses</td>
<td>82,468</td>
<td>84,785</td>
</tr>
<tr>
<td>Distance education students offshore*</td>
<td>25,552</td>
<td>25,331</td>
</tr>
<tr>
<td><strong>Sub-total of all transnational students</strong></td>
<td>108,020</td>
<td>110,116</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td>323,612</td>
<td>328,402</td>
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</table>

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

**"AIEC2015"**
TNE: levels of study

Research Snapshot: Transnational education in the higher education sector, Australian Education International, September 2015
TNE enrolments by country

Figure 2: Transnational students by country, 2010-2014

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

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

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

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
Resources

- University World News: universityworldnews.com
- 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)

- 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
Resources: Twitter

@IEAAustralia
@Austrade_Ed
@FutureUnlimited
@BritishCouncil
@eduintelligence
@EducationUK
@chinaeducations
@IDPRIE
@timeshighered
@insidehighered
@ThePIENews
@DrEducationBlog
@HighEdMarketing

@LowyInstitute
@HigherEdIQ
@THEworldunirank
@CampusReview
@ConversationEDU
@Navitas
@ACPET_national
@HobsonsAPAC
@igraduate
@icefmonitor
@uniworldnews
@IIEglobal