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INTERNATIONAL EDUCATION ESSENTIALS

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James Cook University

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Australian Government Department of Education and Training
PART 1: THE BIG PICTURE
What is international education?

- International student recruitment
- International admissions
- Learning Abroad / 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
- Marketing and communication
- Sponsors
- International research
International education - 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 is the industry important?

- Soft diplomacy
- Enhance a nation’s international standing
- Contributes to a dynamic, multicultural community
- Income: a successful export industry
- Supports 240,000 jobs nationally in Australia
- Employers harness the benefits of international students
- Indirect benefits to other industries, incl. tourism and hospitality

Employers harness the benefits of international students

Income: a successful export industry

Supports 240,000 jobs nationally in Australia
The 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”
2012: Introduction of Streamlined Visa Processing (SVP)
2013: Recovery commenced, particularly in Semester 2
2013: New Colombo Plan 2014: Pilot program launched
2014: New Colombo Plan expanded
      SVP replaced by Simplified Student Visa Framework (SSVF)
2017: Modernisation of the National Code for implementation from 1 January 2018
Over 5 million international tertiary students in 2016

- China: 866,072 (6% growth)
- India: 301,406 (17% growth)
- Germany: 119,088 (2% growth)
- South Korea: 104,992 (-3% growth)
- Nigeria: 95,731 (4% growth)
- France: 90,543 (4% growth)
- Kazakhstan: 90,187 (15% growth)
- Saudi Arabia: 90,178 (5% growth)
- Viet Nam: 82,159 (21% growth)
- Ukraine: 77,263 (13% growth)
- Other: 90,178 (5% growth)

World: 3,168,274 (6% growth)

Source: UNESCO UIS
Top ten international student destinations

Over 5 million international tertiary students in 2016

- USA: 971,417
- UK: 432,001
- Australia: 335,512
- France: 245,349
- Germany: 244,575
- Russian Federation: 243,752
- Canada: 189,478
- Japan: 143,457
- China: 137,527
- Malaysia: 124,133
- Other: 2,018,692

Growth on previous year:
- USA: 7%
- UK: 0%
- Australia: 14%
- France: 2%
- Germany: 7%
- Russian Federation: 8%
- Canada: 10%
- Japan: 9%
- China: 12%
- Malaysia: 11%
- Other: 5%

World: 6%

Source: UNESCO UIS
English speaking destinations: new student trends

Year on year % change in student visas issued by study destination*

* USA 2016 visa data not shown as it is not comparable to previous years due to changes in visa policy and processes; alternative source - Open Doors data is shown

Data based on Australia and NZ – onshore and offshore only, UK - offshore, non-EU only, Canada and US – total

Sources: Australia DIBP, Canada CIC, NZ Department of Labour (Immigration), UK Home Office, US IIE – Open Doors

Slide developed by Lyndell Jacka, IDP Education
## Competitor destinations and targets

<table>
<thead>
<tr>
<th>Country</th>
<th>Target</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>Forecasts vs. Targets</td>
<td>2025</td>
</tr>
<tr>
<td>NZ</td>
<td>Increase economic value to $6billion (revised up from $5billion in 2018)</td>
<td>2025</td>
</tr>
<tr>
<td>Canada</td>
<td>Double number of international students to 450k – <strong>ACHIEVED IN DEC 2017</strong></td>
<td>2022</td>
</tr>
<tr>
<td>China</td>
<td>Attract 500k international students – <strong>LIKELY TO BE ACHIEVED IN 2018</strong></td>
<td>2020</td>
</tr>
<tr>
<td>Japan</td>
<td>Double number of foreign students to 300k – <strong>265K in MAY 2017</strong></td>
<td>2020</td>
</tr>
<tr>
<td>Malaysia</td>
<td>Attract 250k international students</td>
<td>2025</td>
</tr>
<tr>
<td>Russia</td>
<td>Triple international student enrolments to 710k</td>
<td>2025</td>
</tr>
<tr>
<td>UK</td>
<td>Increase non-EU enrolments by 55,000 additional students</td>
<td>2020</td>
</tr>
<tr>
<td>Germany</td>
<td>Attract 350k international students – <strong>ACHIEVED</strong></td>
<td>2020</td>
</tr>
<tr>
<td>South Korea</td>
<td>Host 200k visiting students – <strong>ON TRACK WITH 142K IN 2018</strong></td>
<td>2023</td>
</tr>
<tr>
<td>France</td>
<td>Increase foreign HE enrolments to 20% of total enrolments (approx. 470k)</td>
<td>2025</td>
</tr>
<tr>
<td>Turkey</td>
<td>Host 200k international students. <strong>REVISED UP TO 350K W/O A TIMEFRAME</strong></td>
<td>2022</td>
</tr>
<tr>
<td>Ireland</td>
<td>Increase foreign student enrolment in HE by 33% and ELT by 25%</td>
<td>2020</td>
</tr>
</tbody>
</table>

Sources: Education Target Reports from each Government - New Zealand, Canada, China, Japan, Malaysia, Ireland and Russia. 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
How many international students in Australia?

<table>
<thead>
<tr>
<th>Country</th>
<th>2016</th>
<th>2017</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>156,795</td>
<td>184,318</td>
<td>18%</td>
</tr>
<tr>
<td>India</td>
<td>59,823</td>
<td>68,124</td>
<td>14%</td>
</tr>
<tr>
<td>Nepal</td>
<td>18,651</td>
<td>28,485</td>
<td>53%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>23,446</td>
<td>25,942</td>
<td>11%</td>
</tr>
<tr>
<td>Brazil</td>
<td>19,530</td>
<td>24,237</td>
<td>24%</td>
</tr>
<tr>
<td>Vietnam</td>
<td>22,431</td>
<td>23,642</td>
<td>5%</td>
</tr>
<tr>
<td>South Korea</td>
<td>21,873</td>
<td>22,337</td>
<td>2%</td>
</tr>
<tr>
<td>Thailand</td>
<td>19,139</td>
<td>19,464</td>
<td>2%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>14,769</td>
<td>15,634</td>
<td>6%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>13,961</td>
<td>14,303</td>
<td>2%</td>
</tr>
<tr>
<td>Others</td>
<td>192,698</td>
<td>200,502</td>
<td>4%</td>
</tr>
<tr>
<td><strong>World</strong></td>
<td><strong>553,086</strong></td>
<td><strong>623,029</strong></td>
<td><strong>13%</strong></td>
</tr>
</tbody>
</table>
How many international students in Australia?

<table>
<thead>
<tr>
<th>Country</th>
<th>January - July 2017</th>
<th>January - July 2018</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>164,592</td>
<td>187,547</td>
<td>14%</td>
</tr>
<tr>
<td>India</td>
<td>63,967</td>
<td>79,996</td>
<td>25%</td>
</tr>
<tr>
<td>Nepal</td>
<td>24,883</td>
<td>37,887</td>
<td>52%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>24,276</td>
<td>24,853</td>
<td>2%</td>
</tr>
<tr>
<td>Brazil</td>
<td>20,021</td>
<td>23,142</td>
<td>16%</td>
</tr>
<tr>
<td>Vietnam</td>
<td>21,975</td>
<td>22,565</td>
<td>3%</td>
</tr>
<tr>
<td>South Korea</td>
<td>20,293</td>
<td>19,907</td>
<td>-2%</td>
</tr>
<tr>
<td>Thailand</td>
<td>18,061</td>
<td>16,698</td>
<td>-8%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>14,586</td>
<td>15,162</td>
<td>4%</td>
</tr>
<tr>
<td>Colombia</td>
<td>11,970</td>
<td>14,330</td>
<td>20%</td>
</tr>
<tr>
<td>Others</td>
<td>178,492</td>
<td>184,901</td>
<td>4%</td>
</tr>
<tr>
<td>World</td>
<td>563,116</td>
<td>626,988</td>
<td>11%</td>
</tr>
</tbody>
</table>
There are always more enrolments than students because many students enrol in more than one course.
International Student Enrolments in Australia by Education Sector

- Higher Education
- VET
- ELICOS
- Schools
- Non-award

January - July 2017
January - July 2018
Looking forward with data

Australian data sources include:

- **Students** – a cumulative count of human beings
- **Enrolments** – a cumulative count of all course enrolments
- **Commencements** – a cumulative count of new course enrolments

Growth rates for January - July 2018 (compared to January - July 2017):

<table>
<thead>
<tr>
<th></th>
<th>Students</th>
<th>Enrolments</th>
<th>Commencements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Growth</td>
<td>11%</td>
<td>11%</td>
<td>6%</td>
</tr>
</tbody>
</table>

#aiec2018
Looking forward with data

Visa data:
• Lodgements – applications for visas
• Grants – visas granted

Growth rates for January - July 2018 (compared to January - July 2017):
All lodgements 10%; offshore lodgements 3%  
All grants 13%; offshore grants 3%
Where do students study in Australia?

### Distribution of international student enrolments in Australia in 2017

<table>
<thead>
<tr>
<th>State / Territory</th>
<th>Share (%)</th>
<th>Enrolments</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Major Cities</td>
<td>Regional area</td>
<td>Major Cities Area</td>
</tr>
<tr>
<td>NSW</td>
<td>98.8%</td>
<td>1.2%</td>
<td>292,972</td>
</tr>
<tr>
<td>VIC</td>
<td>99.1%</td>
<td>0.9%</td>
<td>247,331</td>
</tr>
<tr>
<td>QLD</td>
<td>94.0%</td>
<td>6.0%</td>
<td>115,605</td>
</tr>
<tr>
<td>WA</td>
<td>99.6%</td>
<td>0.4%</td>
<td>53,468</td>
</tr>
<tr>
<td>SA</td>
<td>99.8%</td>
<td>0.2%</td>
<td>35,657</td>
</tr>
<tr>
<td>ACT</td>
<td>100.0%</td>
<td>0.0%</td>
<td>16,910</td>
</tr>
<tr>
<td>TAS</td>
<td>0.0%</td>
<td>100.0%</td>
<td></td>
</tr>
<tr>
<td>NT</td>
<td>0.0%</td>
<td>100.0%</td>
<td></td>
</tr>
<tr>
<td>Australia</td>
<td>96.9%</td>
<td>3.1%</td>
<td>761,943</td>
</tr>
</tbody>
</table>

*Research Snapshot: International students in regional areas, Australian Department of Education and Training, May 2018*
Where do students study in Australia?

### Top ten regions for international student enrolments in 2017

<table>
<thead>
<tr>
<th>State / Territory</th>
<th>Region*</th>
<th>Enrolments</th>
<th>Share (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAS</td>
<td>Hobart</td>
<td>6,702</td>
<td>27.8%</td>
</tr>
<tr>
<td>QLD</td>
<td>Cairns</td>
<td>2,685</td>
<td>11.1%</td>
</tr>
<tr>
<td>NT</td>
<td>Darwin</td>
<td>2,423</td>
<td>10.0%</td>
</tr>
<tr>
<td>QLD</td>
<td>Toowoomba</td>
<td>2,086</td>
<td>8.6%</td>
</tr>
<tr>
<td>QLD</td>
<td>Townsville</td>
<td>1,944</td>
<td>8.1%</td>
</tr>
<tr>
<td>NSW</td>
<td>Richmond - Tweed</td>
<td>1,458</td>
<td>6.0%</td>
</tr>
<tr>
<td>TAS</td>
<td>Launceston and North East</td>
<td>1,385</td>
<td>5.7%</td>
</tr>
<tr>
<td>NSW</td>
<td>New England and North West</td>
<td>1,351</td>
<td>5.6%</td>
</tr>
<tr>
<td>VIC</td>
<td>Ballarat</td>
<td>1,029</td>
<td>4.3%</td>
</tr>
<tr>
<td>VIC</td>
<td>Geelong</td>
<td>416</td>
<td>1.7%</td>
</tr>
<tr>
<td><strong>Other locations</strong></td>
<td></td>
<td><strong>2,649</strong></td>
<td><strong>11.0%</strong></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>24,128</strong></td>
<td><strong>100.0%</strong></td>
</tr>
</tbody>
</table>

* SA4 regions as derived from the ABS Australian Statistical Geography Standard.

Research Snapshot: International students in regional areas, Australian Department of Education and Training, May 2018
Where do students study in Australia?

Research Snapshot: International students in regional areas, Australian Department of Education and Training, May 2018
Educational partnerships matter

Distribution of international agreements 2007

Year of Survey
2007

Total number of agreements:
5,168

Number of Agreements
1

759
Educational partnerships matter

Distribution of international agreements 2007

Total number of agreements: 5,168
Educational partnerships matter
Educational partnerships matter

Distribution of international agreements 2009

Year of Survey
2009

Total number of agreements:
5,555

Number of Agreements
1 777
Educational partnerships matter
Educational partnerships matter

Distribution of international agreements 2014

Year of Survey
2014

Total number of agreements: 8,511
Educational partnerships matter

Distribution of international agreements 2016

Year of Survey
2016

Total number of agreements:
9,171
Educational partnerships matter

Distribution of international agreements 2016

Year of Survey
2016

Total number of agreements:
9,171

Country: China (People's Republic of)
Number of Agreements: 1,402
Educational partnerships matter

Distribution of international agreements 2016

Year of Survey
2016

Total number of agreements:
9,171

Country: United States of America
Number of Agreements: 996
### Higher education delivery to international students

<table>
<thead>
<tr>
<th>Delivery to</th>
<th>students</th>
<th>% Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>International students in Australia</td>
<td>253,757</td>
<td>278,718</td>
</tr>
<tr>
<td>Students at offshore campuses</td>
<td>40,502</td>
<td>40,130</td>
</tr>
<tr>
<td>Students in offshore partnership programs</td>
<td>60,899</td>
<td>64,581</td>
</tr>
<tr>
<td>Students offshore in distance education</td>
<td>8,140</td>
<td>7,707</td>
</tr>
<tr>
<td>Sub-total of all offshore students</td>
<td>109,541</td>
<td>112,418</td>
</tr>
<tr>
<td>Grand total</td>
<td>363,298</td>
<td>391,136</td>
</tr>
</tbody>
</table>

Australian campuses offshore include:

- **RMIT University** (Vietnam)
- **Curtin University** (Malaysia, Singapore & UAE)
- **James Cook University** (Singapore)
- **Monash University** (India, Italy, Malaysia & South Africa)
- **Murdoch University** (Singapore & UAE)
- **University of Newcastle** (Singapore)
- **University of Wollongong** (UAE)
- **Swinburne University** (Malaysia).
Where is transnational higher education delivered to?

Offshore students by country (2011 - 2016)

- Singapore
- Malaysia
- China
- Viet Nam
- Hong Kong
Transnational education: VET

OFFSHORE VET ENROLMENTS IN 2017

36,765
FROM 45 OFFSHORE LOCATIONS

TOP 5 LOCATIONS FOR VET DELIVERY OFFSHORE

- China
- Fiji
- Hong Kong
- Mauritius
- Kuwait
- Other

57% VET Offshore enrolments in China
(21% down from 2016)

43% VET Offshore enrolments in other locations
(21% up from 2016)

Research Snapshot: Transnational education in the VET sector (coming soon)
Australian Department of Education and Training, October 2018

#aiec2018
Australian student mobility in higher education precedes the New Colombo Plan, but NCP is now a key part of the landscape.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>NCP Budget</td>
<td>$5,372,000</td>
<td>$10,958,000</td>
<td>$19,577,000</td>
<td>$28,215,000</td>
<td>$51,083,000</td>
<td>$50,933,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Calendar year</th>
<th>2013</th>
<th>2014 NCP (pilot)</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>NCP Scholarships</td>
<td>42</td>
<td>69</td>
<td>100</td>
<td>104</td>
<td>120</td>
<td></td>
</tr>
<tr>
<td>NCP Mobility grants (students)</td>
<td>1,361</td>
<td>3,171</td>
<td>5,487</td>
<td>7,441</td>
<td>13,654</td>
<td></td>
</tr>
<tr>
<td>Australian undergraduates abroad</td>
<td>17,812</td>
<td>19,700</td>
<td>24,715</td>
<td>27,320</td>
<td></td>
<td></td>
</tr>
<tr>
<td>All Australian students abroad</td>
<td>29,487</td>
<td>31,912</td>
<td>38,144</td>
<td>44,045</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

15,058 18,340 20,906 24,763 29,487 31,912 38,144 44,045
PART 2: GOVERNANCE
The politics of international education in Australia

The Hon Dan Tehan MP
Minister for Education

Senator the Hon Michaelia Cash
Minister for Small and Family Business, Skills and Vocational Education
The politics of international education in Australia

Senator the Hon Simon Birmingham
Minister for Trade, Tourism & Investment
Austrade’s 2025 International Education Strategy
Marketing and brand strategy

Senator the Hon Marise Payne
Minister for Foreign Affairs
The politics of international education in Australia

The Hon David Coleman MP
Minister for Immigration, Citizenship and Multicultural Affairs

The Hon Karen Andrews MP
Minister for Industry, Science and Technology
Federal Government strategies

- National Strategy for International Education
  - Strengthening the fundamentals
  - Making transformative partnerships
  - Competing globally
- Australia Global Alumni Engagement Strategy 2016-2020
- National Innovation and Science Agenda
- 17 person National Council for International Education
  - 6 Federal Ministers
  - 11 non-ministerial members
Industry peak bodies
Export income from international education, by sector and state/territory, 2017

### Export income, education, $million

<table>
<thead>
<tr>
<th>Education sector</th>
<th>2017</th>
<th>% change from 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Higher education</td>
<td>20,702</td>
<td>18%</td>
</tr>
<tr>
<td>VET</td>
<td>5,227</td>
<td>19%</td>
</tr>
<tr>
<td>ELICOS</td>
<td>1,565</td>
<td>18%</td>
</tr>
<tr>
<td>Schools</td>
<td>1,307</td>
<td>14%</td>
</tr>
<tr>
<td>Non-award</td>
<td>1,042</td>
<td>16%</td>
</tr>
<tr>
<td>Other students*</td>
<td>420</td>
<td>7%</td>
</tr>
<tr>
<td>Sub-total students</td>
<td>30,263</td>
<td>17%</td>
</tr>
<tr>
<td>Other services#</td>
<td>550</td>
<td>10%</td>
</tr>
<tr>
<td><strong>Grand total</strong></td>
<td>30,813</td>
<td>17%</td>
</tr>
</tbody>
</table>

*Incorporates export income derived from education consultancies, other services and royalties

#Other students incorporates New Zealanders and students supported by DFAT or Defence

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Research Snapshot, Australian Department of Education and Training, June 2018
Legalisation and policies

- Education Services for Overseas Students (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
National Code 2018

Key changes include:

- Written agreement to include more detail on a student’s course and refund arrangements;
- Greater emphasis on the arrangements for the care and welfare of students under the age of 18;
- Increased guidance for providers re: the granting of student transfers;
- Enhanced support for students to fulfil visa requirements, particularly around course attendance and progress; and
- Clarification of institution’s obligations re: maintaining agent records.
Simplified Student Visa Framework

- All providers under one framework
- Change from immigration risk rating to evidence level
- Evidence level is a combination of the education provider and the country of citizenship
- Financial and English language capacity requirements are determined by evidence level
Increasing the value of international education

The value might be measured by:

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

- **International Student Experience**
  - Accommodation
  - Acceptance within Australia
  - Workplace exploitation

- **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

- **Policy settings**
  - Student visa
  - Post-study work rights
  - Skilled migration

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

- **Market volatility**
  - How have Brexit and Trump affected international education in their countries?
  - Saudi Arabia’s response to Canadian tweet
DATA
- Austrade’s Market Information Package (MIP) Orbis: Data visualisation tool
- Data and Research, Australian Department of Education and Training: internationaleducation.gov.au/research
- Dept of Immigration and Border Protection: Student visa statistics

NEWSLETTER SUBSCRIPTIONS
- ICEF Monitor: monitor.icef.com
- International Education Update (PIER): pieronline.org
- The PIE News: thepienews.com
- University World News: universityworldnews.com
- Bob Johnson Consulting: http://www.bobjohnsonconsulting.com/

OTHER
- IEAA website & SIGs: www.ieaa.org.au
- British Council Education Intelligence: https://ei.britishcouncil.org/
Resources: Twitter

@ACPET_national
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@CampusReview
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