

COLLABORATIVE HORIZONS

Partner Conference 2024

Global Strategy and Partners

Carolyn Chong, Deputy Vice-Chancellor (Global and Engagement)

1 February 2024

Federation University Australia acknowledges the Custodians of the lands and waters where our campuses are located and recognise their continuing responsibilities to care for country at these sites of teaching and learning. We pay our respects to Elders past and present and extend our respects to all Aboriginal and Torres Strait Islander First Nations Peoples.

The Aboriginal Traditional Custodians of the lands and waters where our campuses, centres and field stations are located include:

Wimmera:	Wotjobaluk, Jaadwa, Jadawadjali, Wergaia, Jupagulk
Ballarat:	Wadawurrung
Berwick:	Boon Wurrung
Gippsland:	Gunai Kurnai
Nanya Station:	Mutthi Mutthi and Barkindji
Brisbane:	Turrbal and Jagera

Agenda

1. Global Market
2. Global and Australia Demand
3. Tightening of Policy Settings
4. Changing Landscape of Education in Australia
5. Federation University Global Strategy and Partners

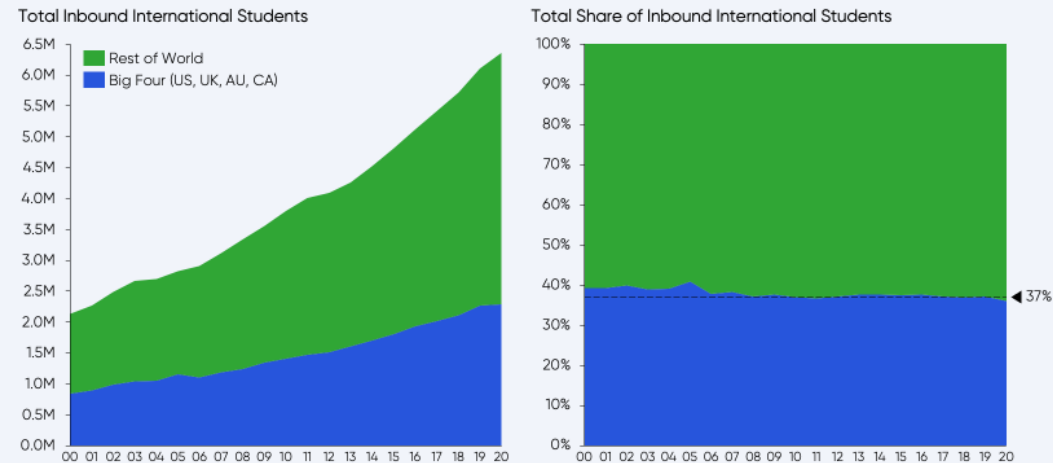


Global Market

Recent data from HoloniQ forecasts that approximately 9 million students, representing more than \$500B in annual direct expenditure, will travel for study outside their home country by 2030. Over the next 30 years, the world is expected to produce 1 billion post-secondary graduates, many of whom will be interested in an English-based degree or credential.

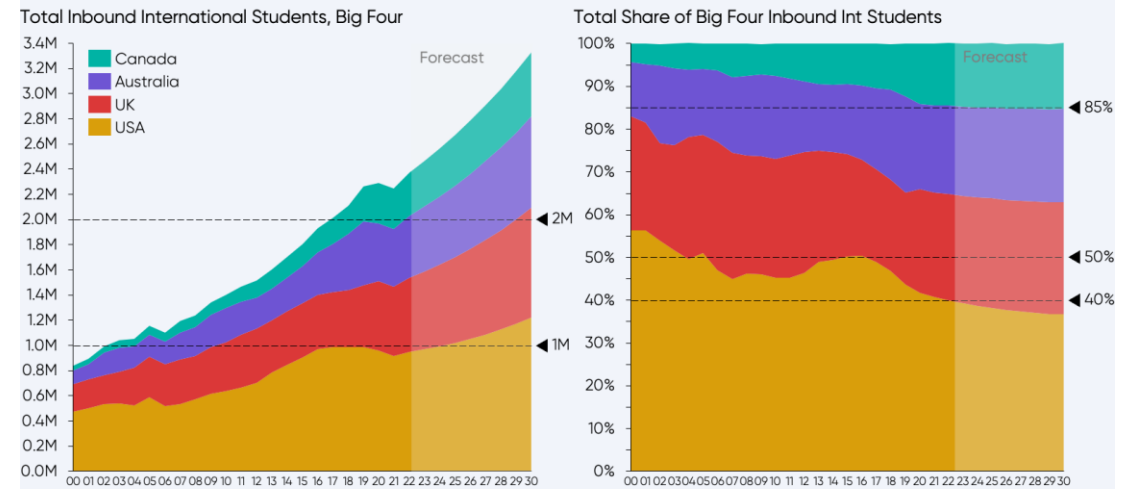
Australia, Canada, the UK and US are commonly referred to as the 'Big Four' in international education. As the major English-speaking study destinations, they each compete for approximately 37% of the global flow of international students

The Big Four International Student Destinations have held a reasonably steady 37% share of global flows since 2000 (very slow decline evident).



HoloniQ Source: HoloniQ, UNESCO Total inbound internationally mobile students, both sexes (number). US gaps in UNESCO Data from 2000-2013 calculated based on 92% of Open Doors Flows (Average UNESCO % of Open Doors for UNESCO vs Open Doors Data 2013-2020)

The most likely forecast would see the US lose a further 3.3% share to direct peers, assuming 3.9% US growth and 5% AU, CA and UK growth.



HoloniQ Source: HoloniQ, UNESCO Total inbound internationally mobile students, both sexes (number). US gaps in UNESCO Data from 2000-2013 calculated based on 92% of Open Doors Flows (Average UNESCO % of Open Doors for UNESCO vs Open Doors Data 2013-2020)

Record Demand – Key Global Markets

International education is setting records for growth across key international student destinations.

United States - The total number of international students increased by 12% to more than 1 million students. The number of international students who enrolled for the first time at a U.S. college or university during the 2022/2023 academic year increased by 14% to 298,523, building on the 80% increase in the prior year.

United Kingdom - In 2021-22, there were 679,970 international students studying at UK higher education institutions. Student migration to the UK reached an all-time high in 2022, with around 484,000 study visas issued.

Canada - At the end of 2022 there were 807,750 international students in Canada at all levels of study. In 2023, a record 579,075 study permits were granted. This is a 36% increase on pre-pandemic levels in 2019.

Australia – We will have an in-depth look at the Australian market shortly.

Source: <https://opendoorsdata.org/annual-release/international-students/#fast-facts>

Source: <https://www.universitiesuk.ac.uk/universities-uk-international/explore-uuki/international-student-recruitment/international-student-recruitment-data>

Source: <https://migrationobservatory.ox.ac.uk/resources/briefings/student-migration-to-the-uk/>

Source: Government of Canada - <https://open.canada.ca/data/en/dataset/90115b00-f9b8-49e8-afa3-b4cff8facaee>

Student Visa Grant Trend - The 'Big Four'

The COVID-19 pandemic influenced a decline in student visa grants in Australia, Canada, the UK, and the USA between 2019 and 2020.

Time series of student visa grants 2019 – 2023 demonstrate that in 2022 and 2023 student visa grant numbers rebounded quickly across all markets.

In Australia in 2022, there was a large volume of student visa applications and the sector experienced long delays in visa processing. Increased DHA resources resulted in a large increase in student visa grants from October to December 2022.

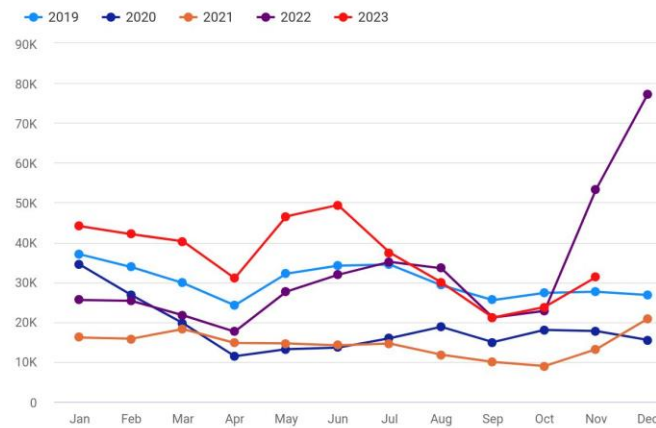
Canada and the UK kept borders open throughout the pandemic and continued to accept international students.

UK visa grants has shown exponential growth from mid 2021.

For the fourth consecutive year, the United Kingdom was the top receiving country of new international students out of all OECD countries, ahead of the United States, Canada, Australia and Japan.

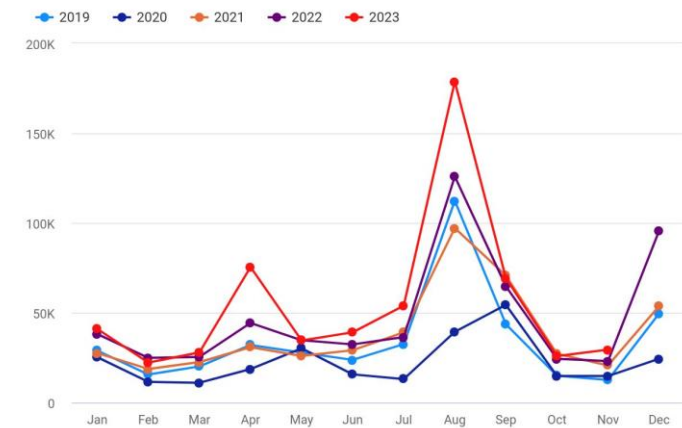
Source: Department of Education, Australian Government, <https://www.education.gov.au/international-education-data-and-research/other-international-education-data-and-research>

Student visa grants – Australia



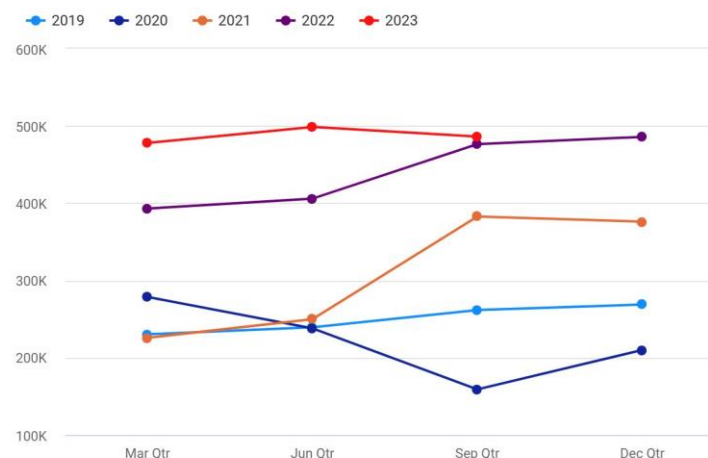
Source: [Department of Home Affairs](#)
 Note: Includes primary student visa holders only. Excludes Foreign Affairs of Defence sector visas. Student visa grant reporting and the timing of academic years differs across countries.

Student visa grants – Canada



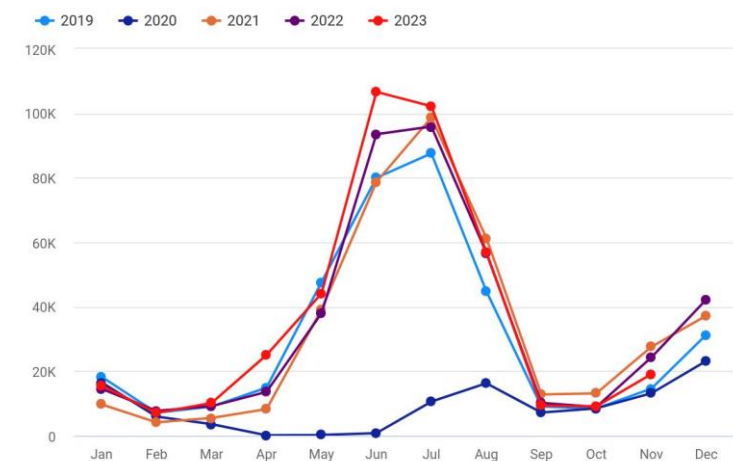
Source: [Immigration, Refugees and Citizenship Canada](#)
 Note: Includes Study Permit holders. Student visa grant reporting and the timing of academic years differs across countries.

Student visa grants – UK



Source: [Home Office of the United Kingdom](#)
 Note: Includes Child Student (Sponsored study) and Student (Sponsored study) visas. The UK publishes visa grants data quarterly and each quarter figure is the cumulative number of the previous 12 months. Student visa grant reporting and the timing of academic years differs across countries.

Student visa grants – USA



Source: [United States Department of State – Bureau of Consular Affairs](#)
 Note: Includes F1 and M1 student visas. Student visa grant reporting and the timing of academic years differs across countries.

India – Driving Global Growth

China and India remain the two leading places of origin for International students across the United States, United Kingdom, Canada and Australia. However, the market share for source country is shifting with India gaining increasing importance.

In the **United States**, India remained the second largest source country, however this market reached an all-time high of 268,923 international students in 2022/23, an increase of 35%. China recruitment remained flat in terms of overall growth.

In the **United Kingdom** there were a total of 126,535 Indian students representing a 50% increase year on year. Chinese student enrolments grew by 5.5% during the same period.

The Indian student market for **Canadian institutions** has grown 46% since 2019 and there were 320,000 Indian students with active study permits at the end of December 2022.

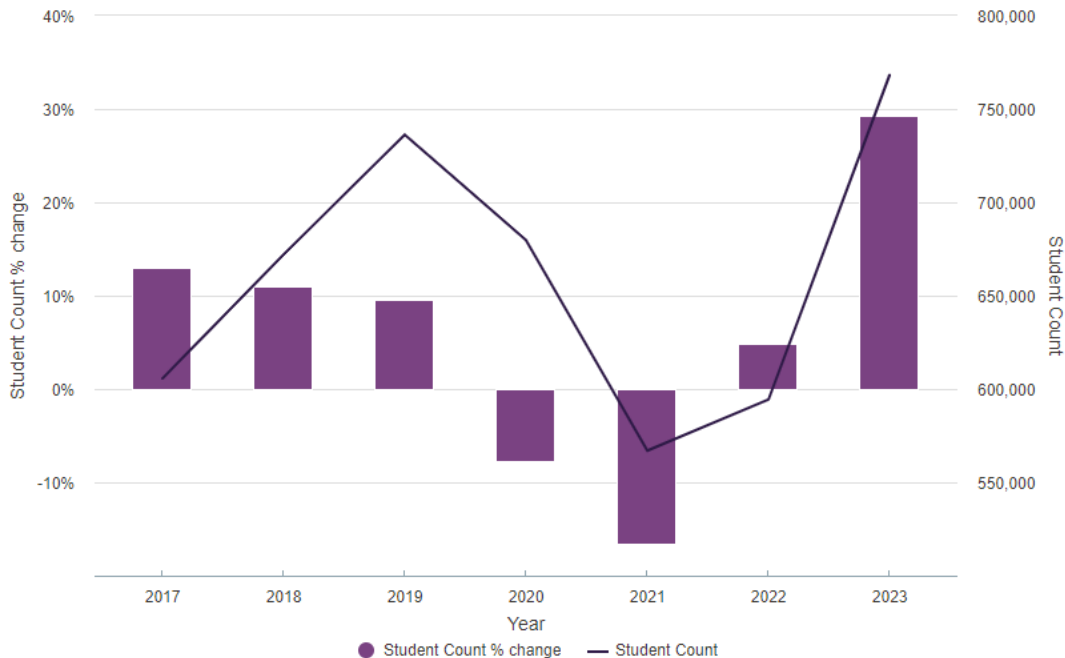
In **Australia**, Indian student numbers grew by 31% between 2022 and 2023. Chinese student numbers grew moderately in comparison, by 5% over this time.

Record Demand - Australia

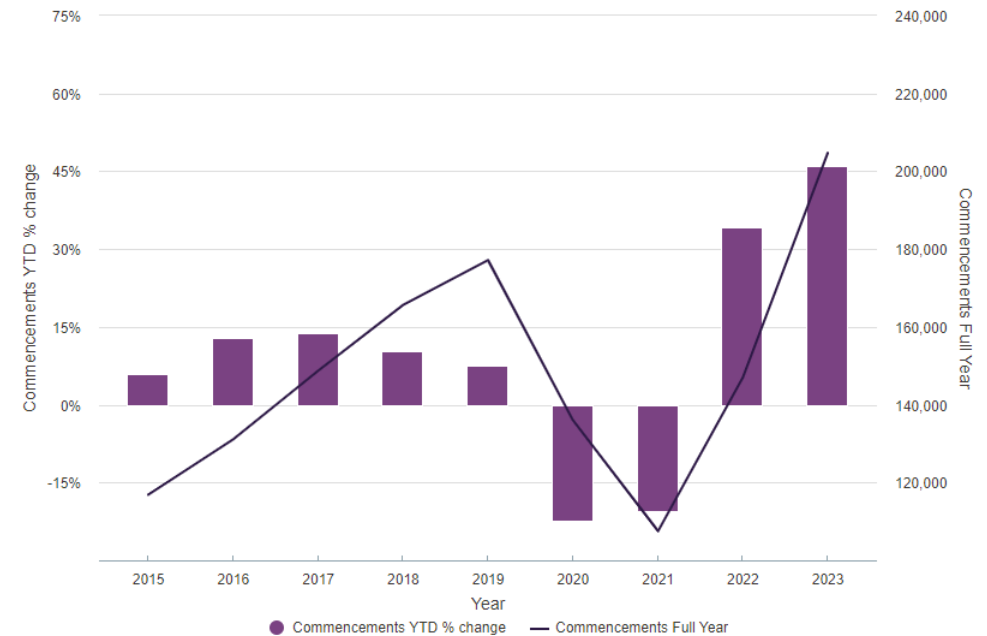
As of October 2023, there were 768,113 international students in Australia. This represents a 29% increase on 2022 and surpasses pre-pandemic numbers of international students in Australia.

There were 204,691 international student HE commencements in Australia as of October 2023. This represents a 39% increase on commencements (147,037) in 2022.

All International Student Headcount YTD October 2023



Higher Education International Student Commencements YTD October 2023



International Student Enrolment Trend - Australia

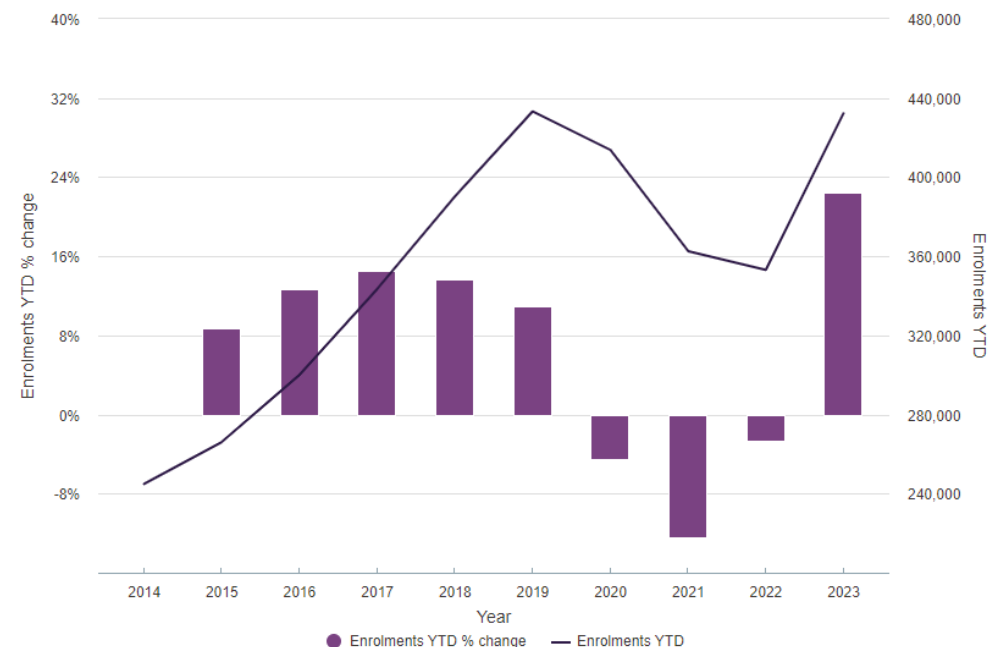
International Student Enrolments YTD October 2023



Source: Department of Education
 Filtered by: Sector All, Nationality All, and State All

There were 940,310 international student enrolments in Australia as of October 2023. This represents a 33% increase on 2022.

Higher Education International Student Enrolments YTD October 2023

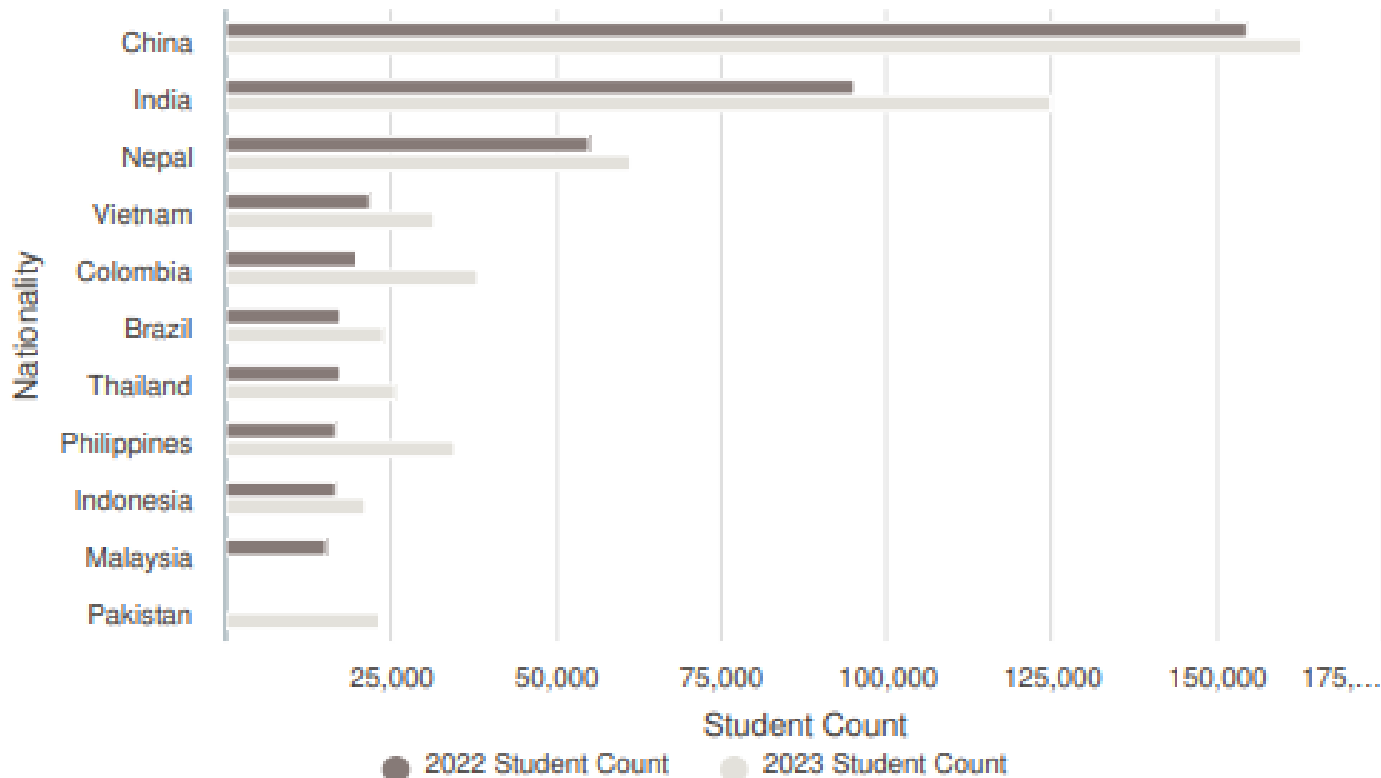


Source: Department of Education
 Filtered by: Sector Higher Education, Nationality All, and State All

There were 432,184 international student HE enrolments (commencing and continuing) in Australia as of October 2023. This represents a 22% increase on 2022.

International Student Enrolments

Top Source Countries – Australia YTD October 2023



Source: Department of Education

Nationality	2022 HC	2023 HC	% Change
China	154,699	162,826	5%
India	95,237	124,820	31%
Nepal	54,891	61,320	11%
Vietnam	21,903	31,634	44%
Columbia	19,619	38,033	93%
Brazil	17,463	23,914	37%
Thailand	17,255	25,462	47%
Philippines	16,735	34,655	107%
Indonesia	16,485	20,983	27%
Malaysia	15,162	-	-
Pakistan	-	23,092	-

Tightening of International Education Policy Settings

Unease around record-high migration, housing supply and cost of living in Australia, Canada and the United Kingdom has resulted in a raft of policy changes and tightening of international education policy settings for 2024.

The policy changes will mean:

- A move away from unrestricted growth on international student numbers
- Changes to international student visa conditions
- Focus on integrity measures to improve standards for both providers and students

Summary Changes to International Education Policy Settings

United Kingdom

As of January 2024, international students in the UK will no longer be permitted to bring dependents on their student visas unless they are enrolled in a postgraduate research program.

Foreign students cannot change to a work route visa unless they have finished their studies.

Consideration of changes to post-study work rights.

Canada

In 2024, Canada will establish a cap (364,000) on the number of new study permits issued to international students. This will result in a 35% reduction in approved study permits compared to 2023 levels.

As of 1 September 2024, students enrolled in programmes delivered via public-private partnerships will no longer be eligible for post-graduate work permits.

Limiting work permits available to spouses of international students.

Australia

The Australian Government's **Migration Strategy** and **Nixon Review** introduced several changes:

- Cuts to post-study work visas
- Increase in minimum English Language Requirements
- Replacing the “genuine temporary entrant” requirement with a “genuine student test”
- Introduction of a new integrity unit. Apply greater and targeted scrutiny to student visa applications.
- No concurrent COEs allowed
- Assessment framework for Registered Migration Agents strengthened.

Visa and Migration Reforms - Australia

The Australian Government's Migration Strategy, the Nixon Review into the Exploitation of Australia's Visa System and other actions announced by the Australian Government have flagged significant changes aimed at addressing identified loopholes and integrity issues, improving education agent behaviour and the quality of students recruited to study in Australia.

Visa and Migration Reform Actions	Implementation Timeline
Closed 'loophole' allowing students to hold concurrent certificate of enrolments enabling them to change providers within six months of arrival.	Implemented August 2023
Increased amount of savings that students need to evidence as part of their visa application process. From 1 October 2023, student visa applicants will need to show they have a minimum of AU\$24,505 in savings to cover annual living costs.	Implemented October 2023
Apply greater and more targeted scrutiny to student visa applications from high-risk providers.	Implemented late 2023
Bolster the student visa integrity unit in the Department of Home Affairs to reduce misuse of Australia's student visa system.	Implemented late 2023
Replacing the "genuine temporary entrant" requirement with a "genuine student test".	Implement March 2024
Increase minimum English language requirements to the equivalent of an International English Language Testing System (IELTS) score of 6.0 for student visas – up from 5.5 at present – and 6.5 for temporary graduate visas	Implement early 2024
Post-study work rights for International students will be reduced. The changes will limit post-study work rights to two years for bachelor's or taught master's qualifications, and three years for those with higher research degrees. Students who study in regional areas will still qualify for an extra year or two of work rights, under changes introduced in 2019.	Implement mid-2024
Fit, Proper and Person of integrity (FPP) assessment framework for Registered Migration Agents (RMAs) will be introduced and include a background check component facilitated via AusCheck.	The Government agrees with this recommendation and will strengthen framework
New Immigration Compliance Division to be established within the Department of Home Affairs. The new division will be supported by \$50.0 million over 4 years from 2023–24 and \$15.3 million per year ongoing.	The Government agrees with this recommendation and has started implementation.
New Integrity Unit within ASQA to ensure compliance, targeting non-genuine providers who may be exploiting international students. An investment of \$37.8m has been identified to support this action.	The Government agrees with this recommendation and has started implementation.

Visa and Migration Reforms - Australia



International student visa numbers fall amid migration squeeze

EXCLUSIVE
By RHIANNON DOWN
REPORTER

9:25PM JANUARY 28, 2024
114 COMMENTS



The number of visas granted to offshore students dropped to 139,132 in the first half of the financial year, with nearly 20 per cent of all applicants rejected. Picture: Jane Dempster

The number of international student [visa holders](#) approved to come to Australia is on track to plummet by more than 90,000 this financial year, as the federal government rejects an increasing number of applicants to curb the high levels of temporary migration.

Extracts from the article

The number of international student [visa holders](#) approved to come to Australia is on track to plummet by more than 90,000 this financial year, as the federal government rejects an increasing number of applicants to curb the high levels of temporary migration.

The number of [visas](#) granted to offshore students dropped to 139,132 in the first half of the financial year, figures from the Department of Home Affairs reveal, with nearly 20 per cent of all applicants rejected. If the approval rate continues 91,715 fewer overseas students will arrive in 2023-24 compared with the past year.

In the past six months 98,198 student visas have been granted for study in the higher education sector showing a trend downwards from 2022-23 when 261,317 visas were granted through the course of the year, the highest in more than a decade.

While the rate of overseas Chinese university students being granted visas offshore remained steady at about 97 per cent, grant rates for offshore higher education students from India, Australia's second-biggest market, dropped from 74.2 per cent in 2022-23 to 60.8 per cent this financial year. Grant rates for the third-biggest market, Nepal, went from 65.2 per cent to 48.8 per cent in the same period.

Australian Universities Accord

The Australian Government has committed to the establishment of an Australian Universities Accord to drive lasting and transformative reform in Australia's higher education system. The Accord will be a visionary plan for Australia's universities and higher education sector.

The objective of the Accord is to devise recommendations and performance targets to improve the quality, accessibility, affordability and sustainability of higher education, in order to achieve long term security and prosperity for the sector and the nation.

The Accord Interim report highlighted the need for:

- More university places (especially in regional and outer suburban areas)
- Greater alignment between VET & higher education
- Increased collaboration between universities and industry

The interim report findings are highly aligned with Fed Uni's brand and market positioning (regional / outer suburban domestic focus and move to co-op model).

Jobs and Skills Reform

Australia faces a skills challenge not seen since the 1960's:

Employment growth

Over the next 10 years, total employment in the Australian economy is projected to increase by around 14.2%. That is, around 2 million more people will be employed in the Australian economy in 2033 than presently.

Demand for VET and higher education to grow strongly

Over the next 10 years, more than 9 out of 10 new jobs (around 92%) expected to be created will require post-secondary qualifications.

- Around half (48.4%) will require a bachelor degree or higher
- Around 44% will have VET as the primary pathway

Three key pillars that will enable Australia to meet this skills challenge are:

1. Vocational education and training (VET)
2. Higher Education
3. Migration

Each pillar needs to effectively complement each other and flexibly respond to skills and workforce needs.

Jobs and Skills Reform

- In 2022, **Jobs and Skills Australia** was established. Jobs and Skills Australia work across government and industry to advise and support decision making on the current and future skills and workforce needs in Australia.
- In 2023, the Australian Government released an **Employment White Paper, Working Future** which sets out policies and reform directions to enable Australia to meet skills and employment needs of the future.
- Commencing on 1 January 2024, **The National Skills Agreement** is a 5-year joint agreement between the Commonwealth, states and territories to strengthen the vocational education and training (VET) sector

Reform Priorities that align with Federation University Strategy:

- Meeting workforce needs in the growing care and support economy, the net zero transformation and technological change.
- Increasing the share of Australians studying in areas of high skills need, improving collaboration between the vocational and higher education sectors, and removing barriers to learning across the course of people's lives.
- Reforming the migration system through better targeting skilled migration, improving the employment outcomes of international students and realising the employment potential of migrants.

Federation University Global Strategy

Rebuild, grow and sustain quality student enrolments at our campuses, and on and offshore partnerships

- Develop new products/programs in response to untapped source markets
- Strengthen current education partnerships through deeper engagement and innovative collaboration
- Establish new education partnerships within Australia and overseas for articulation arrangements
- Introduce pricing and scholarship measures to boost quality applicants

Diversify international student source countries

- Maintain a Federation University presence in Asia
- Establish and manage networks of education agents in non-traditional markets
- Develop new products/programs in response to demand e.g. pathway programs, study abroad programs, edu-tourism programs

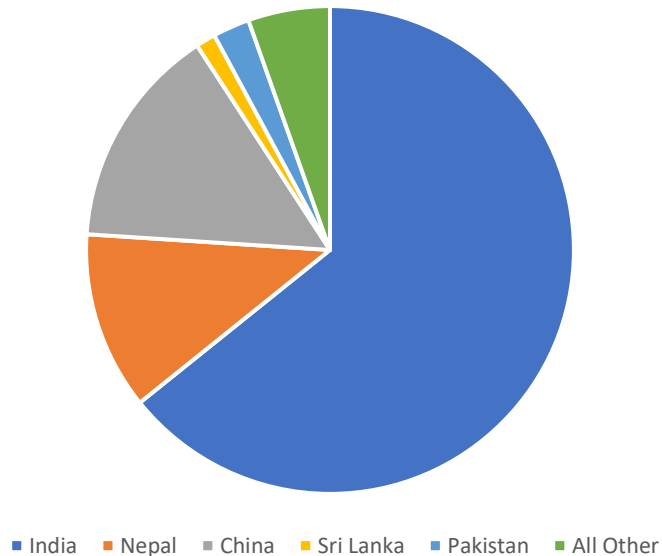
Build Federation University's profile as a globally engaged University through partnerships

- Seek and establish multi-faceted partnerships across education delivery, student mobility, research collaboration and lifelong learning opportunities
- Increase global relations through building relationships with Consular Corps and overseas governments
- Deepen relations with Austrade and Global Victoria and their offshore offices and representatives
- Establish new partnerships that facilitate virtual and global co-op placements

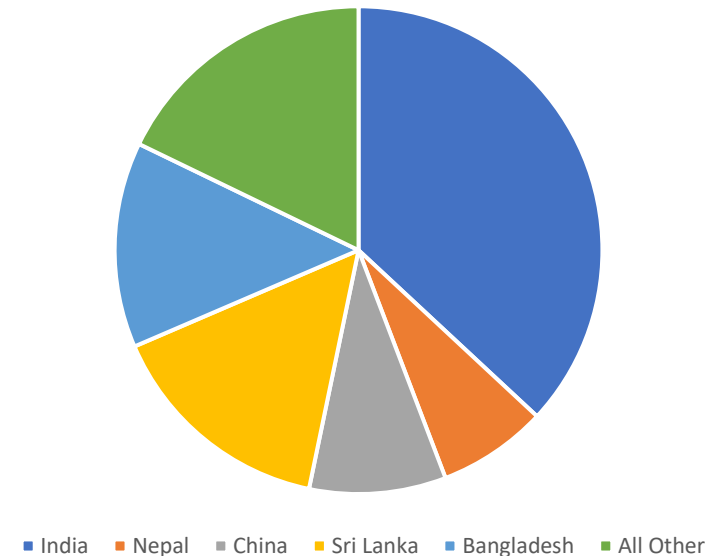
Federation University Global Strategy

- Commencing international students (headcount) at Victorian campuses in 2023 has been the highest ever for the University and the most diversified.
- Pathway programs and under 18 program enables new cohorts of students to be recruited.

2019 Fed Uni Campus Commencing Student Source



2023 Fed Uni Campus Commencing Student Source



- Encourage quality students through reduced education agents and removal of tuition fee discounts

Partnerships

Global Education Delivery partnerships

- Australia
 - MIT
 - IIBIT
 - ATMC
 - OES - Federation University Online
- China
 - Hebei University of Science and Technology
 - Zhejiang University of Technology
 - Shenzhen Polytechnic University
 - Shaoguan University
- Sri Lanka
 - Nawaloka College of Higher Studies

Government partners – Australia and overseas

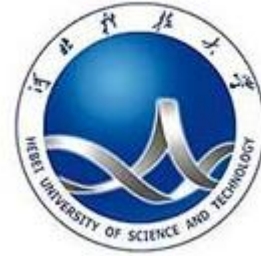
Industry partners – Australia and overseas



Global Strategy and Partners

Global Strategy - Strengthen education partnerships through deeper engagement and innovative collaboration

- Hebei University of Science and Technology
 - Articulation agreements at Master level
 - Joint supervision of PhDs



- Zhejiang University of Technology
 - Research collaboration



- Employability.Life
 - Fed Uni strategic education partner of Employability.Life
 - Increase employability of Indian graduates
 - Indian University partnerships where students complete Experiential Micro-credentials (XPMC) approved by Federation University
 - Increased profile of Federation University with industry and government bodies, e.g. All India Council for Technical Education (AICTE)



Global Strategy and Onshore Education Delivery Partners



- Fed Uni Country Representatives - China, India, Sri Lanka, Indonesia, Philippines, Vietnam
 - Student recruitment and engagement, business development and partnership-related activities, alumni engagement, expert market advice
 - Work closely with partners to recruit for all locations
- Increased integration of market presence and activities with education partners to improve onshore partner and Fed Uni campus commencements
- Aligned marketing and recruitment plans for traditional markets and diversified markets
- Fed Uni agents can service all campuses and partner locations

Global Strategy and Government and Industry Partners

- Build University profile and build co-op placement opportunities virtually and globally



How else can we collaborate on fulfilling the Fed Uni Global Strategy through partnerships?

STRATEGIC OBJECTIVE



**Transform
lives**

STRATEGIC OBJECTIVE



**Enhance
communities**

STRATEGIC OBJECTIVE



**A strong and
sustainable
university**

Thank you