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2017 Hobart
Embracing Diversity

Australian International Education Conference
10 – 13 October 2017
Hotel Grand Chancellor
Hobart Tasmania

INTERNATIONAL EDUCATION 101: WHAT YOU SHOULD KNOW

Bronte Neyland, Director, Victoria University International
Lyndell Jacka, Head of Research, IDP Education

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Hobart Tasmania
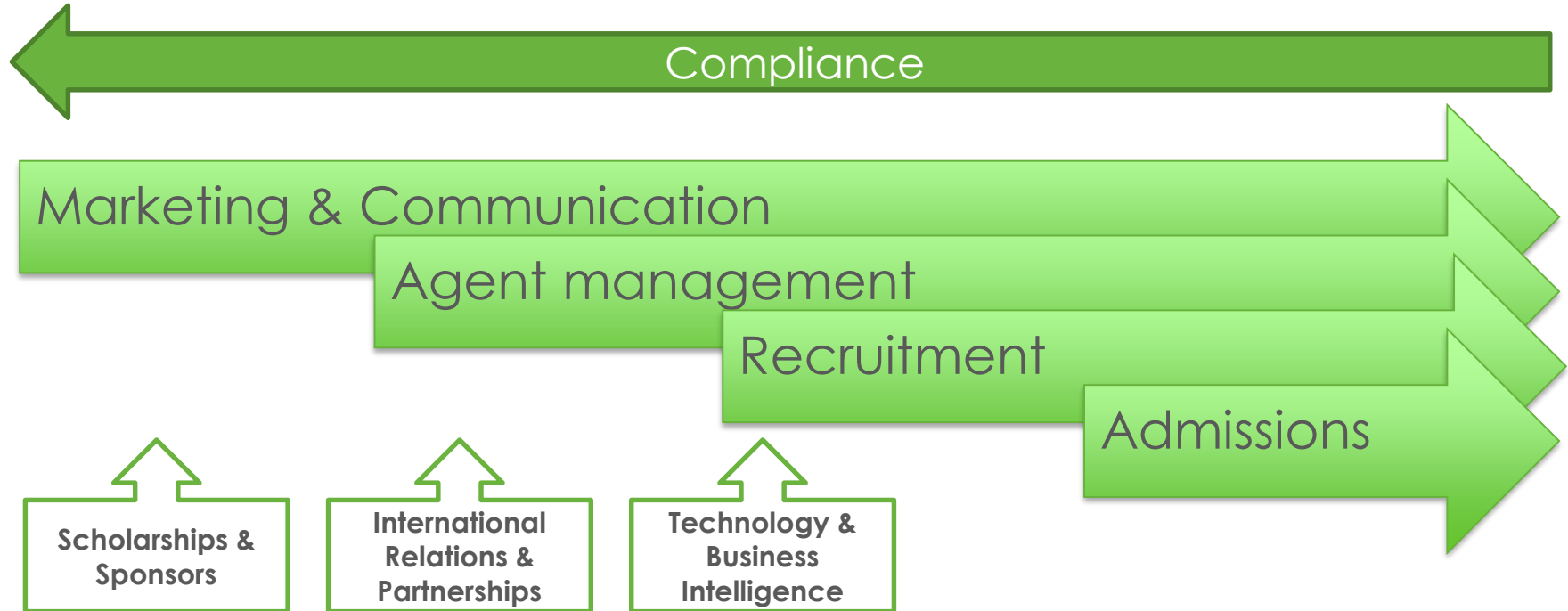
PART 1: THE BIG PICTURE

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
- Marketing and communication
- Sponsors
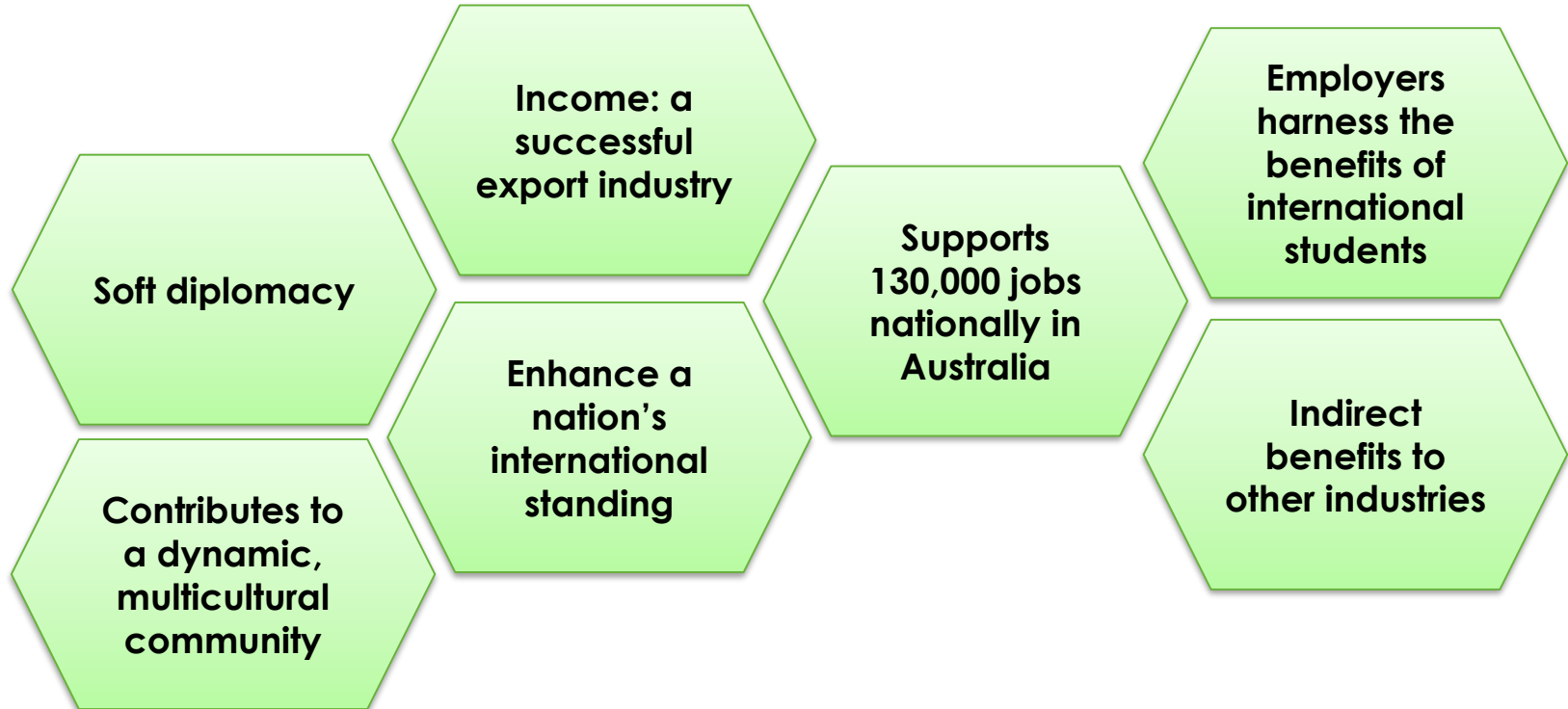- International research

Image: IDP

Recruitment operations

Compliance

Marketing & Communication

Agent management

Recruitment

Admissions

Scholarships & Sponsors

International Relations & Partnerships

Technology & Business Intelligence

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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.
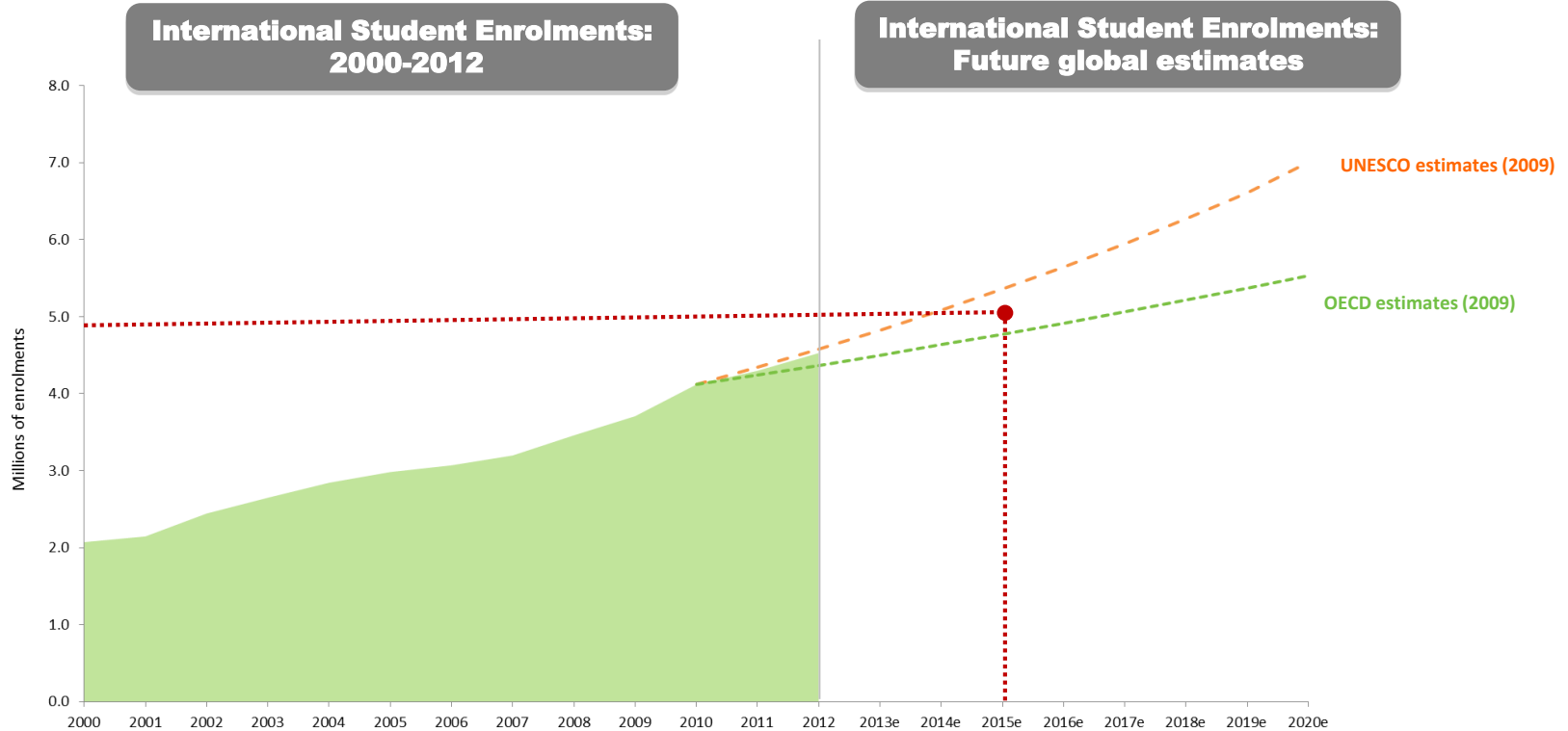
Why does the industry exist?

Income: a successful export industry

Employers harness the benefits of international students

Soft diplomacy

Supports 130,000 jobs nationally in Australia

Enhance a nation's international standing

Contributes to a dynamic, multicultural community

Indirect benefits to other industries

Competitor destinations and targets

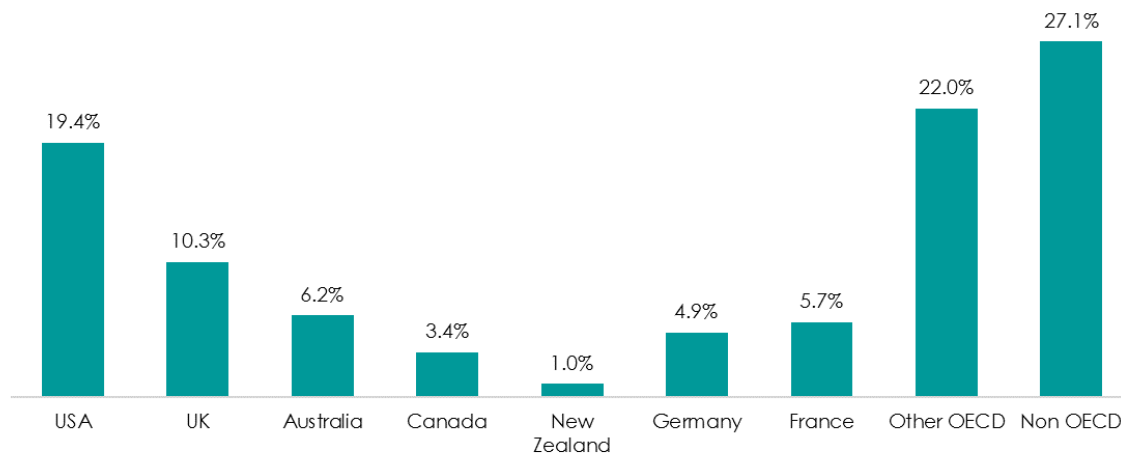| Country	Target	Year
Australia	Double number of international students	2025
NZ	Double economic value to $5b	2025
Canada	Double number of international students to 450k	2022
China	Attract 500k international students (150k HE)	2020
Japan	Double number of foreign students to 300k	2020
Malaysia	Attract 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	2020
France	Increase foreign HE enrolments to 20% of total enrolments (approx. 470k)	2025
Turkey	Host 200k international students	2023
Ireland	Increase foreign student enrolment in HE by 33% and ELT by 25%	2020

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Global growth

International Student Enrolments: 2000-2012

International Student Enrolments: Future global estimates

UNESCO estimates (2009)

OECD estimates (2009)

Millions of enrolments

8.0
7.0
6.0
5.0
4.0
3.0
2.0
1.0
0.0

2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013e 2014e 2015e 2016e 2017e 2018e 2019e 2020e

Education at a Glance 2015, UNESCO and OECD; IDP estimates

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Distribution of foreign students

Distribution of foreign students in tertiary education by country of destination, 2013

Country	Percentage
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

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English speaking destinations: new student trends

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

Australia: 2012: 1%, 2013: 2%, 2014: 13%, 2015: 3%, 2016: 4%, 2017: 10%

Canada: 2011: 8%, 2012: 6%, 2013: 9%, 2014: 9%, 2015: 4%, 2016: 22%

NZ: 2012: -8%, 2013: -5%, 2014: 16%, 2015: 14%, 2016: 5%, 2017: -6%

UK: 2011: -7%, 2012: -19%, 2013: 3%, 2014: 0%, 2015: -3%, 2016: 0%

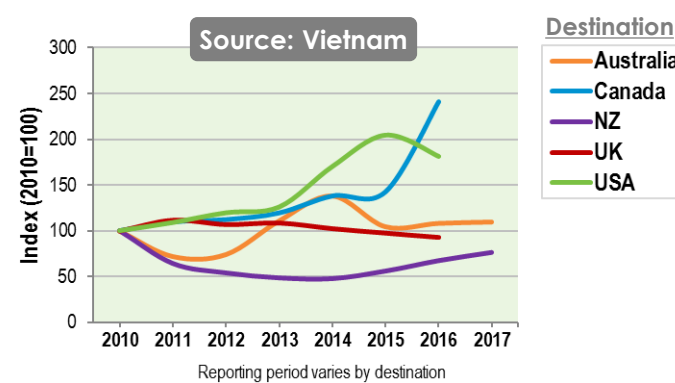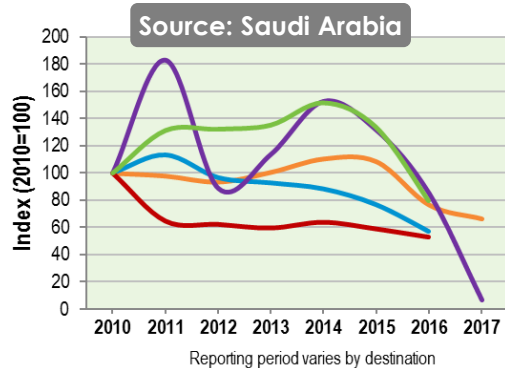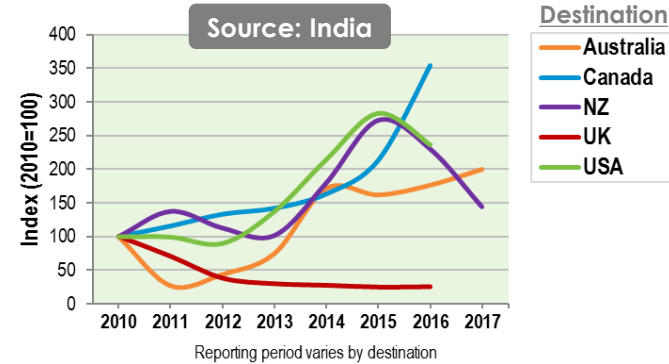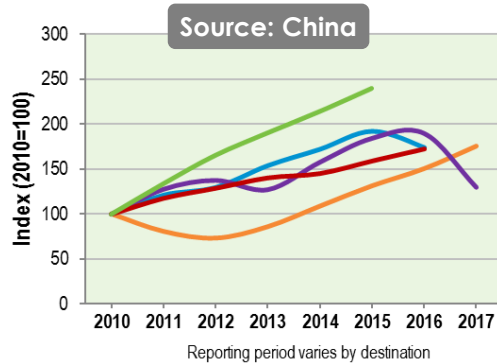*USA*:* 2011: 6%, 2012: 7%, 2013: 10%, 2014: 8%, 2015: 9%, 2016: 2%
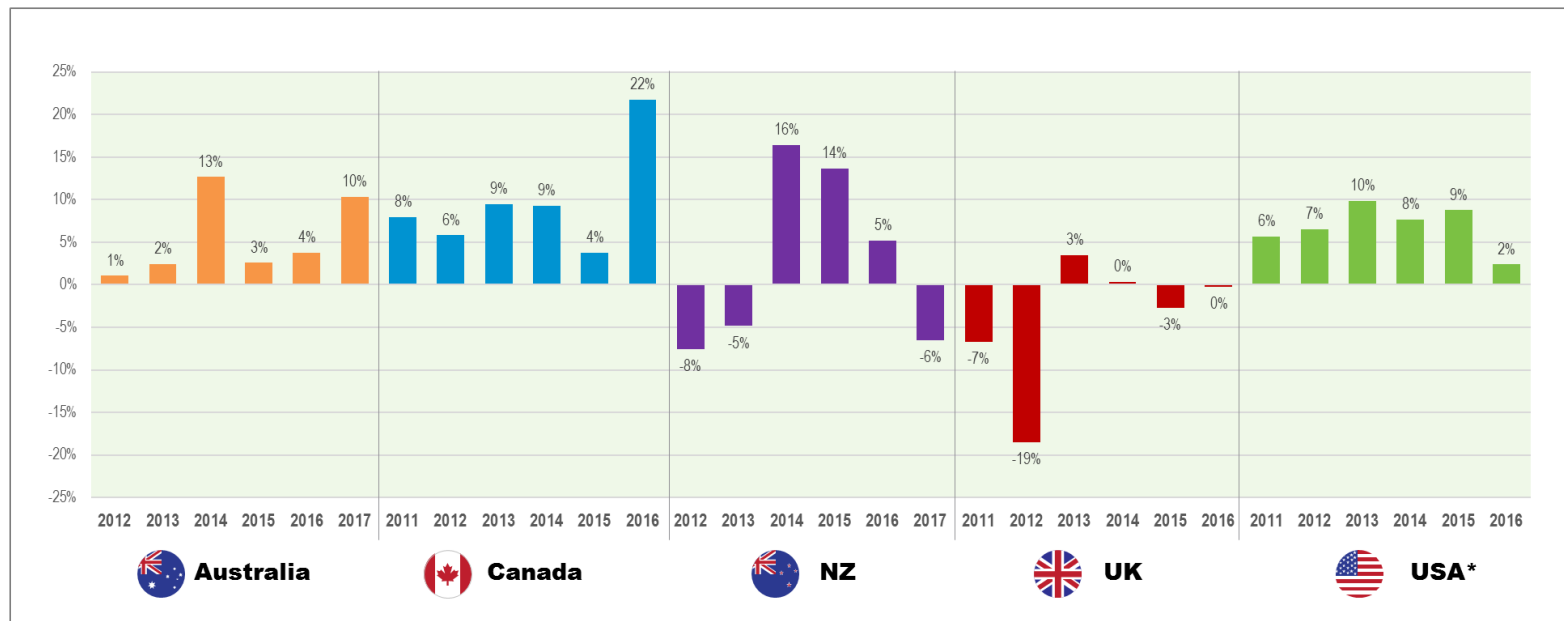
* USA 2016 visa data not shown as it is not comparable to previous years due to changes in visa policy and processes; alternative source - Open Doors data is shown
Data based on Australia and NZ – onshore and offshore only, UK - offshore, non-EU only, Canada and US – total
Sources: Australia DIBP, Canada CIC, NZ Department of Labour (Immigration), UK Home Office, US IIE – Open Doors
Slide developed by Lyndell Jacka, IDP Education

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Visa grants growth: some key source markets

Source: China

Index (2010=100)

Destination
- Australia
- Canada
- NZ
- UK
- USA

Source: India

Index (2010=100)

Destination
- Australia
- Canada
- NZ
- UK
- USA

Reporting period varies by destination

Source: Saudi Arabia

Index (2010=100)

Destination
- Australia
- Canada
- NZ
- UK
- USA

Source: Vietnam

Index (2010=100)

Destination
- Australia
- Canada
- NZ
- UK
- USA

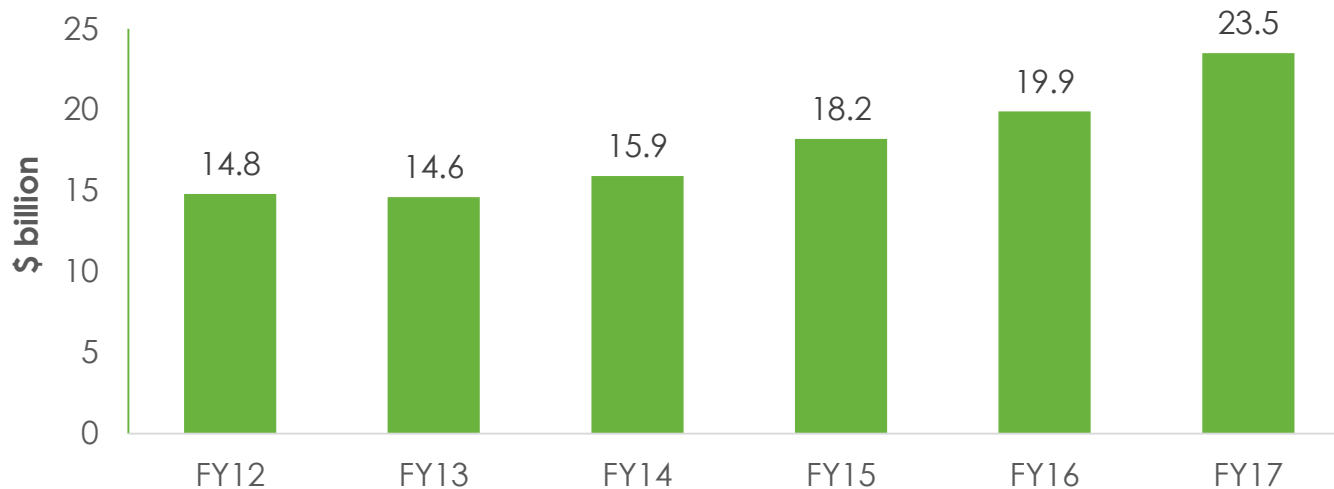Reporting period varies by destination

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

Sources: Australia DIBP, Canada CIC, NZ Immigration, UK Home Office, US Dept. of State
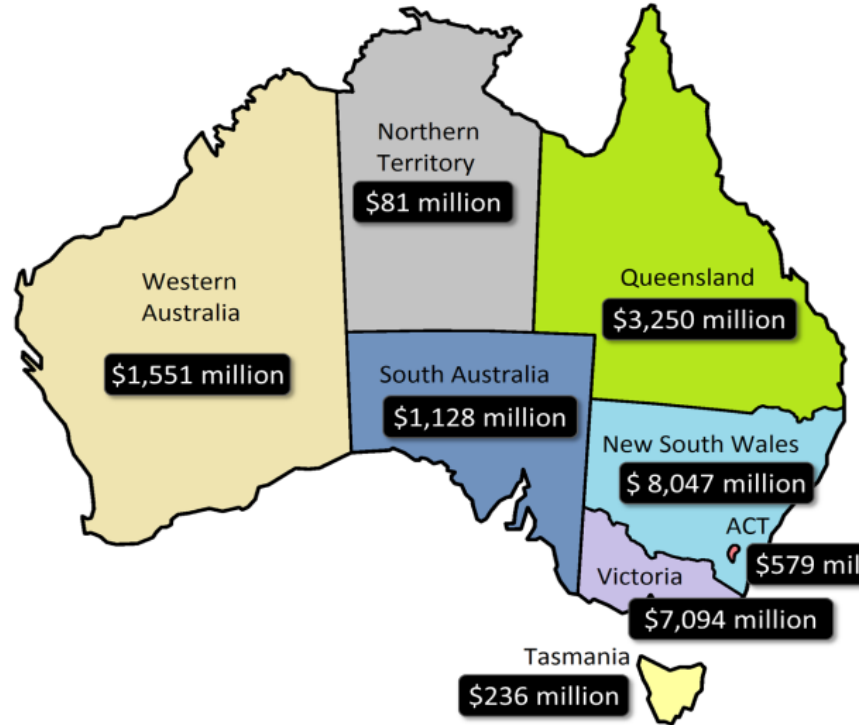Slide developed by Lyndell Jacka, IDP Education

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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)
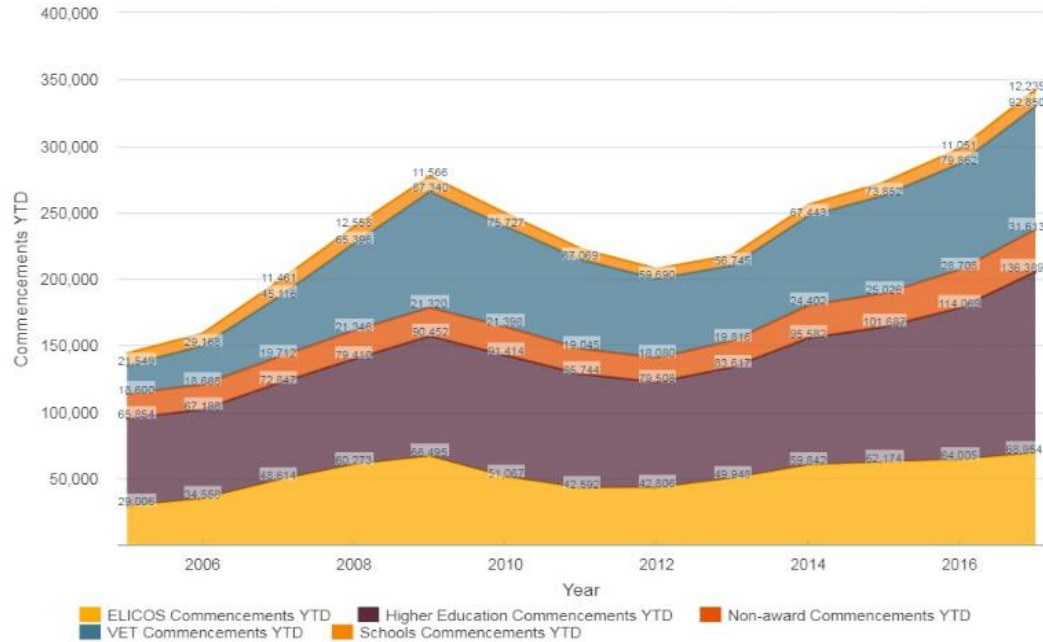2017:   Modernisation of the National Code for implementation from 1 January 2018

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Export income: onshore

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Onshore in Australia: Export income from education services

Bar chart showing $ billion by financial year:
- FY12: 14.8
- FY13: 14.6
- FY14: 15.9
- FY15: 18.2
- FY16: 19.9
- FY17: 23.5

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Australia's commencement trends (YTD, July 2017)

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Year-to-date commencements

All sectors by top 10 nationalities (State/Territory)

NATIONALITY	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	TOTAL
China	36,367	32,268	12,462	6,335	3,573	1,849	95	4,267	97,216
India	8,395	16,774	4,046	1,500	3,474	420	108	300	35,017
Brazil	8,032	1,693	5,096	152	1,251	12	13	24	16,273
Nepal	10,069	2,699	1,376	547	589	263	147	47	15,737
South Korea	6,196	2,659	3,141	454	897	112	24	248	13,731
Malaysia	2,835	6,829	1,118	649	1,570	232	21	125	13,379
Thailand	7,485	3,438	1,333	116	410	51	21	84	12,938
Vietnam	4,269	5,482	1,106	802	938	113	46	150	12,906
Colombia	3,017	3,842	2,523	115	662	15	5	57	10,236
USA	3,868	1,332	2,163	134	537	62	7	96	8,199
Others	38,214	29,793	20,181	4,210	10,700	1,076	496	1,739	106,409
Total	128,747	106,809	54,545	15,014	24,601	4,205	983	7,137	342,041

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Austrade 2020 forecast

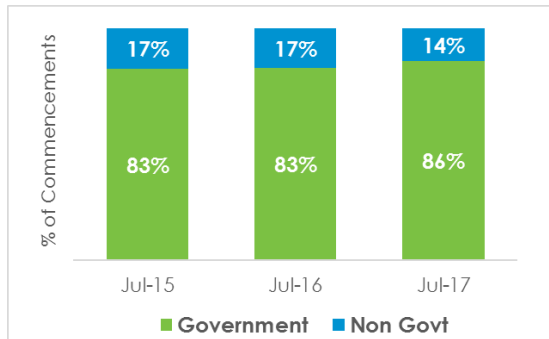| Nationality	2002	Rank	2013	Rank		2020 Forecast	Rank
China	44,570	1	150,116	1		China	1
India	10,974	10	49,265	2		India	2
South Korea	17,348	4	27,580	3		Pakistan	3
Vietnam	3,828	13	26,015	4		Philippines	4
Thailand	14,280	7	21,762	5		Indonesia	5
Malaysia	17,177	5	21,208	6		Vietnam	6
Brazil	3,819	14	17,554	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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Year-to-date commencements by sector

July YTD commencements - Sectors by top 15 nationalities

	TOTAL	Schools	ELICOS	VET	Higher Ed.	Non-award
1	**China**	China	China	India	China	China
2	**India**	Vietnam	Brazil	South Korea	India	USA
3	**Brazil**	Germany	Colombia	China	Nepal	Germany
4	**Nepal**	Hong Kong	Thailand	Thailand	Vietnam	UK
5	**South Korea**	Italy	Japan	Brazil	Malaysia	Norway
6	**Malaysia**	South Korea	South Korea	Malaysia	Pakistan	Nepal
7	**Thailand**	Japan	Taiwan	Nepal	Indonesia	Malaysia
8	**Vietnam**	Brazil	India	Taiwan	Hong Kong	Canada
9	**Colombia**	Papua New Guinea	Vietnam	Indonesia	Sri Lanka	Japan
10	**USA**	Thailand	Malaysia	Colombia	Singapore	Denmark
11	**Taiwan**	Cambodia	Spain	Vietnam	Bangladesh	France
12	**Indonesia**	Switzerland	Nepal	Italy	South Korea	Hong Kong
13	**Japan**	Malaysia	Italy	Philippines	Philippines	Sweden
14	**Hong Kong**	Taiwan	Chile	Japan	Saudi Arabia	Netherlands
15	**Pakistan**	Norway	Hong Kong	Hong Kong	Taiwan	Vietnam

Year-to-date commencements by provider type

Higher Education

	Jul-15	Jul-16	Jul-17
Non Govt	17%	17%	14%
Government	83%	83%	86%

% of Commencements

■ Government ■ Non Govt

VET

	Jul-15	Jul-16	Jul-17
Non Govt	81%	84%	86%
Government	19%	16%	14%

% of Commencements

■ Government ■ Non Govt

ELICOS

	Jul-15	Jul-16	Jul-17
Non Govt	79%	81%	82%
Government	21%	19%	18%

% of Commencements

■ Government ■ Non Govt

Schools

	Jul-15	Jul-16	Jul-17
Non Govt	35%	34%	33%
Government	65%	66%	67%

% of Commencements

■ Government ■ Non Govt

Non-award

	Jul-15	Jul-16	Jul-17
Non Govt	12%	15%	16%
Government	88%	85%	84%

% of Commencements

■ Government ■ Non Govt

Australian Department of Education and Training, YTD July 2016
Courtesy: Austrade's Market Information Package

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Transnational education (TNE): important or not?

Higher education delivery to international students			
	Students		**% Growth**
Delivery to	**2014**	**2015**	**2015**
International students in Australia	234,433	253,757	8.2%
Students at offshore campuses	100,062	96,004	-4.1%
Distance education students* offshore	13,065	13,537	3.6%
Sub-total of all transnational students	*113,127*	*109,541*	*-3.2%*
Grand Total	**347,560**	**363,298**	**4.5%**

* includes online learning and correspondence of students studying award courses wholly overseas.

Research Snapshot: Transnational education in the higher education sector,
Australian Department of Education and Training, October 2016

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TNE levels of study

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Transnational students by level of study, 2015

- Masters by Coursework, 20.1%
- Advanced Dipl/Dipl, 4.4%
- Doctorate, 2.4%
- Grad Dip & Cert, 2.4%
- Masters by Research, 0.3%
- Other, 2.9%
- Bachelors Degree, 66.9%

Research Snapshot: Transnational education in the higher education sector, October 2016

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Figure 2: Transnational students by country (2010-2015)

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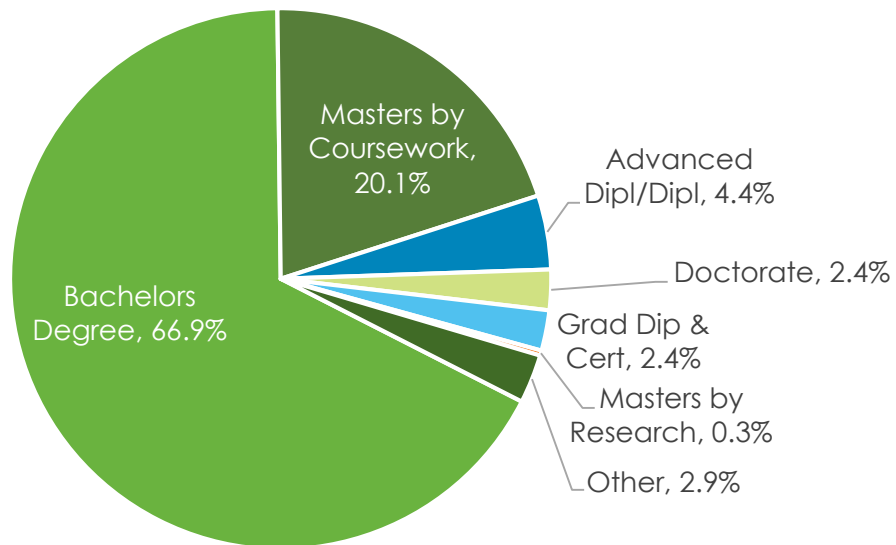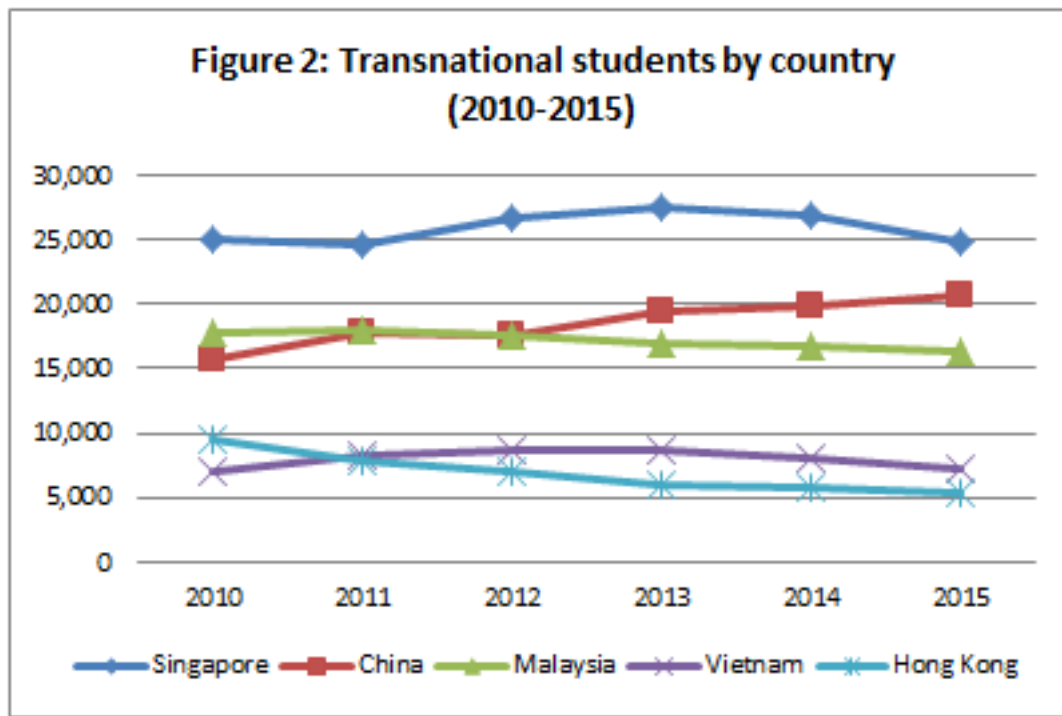
- **Diversification of modes of program delivery:**
  - Pathways (foundation, diplomas)
  - Mobility between locations
  - Joint masters
  - Joint doctorates

- **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

PART 2: THE POLITICAL CONTEXT

The politics of international education in Australia

Senator the Hon Simon Birmingham
Minister for Education & Training
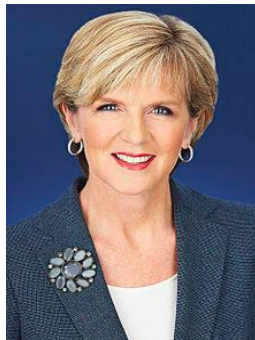
The Hon Julie Bishop MP
Minister for Foreign Affairs
New Colombo Plan

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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 Hon Karen Andrews MP

Assistant Minister for Vocational Education and Skills

Industry peak bodies

- **National Strategy for International Education**

  - Strengthening the fundamentals

  - Making transformative partnerships

  - 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"

- **Australia Global Alumni Engagement Strategy 2016-2020**

- **National Innovation and Science Agenda**

Legalisation and policies

- Education Services for Overseas Student (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.

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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

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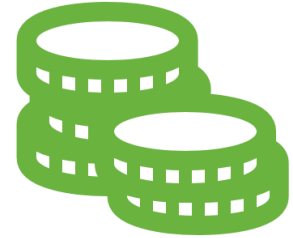
- **International Student Experience**
  - Accommodation
  - Acceptance within Australia
  - Online vs face-to-face

- **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?)

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Challenges

- **Visa 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?

Resources

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
- 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
- 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

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