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# INTERNATIONAL EDUCATION ESSENTIALS

**Bronte Neyland** (Chair)

Director

Victoria University International

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# INTERNATIONAL EDUCATION ESSENTIALS

## **Melissa Banks**

Pro Vice Chancellor, International  
James Cook University

## **Steve Nerlich**

Director, International Research & Analysis Unit, Research & Economic Group  
Australian Government Department of Education and Training



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## PART 1: THE BIG PICTURE

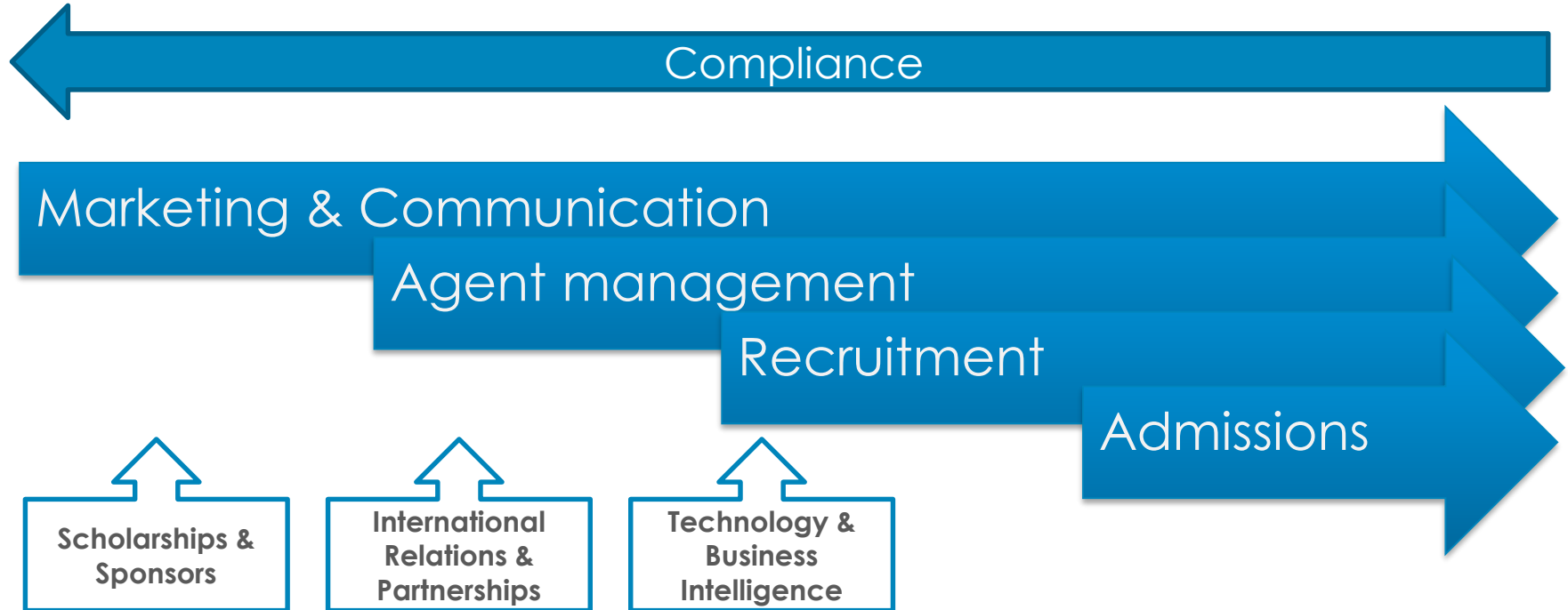


# What is international education?

- 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

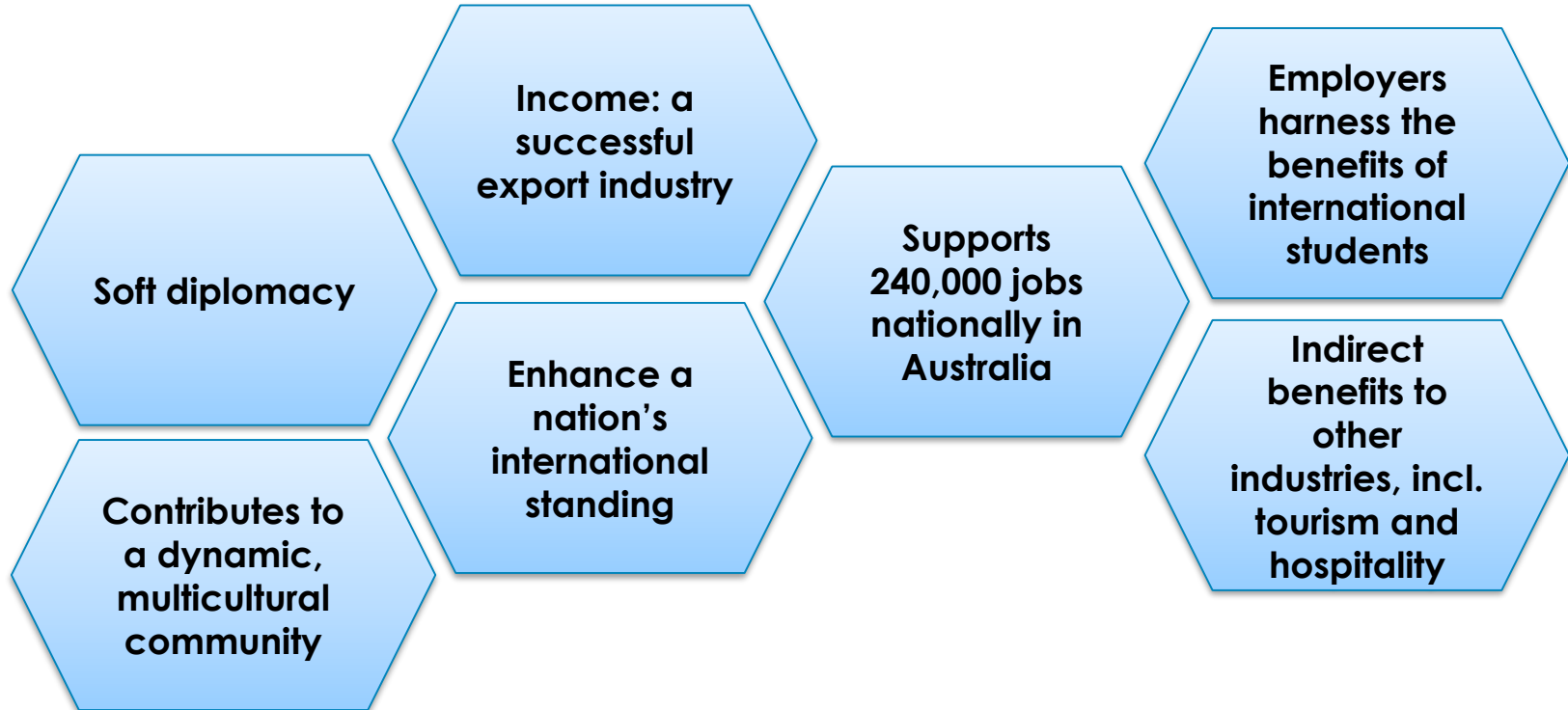


Image: IDP



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?

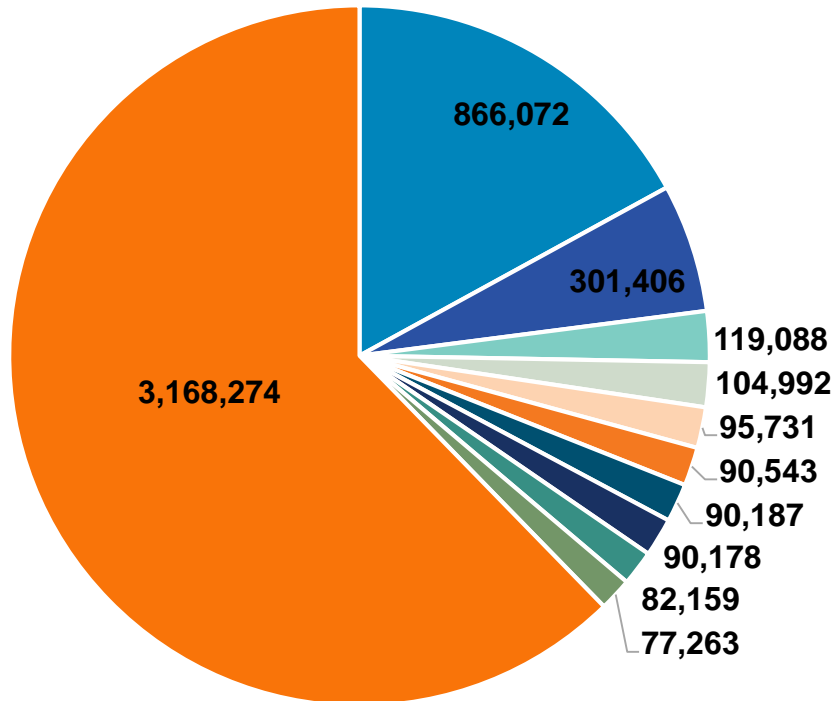


# The history of International education in Australia

- 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
- 2016: Release of National Strategy for International Education 2025  
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



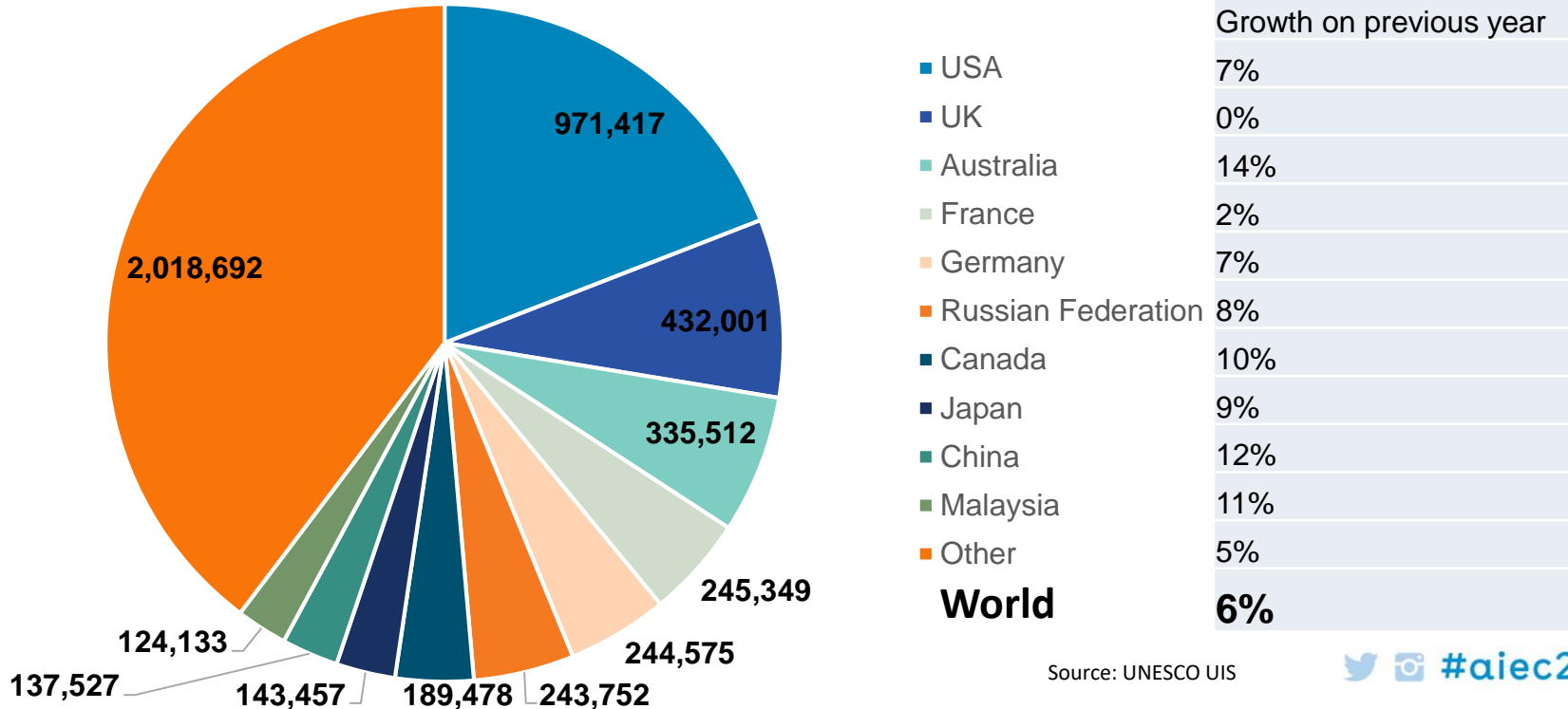
- China
- India
- Germany
- South Korea
- Nigeria
- France
- Kazakhstan
- Saudi Arabia
- Viet Nam
- Ukraine
- Other

**World**

Growth on previous year

China	6%
India	17%
Germany	2%
South Korea	-3%
Nigeria	4%
France	4%
Kazakhstan	15%
Saudi Arabia	5%
Viet Nam	21%
Ukraine	13%
Other	5%
<b>World</b>	<b>6%</b>

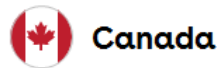
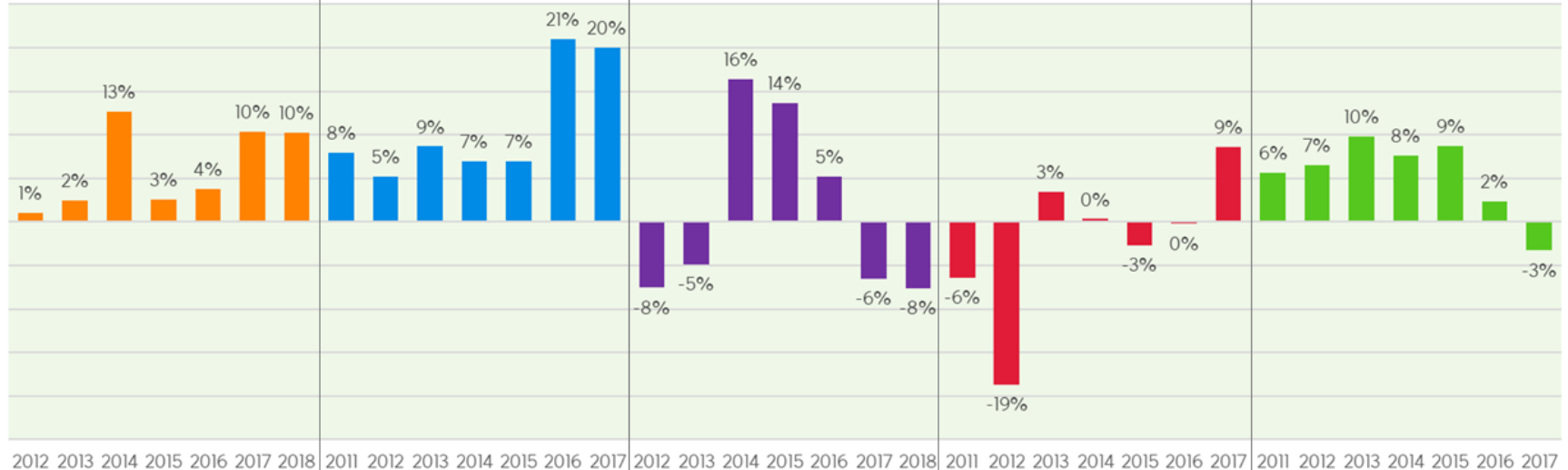
## Over 5 million international tertiary students in 2016



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

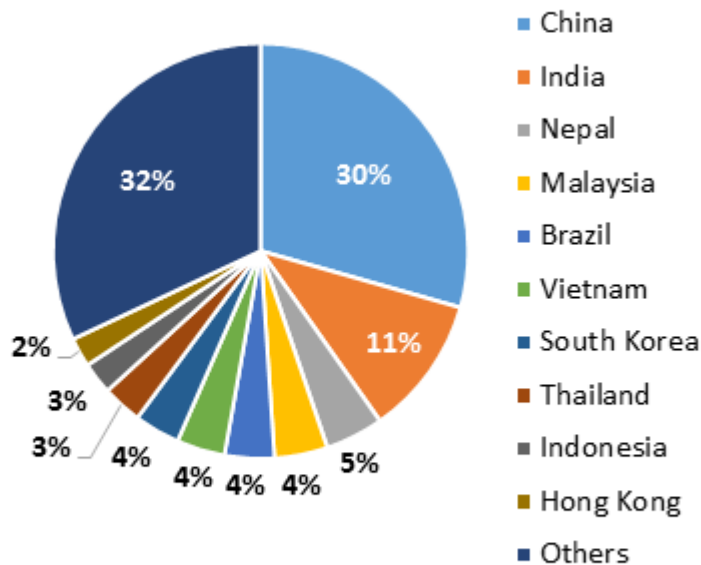
# Competitor destinations and targets

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

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?

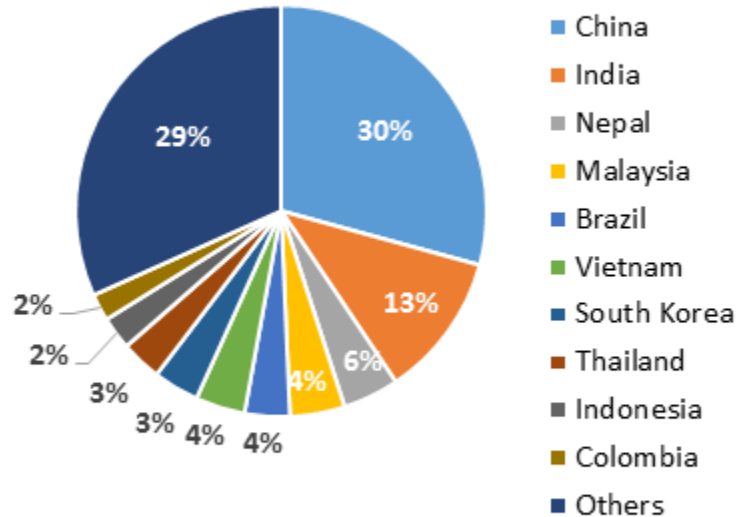
**Students: 2017**



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

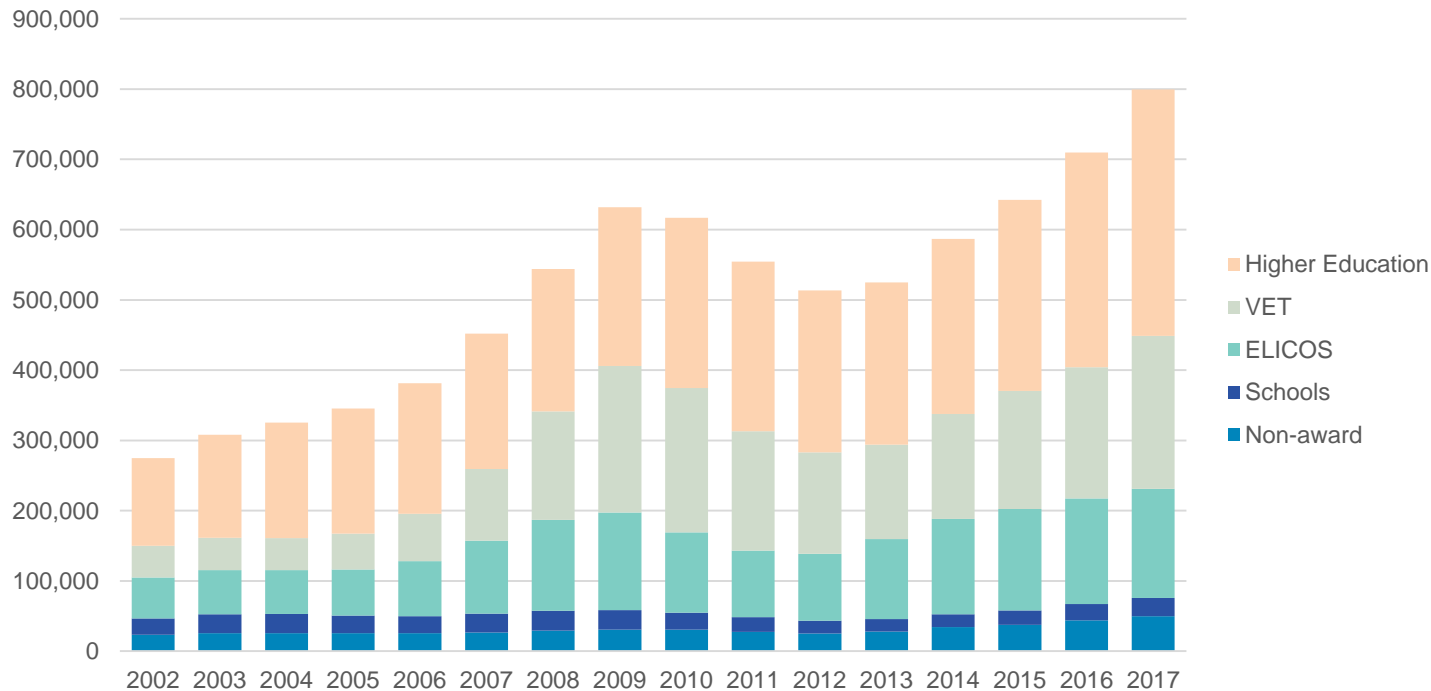
# How many international students in Australia?

Students: January - July 2018



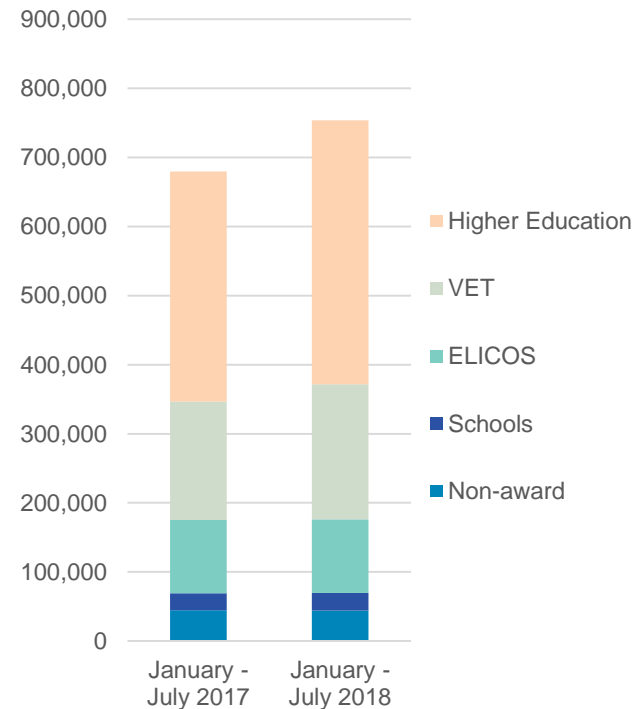
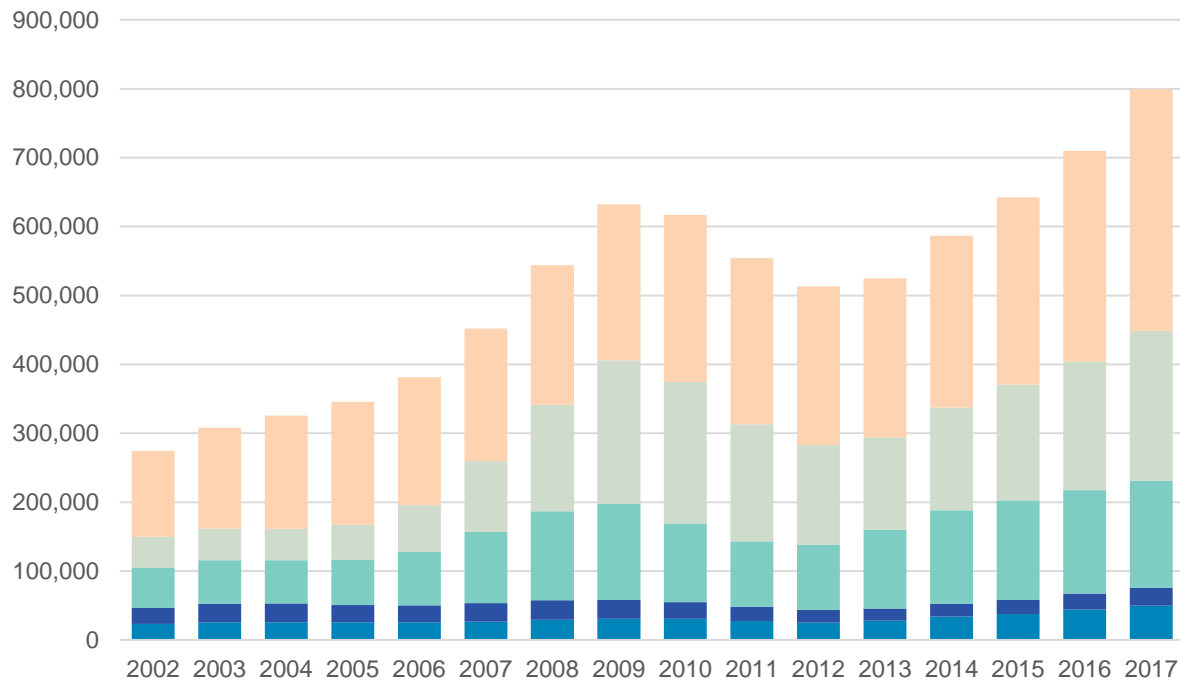
	January - July 2017	January - July 2018	% change
China	164,592	187,547	14%
India	63,967	79,996	25%
Nepal	24,883	37,887	52%
Malaysia	24,276	24,853	2%
Brazil	20,021	23,142	16%
Vietnam	21,975	22,565	3%
South Korea	20,293	19,907	-2%
Thailand	18,061	16,698	-8%
Indonesia	14,586	15,162	4%
Colombia	11,970	14,330	20%
Others	178,492	184,901	4%
<b>World</b>	<b>563,116</b>	<b>626,988</b>	<b>11%</b>

# International Student Enrolments in Australia by Education Sector



There are always more enrolments than students because many students enrol in more than one course.

# International Student Enrolments in Australia by Education Sector





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):

## Students



## Enrolments



## Commencements



## 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					
State / Territory	Share (%)		Enrolments		Total
	Major Cities area	Regional area	Major Cities Area	Regional area	
NSW	98.8%	1.2%	292,972	3,585	296,557
VIC	99.1%	0.9%	247,331	2,326	249,657
QLD	94.0%	6.0%	115,605	7,367	122,972
WA	99.6%	0.4%	53,468	228	53,696
SA	99.8%	0.2%	35,657	89	35,746
ACT	100.0%	0.0%	16,910		16,910
TAS	0.0%	100.0%		8,103	8,103
NT	0.0%	100.0%		2,430	2,430
<b>Australia</b>	<b>96.9%</b>	<b>3.1%</b>	<b>761,943</b>	<b>24,128</b>	<b>786,071</b>

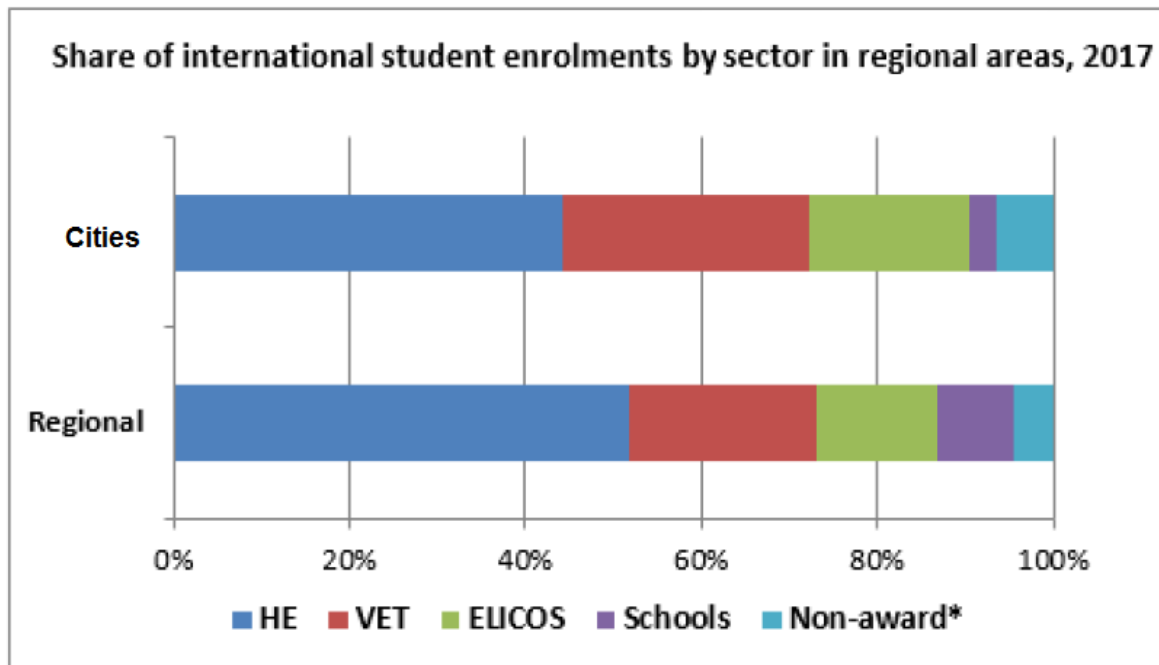
# Where do students study in Australia?

Top ten regions for international student enrolments in 2017			
State / Territory	Region*	Enrolments	Share (%)
TAS	Hobart	6,702	27.8%
QLD	Cairns	2,685	11.1%
NT	Darwin	2,423	10.0%
QLD	Toowoomba	2,086	8.6%
QLD	Townsville	1,944	8.1%
NSW	Richmond - Tweed	1,458	6.0%
TAS	Launceston and North East	1,385	5.7%
NSW	New England and North West	1,351	5.6%
VIC	Ballarat	1,029	4.3%
VIC	Geelong	416	1.7%
	<i>Other locations</i>	<i>2,649</i>	<i>11.0%</i>
<b>Total</b>		<b>24,128</b>	<b>100.0%</b>

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

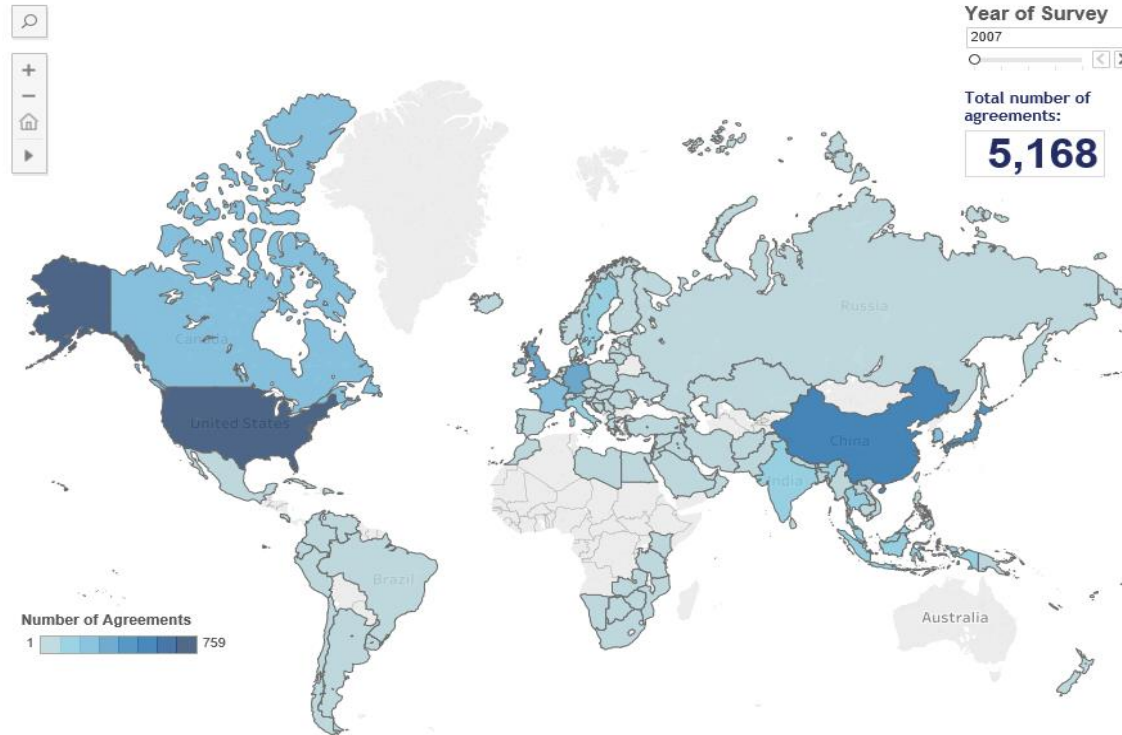
Research Snapshot: International students in regional areas,  
Australian Department of Education and Training, May 2018

# Where do students study in Australia?



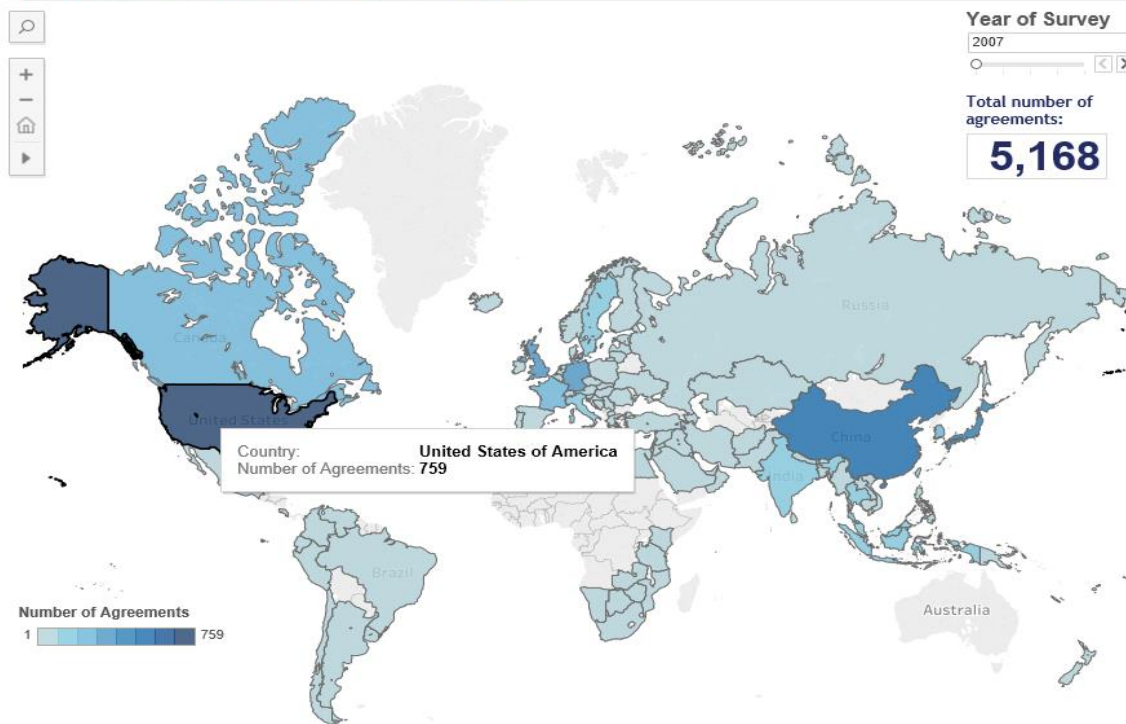
*\* Including foundation and study abroad (exchange program) courses.*

## Distribution of international agreements 2007

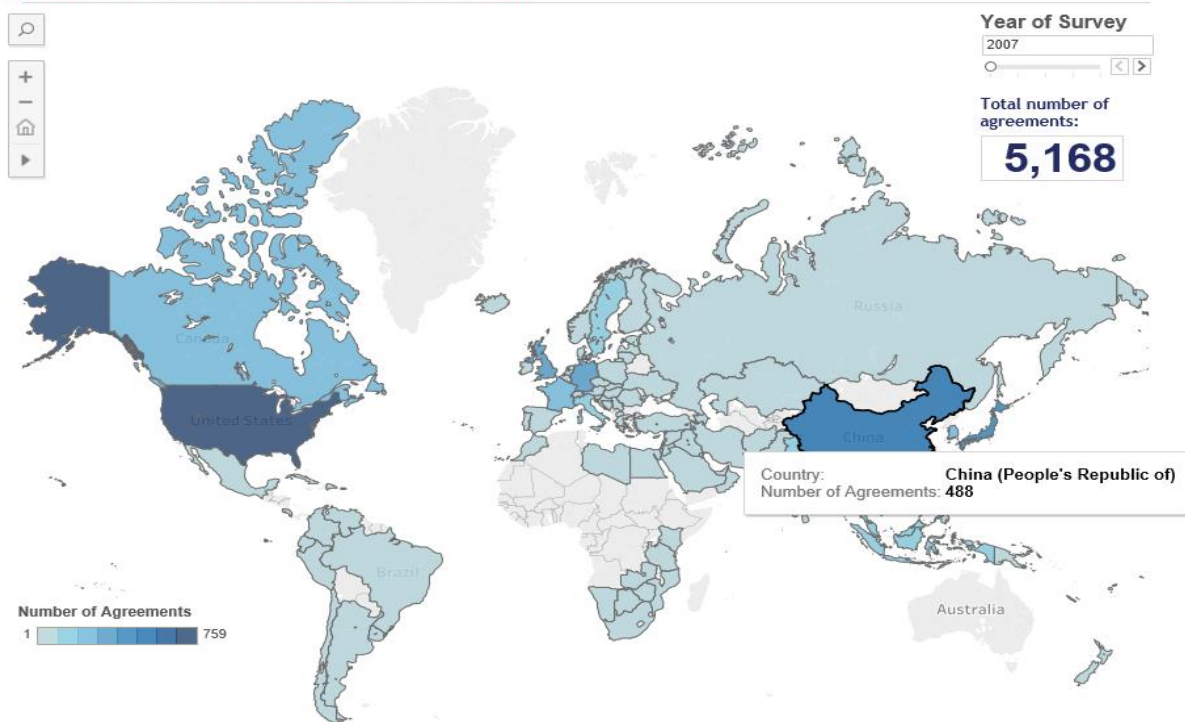




## Distribution of international agreements 2007

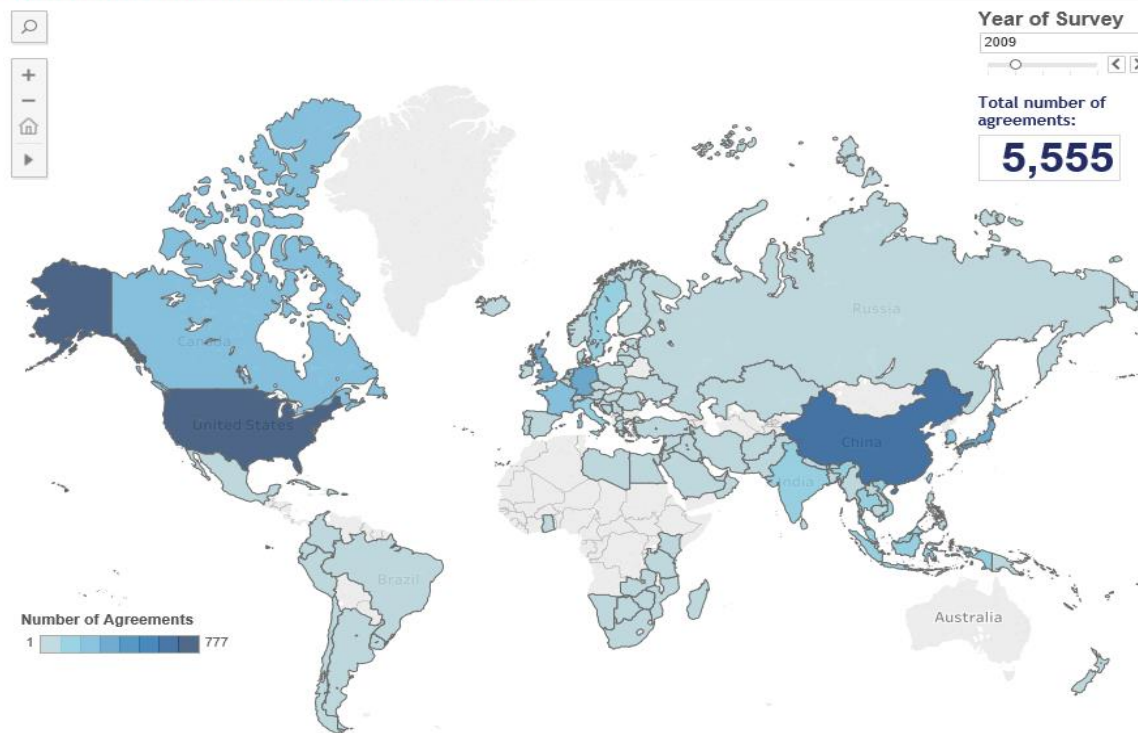


## Distribution of international agreements 2007

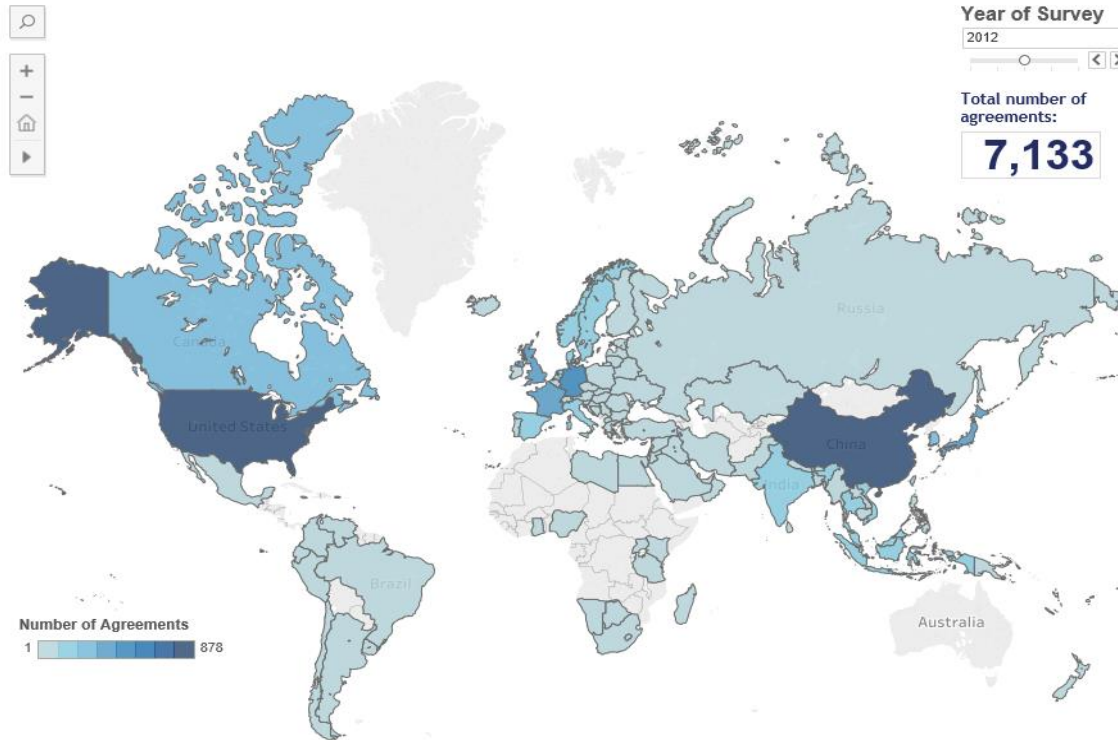




## Distribution of international agreements 2009

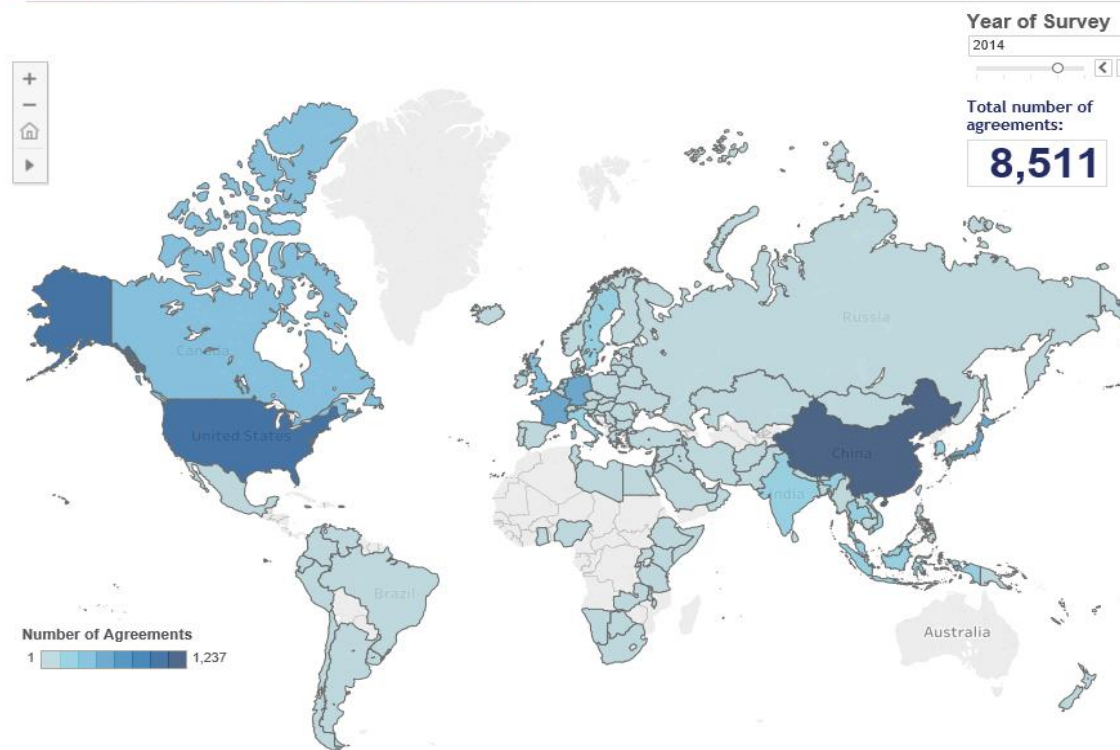


## Distribution of international agreements 2012

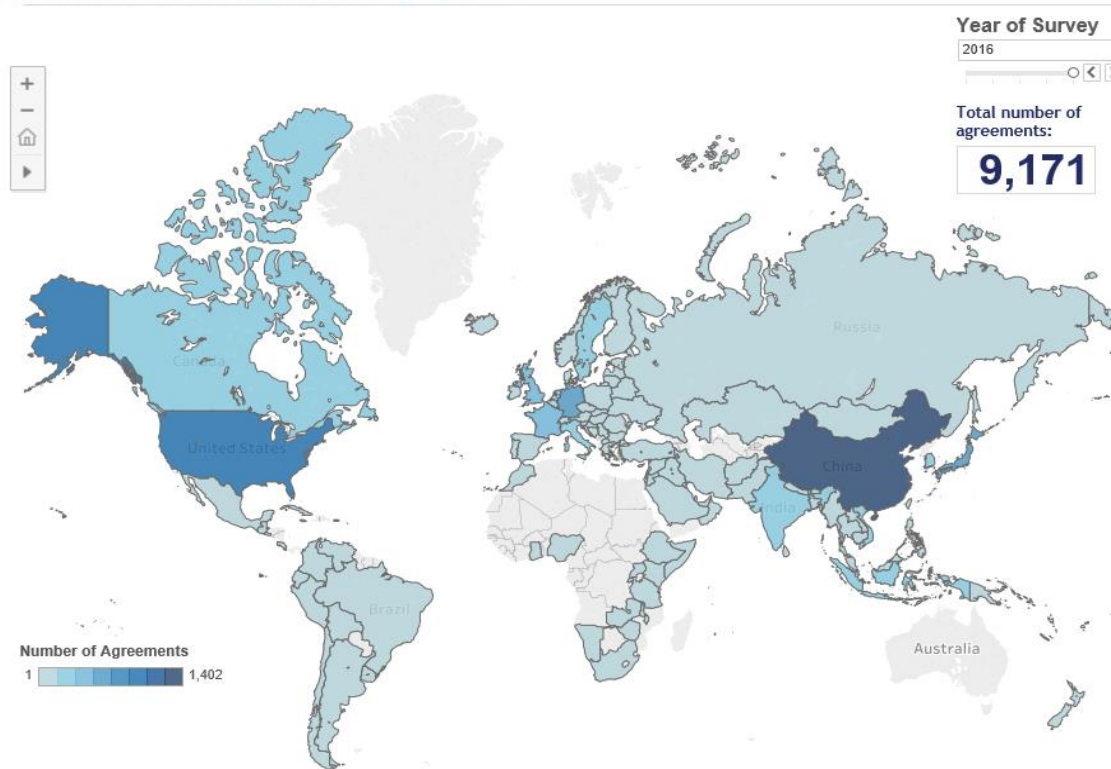


# Educational partnerships matter

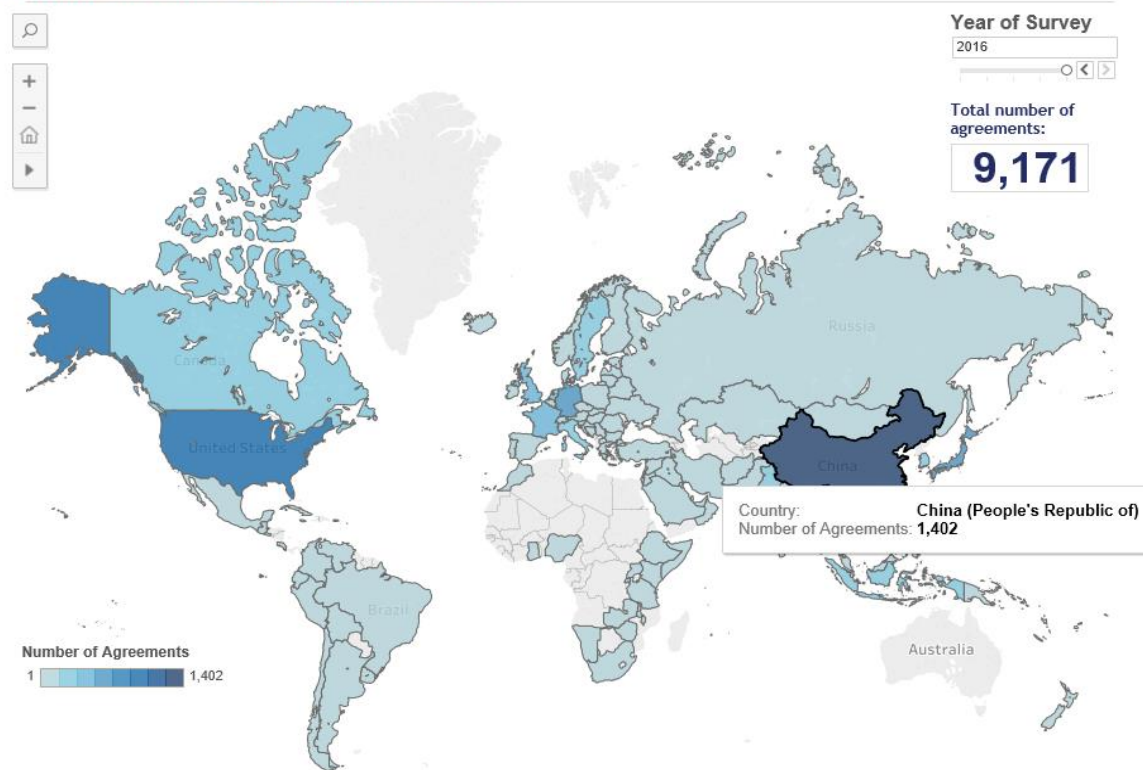
## Distribution of international agreements 2014



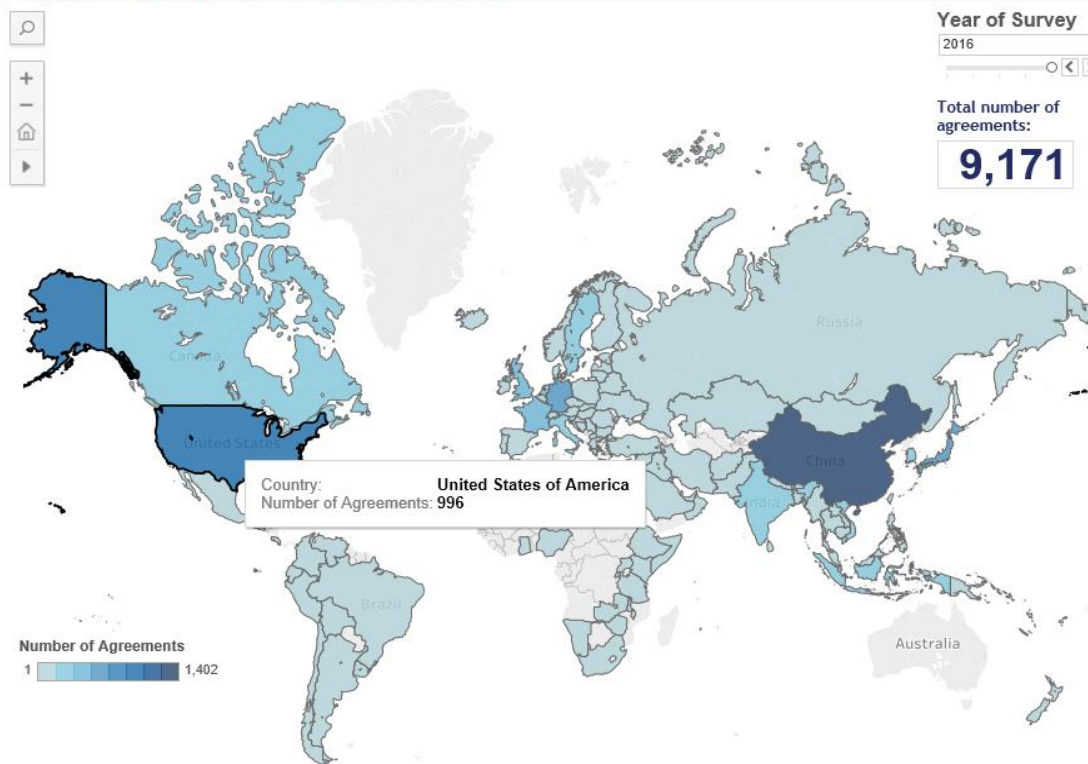
## Distribution of international agreements 2016



## Distribution of international agreements 2016



## Distribution of international agreements 2016





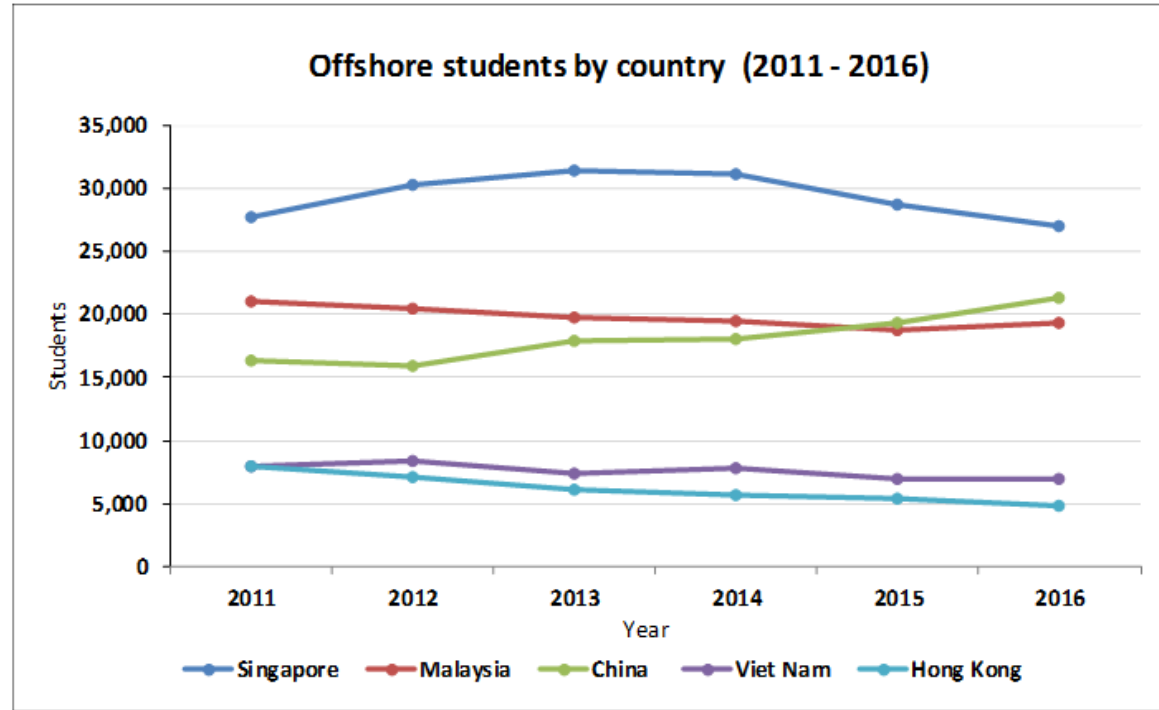
## Higher education delivery to international students

Delivery to	students		% Growth
	2015	2016	2016
<b>International students in Australia</b>	<b>253,757</b>	<b>278,718</b>	<b>9.8%</b>
Students at offshore campuses	40,502	40,130	-0.9%
Students in offshore partnership programs	60,899	64,581	6.0%
Students offshore in distance education	8,140	7,707	-5.2%
<b>Sub-total of all offshore students</b>	<b>109,541</b>	<b>112,418</b>	<b>2.6%</b>
<b>Grand total</b>	<b>363,298</b>	<b>391,136</b>	<b>7.7%</b>

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 VET ENROLMENTS IN 2017

**36,765**

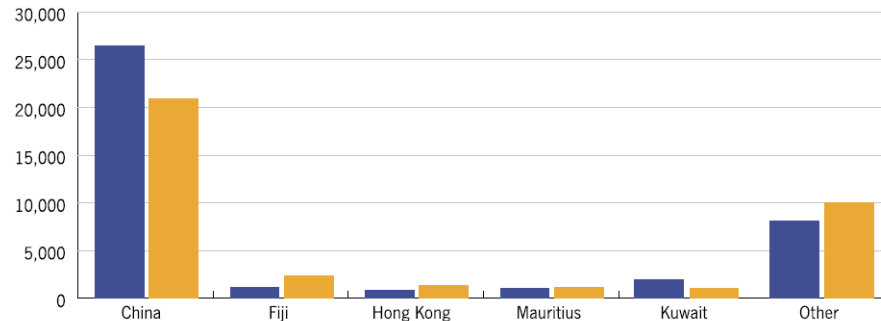
FROM 45 OFFSHORE LOCATIONS

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



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

## TOP 5 LOCATIONS FOR VET DELIVERY OFFSHORE



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

Financial year	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
NCP Budget	\$5,372,000	\$10,958,000	\$19,577,000	\$28,215,000	\$51,083,000	\$50,933,000
Calendar year	2013	2014 NCP (pilot)	2015	2016	2017	2018
NCP Scholarships		42	69	100	104	120
NCP Mobility grants (students)		1,361	3,171	5,487	7,441	13,654
Australian <u>undergraduates abroad</u>	17,812	19,700	24,715	27,320		
All Australian students abroad	29,487	31,912	38,144	44,045		

2009	2010	2011	2012	2013	2014	2015	2016
15,058	18,340	20,906	24,763	29,487	31,912	38,144	44,045

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## PART 2: GOVERNANCE



# The politics of international education in Australia

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**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

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## **The Hon David Coleman MP**

Minister for Immigration, Citizenship and  
Multicultural Affairs



## **The Hon Karen Andrews MP**

Minister for Industry, Science and Technology

- **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





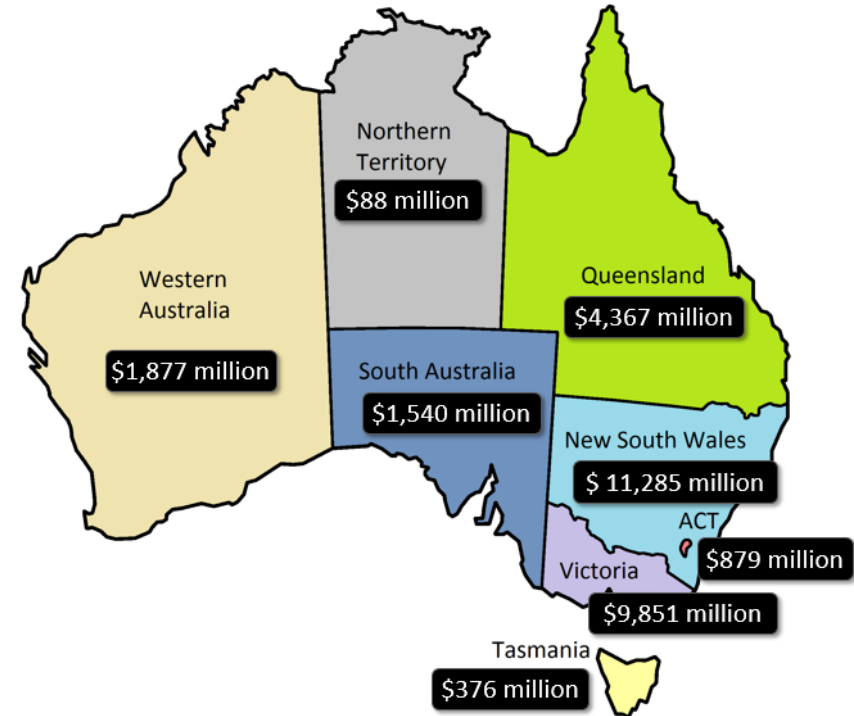
# Export income from international education, by sector and state/territory, 2017

## Export income, education, \$million

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

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

\*Other students incorporates New Zealanders and students supported by DFAT or Defence



- Education Services for Overseas Students (ESOS) Act
- National Code
- Migration Act
- State legislation
- Institutional policies and procedures



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



## 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.

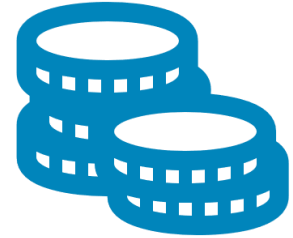


## **Simplified Student Visa Framework**

- 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

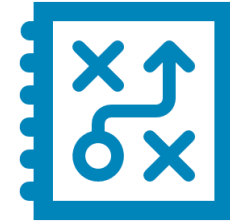
The value might be measured by:

- 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



- **International Student Experience**

- Accommodation
- Acceptance within Australia
- Workplace exploitation



- **Graduate Employability**

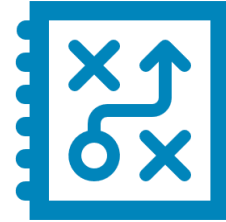
- Quality Indicators of Learning and Teaching (QILT)
- AUIDF International Graduate Outcomes survey (2016)

- **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?)

- **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**

- Political – Economic – Social – Technical – Legal – Environmental
  - 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  
<https://www.austrade.gov.au/australian/education/education-data/mip-orbis>
- Data and Research, Australian Department of Education and Training: [internationaleducation.gov.au/research](http://internationaleducation.gov.au/research)
- Dept of Immigration and Border Protection: Student visa statistics  
<https://www.border.gov.au/about/reports-publications/research-statistics/statistics/study-in-australia>

## NEWSLETTER SUBSCRIPTIONS

- ICEF Monitor: [monitor.icef.com](http://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)
- Bob Johnson Consulting: <http://www.bobjohnsonconsulting.com/>

## OTHER

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

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**THANK YOU**

