INTERNATIONAL EDUCATION 101: WHAT YOU SHOULD KNOW

Lyndell Jacka, Head of Research, IDP Education
Oliver Fortescue, International Director, CQUniversity
Bronte Neyland, Director, Victoria University International
Schedule

10.30 - 10.35  Welcome
10.35 - 10.45  Ice-breaker
10.45 - 11.00  Part 1: The Big Picture
11.00 - 11.05  Question Time
11.05 - 11.20  Part 2: The Political Context
11.20 - 11.25  Question Time
11.25 - 11.40  Part 3: International Functions
11.40 - 11.45  Question Time
PART 1: THE BIG PICTURE
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
A possible definition?

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 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
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
Global growth

International Student Enrolments: 2000-2012

Future global estimates

UNESCO estimates (2009)

OECD estimates (2009)

Education at a Glance 2015, UNESCO and OECD; IDP estimates
Distribution of foreign students in tertiary education by country of destination, 2013

USA: 19.4%
UK: 10.3%
Australia: 6.2%
Canada: 3.4%
New Zealand: 1.0%
Germany: 4.9%
France: 5.7%
Other OECD: 22.0%
Non OECD: 27.1%

OECD (2015), Education at a Glance 2015: OECD Indicators, Table C4.6
## 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>Double number of international students</td>
<td>2025</td>
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<td>NZ</td>
<td>Double economic value to $5b</td>
<td>2025</td>
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<td>Canada</td>
<td>Double number of international students to 450k</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>
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<tr>
<td>Malaysia</td>
<td>Attract 250k international students</td>
<td>2025</td>
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<tr>
<td>Taiwan</td>
<td>Attract 150k foreign students</td>
<td>2020</td>
</tr>
<tr>
<td>UK</td>
<td>Increase non-EU enrolments by 55,000 additional students</td>
<td>2020</td>
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<tr>
<td>Germany</td>
<td>Attract 350k international students</td>
<td>2020</td>
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<tr>
<td>France</td>
<td>Increase foreign HE enrolments to 20% of total enrolments (approx 70k)</td>
<td>2025</td>
</tr>
<tr>
<td>Turkey</td>
<td>Host 200k international students</td>
<td>2023</td>
</tr>
<tr>
<td>Ireland</td>
<td>Increase foreign student enrolment in HE by 33% and ELT by 25%</td>
<td>2020</td>
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Sources: Education Target Reports from each Government - New Zealand, Canada, China, Japan, Malaysia, Taiwan and Ireland. Australia – Educating Globally report, UK - The Autumn Report 2015, Germany – DAAD’s Strategy 2020, France - Minister of Higher Education, Turkish Prime Ministry’s International Students Department.
Four key English speaking destinations

- **Visa grants to Australia**
  - Note: Onshore and Offshore

- **Visa grants to the UK**
  - Note: Non-EU and offshore only

- **Visa grants to the USA**
  - Note: Non-immigrant F1 & M1 visas

- **Visa grants to Canada**
  - Year permits became effective (1000s)

Sources: Australia DIBP, Canada CIC, NZ Immigration, UK Home Office, US Dept. of State
Slide developed by Lyndell Jacka, IDP Education
But we shouldn’t forget...

Visa grants to New Zealand

- China
- India
- Total

Note: Onshore and Offshore, full fee paying

Sources: Australia DIBP, Canada CIC, NZ Immigration, UK Home Office, US Dept. of State
Slide developed by Lyndell Jacka, IDP Education
Visa grants growth: some key source markets

Note: Data based on Australia/NZ – offshore only, UK - offshore, non-EU only, Canada and US – total
Sources: Australia DIBP, Canada CIC, NZImmigration, UK Home Office, US Dept. of State
Slide developed by Lyndell Jacka, IDP Education
Export income: onshore

Research Snapshot, Australian Department of Education and Training, June 2016
Export income by state and territory, 2015

Research Snapshot, Australian Department of Education and Training, June 2016
Australia’s commencement trends (YTD, July 2016)
Australia’s top markets (visa grants)

Source: Department of Immigration and Border Protection (excluding DFAT and Defence visa grants)
Filtered by: FY2016, Nationality All, and Sector All

- China: 70,449
- India: 29,557
- Brazil: 16,466
- South Korea: 13,032
- Malaysia: 11,438
- Thailand: 11,201
- Nepal: 10,581
- Vietnam: 9,766
- Colombia: 8,845
- USA: 8,443

DIBP, FY ending June 2016
Courtesy: Austrade’s Market Information Package
### Year-to-date commencements

All sectors by top 10 nationalities (State/Territory)

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Australian Department of Education and Training, YTD July 2016

Courtesy: Austrade’s Market Information Package
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Connectivity – at the heart of international education

QUESTION TIME
PART 2: THE POLITICAL CONTEXT
The politics of international education in Australia

Senator the Hon Simon Birmingham
Minister for Education & Training
Builds on his background in the training portfolio

The Hon Julie Bishop MP
Minister for Foreign Affairs
New Colombo Plan
The politics of international education in Australia

The Hon Steven Ciobo MP
Minister for Trade, Tourism & Investment
Austrade’s 2025 International Education Strategy
Marketing and brand strategy
The politics of international education in Australia

The Hon Greg Hunt MP
Minister for Industry, Innovation and Science

Hon. Peter Dutton MP
Minister for Immigration and Border Protection
Industry peak bodies
Federal Government strategies

- National Strategy for International Education
  1. Strengthening the fundamentals
  2. Making transformative partnerships
  3. Competing globally
Federal Government strategies

- Australian International Education 2025 (AIE2025)
  - Aims to maximise the sector’s contribution to Australia’s economy, society and international standing
  - Ambitious targets of:
    - 1 million inbound students
    - 10 million students offshore – “Borderless”

- DFAT’s Global Alumni Strategy

- National Innovation and Science Agenda
State and territory strategies

- **International Education sector strategy – Business Victoria (2016)**
  - Links to wider development and business strategies “integrated”
  - Community engagement
  - Grow the numbers

- **Queensland international Education Strategy (2016 to be released)**
  - Focus on the regions and student experience
  - Increase market share

- **StudyNSW International Education Strategy (2016)**
  - International student experience and growing numbers
  - Support for offshore and “technology enabled” delivery

- **Destination Adelaide – SA International Education Strategy (2015)**
  - Student Growth & experience

- Other states and territories highly active with recent strategies or strategies under way.
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Courtesy: Austrade’s Market Information Package
Increasing the value of international education

The value might be measured by:

- Collaborative research output
- Top 3 student destination country
- Overall economic contribution
- Number of Australians who benefit (e.g. employed in sector, outbound students)
- Brand recognition
- Digital delivery measurement
- Market share metric
Challenges

- Is there a desirable upper limit for an institution's international student ratio?

- Do we allow overseas institutions to build, own and operate primarily international student only campuses?

- How is Australia perceived in the source markets?
  - Contributing to the brain-drain
  - Talking too much about economic value

- Are we delivering on student/parent expectations?
  - Careers
  - Migration
  - Recognition
Legalisation and policies

- Educational Services for Overseas Student (ESOS) Act
- National Code
- Migration Act
- State legislation
- Institutional policies and procedures
Regulatory environment

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
Recent changes to ESOS

- Removal of study period requirements
- Reporting student defaults and refunds
- Flexibility in paying tuition fees upfront

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)
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
SVP to SSVF

- Risk ratings will be updated every 6 months
- No need to opt-in
- No need to nominate education business partners
- Education providers who enrol under 50 active eCOEs assigned a rating of 5
- Risk rating is attached to the eCOE held at the time the student visa application was decided
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
Rankings, ratings and kite marks

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

- MBA rankings and accreditations
- Subject rankings and accreditation

- Student satisfaction (ISB) / Employment outcomes (QILT)
Challenges

- International Student Experience
  - Diversity
  - 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
  - Are States and Territories pulling in different directions?
  - Seen as money grabbing and one direction (overly commercial?)
Challenges

- **Australian Government stability**
  - What happens if there is another change in the current government or an election?
  - 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**
    - What might the Brexit and Trump affect be?
QUESTION TIME
PART 3: INTERNATIONAL FUNCTIONS
International functions

- Marketing and communications
- Recruitment
- Admissions
- Transnational education (TNE) – online education / face-to-face
- Mobility
- Scholarships
- International relations & partnerships
- Student support
- Compliance
- International research & rankings
Marketing and communications

- Brand and the brand assets
- Institutional website
- Course guides
- Orientation guides
- Virtual campus tours
- Apps
- Facebook, Twitter and Instagram etc
- eDMs
- Translated content
- Advertising – print and digital

Increasing realisation by sector that CRM is important!?!
Recruitment

- Identification of markets
- Market specific strategy
  - What is the recruitment lead time?
  - What are your channels?
  - Traditional vs digital recruitment
    - (e.g. virtual fairs)
- Outsourcing
  - Enquiries
  - Admissions
  - Conversions
  - Retention
Agent management

- Identification and evaluation
- Contractual arrangements
  - Legal requirements
  - Institutional requirements
  - Financial incentives
- Onboarding and training
- Communication strategy
  - Visits
  - Agent portal
  - Newsletters
  - Skype training
- Evaluation
  - Renewal
  - Termination
Admissions

- 3 key roles:
  - **Academic**: assess equivalence using NOOSR and UK NARIC guidelines
  - **English language proficiency**: IELTS, TOEFL, PTE, Cambridge or institutional test
  - **Genuineness**: nationality, hometown, age, marital status, gaps in study, career path, likelihood of returning

- How it works & aspects:
  - Delegated authority
  - Faculty/college/dept. decisions
  - Pathways/credit/advanced standing
  - Full offers vs conditional offers
  - Under 18s
Role of scholarships and sponsors

- Federal Government includes:
  - International Postgraduate Research Scholarships (IPRS)
- State Government scholarships
- Institutional scholarships

- Foreign government scholarships:
  - Indonesia
  - Kuwait
  - Saudi Arabia
  - UAE
  - Vietnam
  - Malaysia

- Private Scholarships and Sponsorships
Role of international partnerships

Channels students come through - can lead to more than recruitment (international relations)

- Pathway programs
- Articulations
- Dual degrees
- Joint research projects / cotutelle
Role of business intelligence

Before we talk about marketing and recruitment, what does the research tell us:

- Rob Lawrence
  - Pre-disposition is now at city level, rather than country

- Hobsons’ Beyond the Data: Influencing international student decision making (May 2014)
  - Course, then country, then institution
  - Subject/course rankings over institution rankings
  - Clear brand proposition for each course
  - Fees are 2nd most important factor
  - Student satisfaction not as important as graduate outcomes
  - Institutional efforts raise the country brand, country marketing efforts reinforce sense of welcome and safety
Role of data and importance of CRM

- **Data sources:**
  - International
  - National
  - State
  - Institutional data sources

- **Benchmarking surveys:**
  - Recruitment costs by country, channel and course
  - Institutional resourcing

- **Improving conversion**

- **Putting your data back into the messaging and utilising technology to help the consumer through their decision making journey**
International relations

- Manage institutional agreements with foreign governments or institutions
- Coordinate inward visits by foreign governments and institutions
- Develop and maintain protocols and processes for inward delegation visit
- Support visits to international partners, including assisting with briefing notes, protocols and logistics
- Monitor and report on foreign government policy and initiatives

International research connections
- Joint publications - citation index
- Impacts on rankings
Student mobility

- Inbound, outbound and virtual
- Exchange vs Study Abroad
- Student and staff exchange
- Study tours, short-term and/or faculty/dept. led
- Research
- Internships, placements or practical training
- Volunteering
- Island programs
Student mobility

- Significant growth in outbound mobility, in 2014:
  - 31,846 students in Australian institutions studying abroad
  - Around 16.5% of completing undergraduates have a mobility experience 2015
    - Approaching 19% in 2016, data to be verified
    - 50% going to Asia

- Strong support from government and institutions

- Mobility is attractive to prospective students and employers, and enhances student experience

- Broadening beyond exchange into short-term mobility and work placements abroad
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
- Self funded – short term
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? Diplomacy? Impact on International Relations
- Global branding and ambassadors
Transnational education (TNE): important or not?

<table>
<thead>
<tr>
<th>Delivery to</th>
<th>Students</th>
<th>% Growth</th>
</tr>
</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>Sub-total of all transnational students**</td>
<td>108,020</td>
<td>110,116</td>
</tr>
<tr>
<td>Grand Total</td>
<td>323,612</td>
<td>328,402</td>
</tr>
</tbody>
</table>

Research Snapshot: Transnational education in the higher education sector, Australian Education International, September 2015
TNE levels of study

Figure 1: Transnational students by level of study, 2014

- Bachelors Degree: 68%
- Masters by Coursework: 21%
- Advanced Dipl/Dipl: 4%
- Doctorate: 2%
- Graduate Diploma & Certificate: 2%
- Masters by Research: 3%
- Other: 0%

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
Transnational education (TNE)

- Diversification of modes of program delivery:
  - Pathways (foundation, diplomas)
  - Mobility between locations
  - Joint masters
  - Joint doctorates

- Major focus on non-award transnational education:
  - Web and app-based online learning, e.g. 3P Learning has over 4.8 million users globally
  - MOOCs
  - Short courses
  - Workplace training
Student support

- Tailored support for international students
- May refer to specialist services
- Orientation and welcome programs
- Working to integrate international and domestic students
- Focus of support may include: safety (personal, fire, water), physical and mental health, cultural adjustment
- ISANA: International Education Association
- Council of International Students Australia
  
  I’m not Australian, but I have an Australian story campaign [www.youtube.com/user/CISATV](http://www.youtube.com/user/CISATV)

- Support state govt. initiatives – Premier’s welcome receptions, airport welcome desks, student centres
Compliance

- Manage the institution’s compliance with the regulatory frameworks
- Experts in interpreting the National Code
- Case management
- Involved in actioning or issuing:
  - eCOE extensions
  - Reduced study loads
  - Intermission requests
  - Discontinuations
  - Change of visa status
  - Statements of completion
  - Releases
  - Unsatisfactory attendance for ELICOS students
  - Provider default
  - Student default inc. non-commencement
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/
**Resources**

**DATA**
Austrade’s Market Information Package (MIP) Orbis: 
Data visualisation tool


**NEWSLETTER SUBSCRIPTIONS**

- ICEF Monitor: [monitor.icef.com](https://monitor.icef.com)
- International Education Update (PIER): [pieronline.org](http://pieronline.org)
- The PIE News: [thepienews.com](http://thepienews.com)
- University World News: [universityworldnews.com](http://universityworldnews.com)

**OTHER**

- IEAA website & SIGs: [www.ieaa.org.au](http://www.ieaa.org.au)
- British Council Education Intelligence: [https://ei.britishcouncil.org/](https://ei.britishcouncil.org/)

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Resources: Twitter

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THANK YOU

lyndell.jacka@idp.com
o.fortescue@cqu.edu.au
bronte.neyland@vu.edu.au