

International Education Policy and Advocacy Report 2016

Government Policy and Regulation

2016 was a year of continued policy development and implementation of new strategies and frameworks in quality standards, student visas and promotion of international education. COPHE participates in many consultation forums and workshops and makes formal submissions to represent the interests of members, and assist co-operatively with other peak bodies and government to develop sound policies and processes to support the industry.

Highlights in 2016 and early 2017 included:

1. The launch in April 2016 of *The National Strategy for International Education 2025*, and the Austrade *Australian International Education 2025* Roadmap marketing strategy; these followed extensive stakeholder consultations, and indicate the high level of government support, and recognition of the economic, social and cultural contribution of international students.
2. Establishment in October 2016 of the restructured *Council for International Education* to provide high level advice and strategy, with the 6 relevant ministers, international education and broader industry representatives.
3. Continued constructive consultation through the quarterly *Education Visa Consultative Committee* (EVCC) meetings of the Commonwealth Departments of Immigration and Border Protection (DIBP), Education and Training (DET) and Trade, the 8 education peak bodies, State and Territory representatives, the Council of International Students Australia and other stakeholders, as well as smaller specific working groups.
4. Quarterly *DET Data Group* and broader *DET Stakeholders* meetings, with improved reporting of data and trends, and more accessible and improved data visualisation tools.
5. Enactment in July 2016 of further changes to the *Education Services for Overseas Students* (ESOS) framework to streamline and simplify administrative processes, including aligning domestic and ESOS regulatory powers of “ESOS Agencies” - DET, TEQSA, ASQA, TPS etc - and provider registration and accreditation processes, with provision for a simpler internal review of ESOS decisions.
6. The development by DET and the International Education Association of Australia (IEAA) of an *Agent Code of Ethics*, based on the 2012 *London Statement*; DET is currently developing a process to share publically student performance to enable institutions to manage better agents and their compliance commitments.
7. Introduction from July 2016 of the new *Simplified Student Visa Framework* (SSVF); after some initial teething problems, including visa processing delays and some confusion by students and agents, the SSVF now seems to be working satisfactorily, although DIBP needs to continue to provide monitoring and training at post to ensure consistency in decision making. Minister Birmingham and Assistant Minister Hawke, with senior officers from both DET and DIBP held a Ministerial Roundtable in November 2016 with peak bodies to review the performance of the SSVF and receive feedback and recommendations; again this demonstrated the government’s interest in, and support for international education.
8. Review and update of the *National Code* to reflect ESOS changes and evolving educational practice; a final draft was released in February 2017 for public comment, with an intended

implementation in July 2017. The revised Code is evolutionary, based on the previous 2007 version; changes include allowing more online or distance components, clearer guidelines for granting a student release during the first 6 months of the principal course, and under 18 welfare provisions.

9. Changes to skilled migration occupations lists and skilled migration visas; the Skilled Occupation List (SOL) and Consolidated Sponsored Occupation List (CSOL) have been replaced by the *Medium and Long-term Strategic Skills List (MLTSSL)* and *Short-term Skilled Occupation List (STSOL)*, with a reduction in the number of listed occupations to reflect labour market conditions. Applicants for a Skilled Independent Migration 189 visa, a Skilled Regional Provisional 489 visa, or a Temporary Graduate 485 Graduate Work Stream visa must nominate a MLTSSL occupation. The controversial Temporary Work (Skilled) 457 visa will be abolished in March 2018 and replaced with a new *Temporary Skill Shortage (TSS) visa*, with a short-term stream of up to two years and a medium-term stream of up to four years. The permanent residence eligibility period will be raised from 2 to 3 years, so those on the short-term stream will be ineligible.

Market Trends in International Education

Globally there are over 4 million tertiary international students. Education systems and definitions vary; *tertiary* is taken as equivalent to diploma and higher education qualifications in Australia, or Australian Qualifications Framework (AQF) level 5 and above. The number of students has been increasing steadily over the last several decades, but has remained consistent at around 2% of total tertiary participation. This figure may increase as more countries and students realise the benefit of shorter international mobility experiences (as opposed to taking the full course offshore). Disruptive change such as wider access to online courses is also likely to impact.

Distribution by source and destination countries has been volatile, driven by cost, status, perceived quality of institutions, government policy (including migration and work opportunities) and lifestyle and safety factors. The major destinations in 2014 were the USA with 26%, UK 13%, Australia 8%, and France and Germany 7% each. Current geopolitical events in Europe and the USA, and the emergence of new destinations such as China, Japan, Malaysia, Singapore and the UAE will affect student choice. While the USA and the UK have so far maintained their primary positions, there has been an observed trend for students to prefer closer, newer destinations in their own region. There is also more institutional comparative data available, with international institution rankings, and graduate and employer surveys.

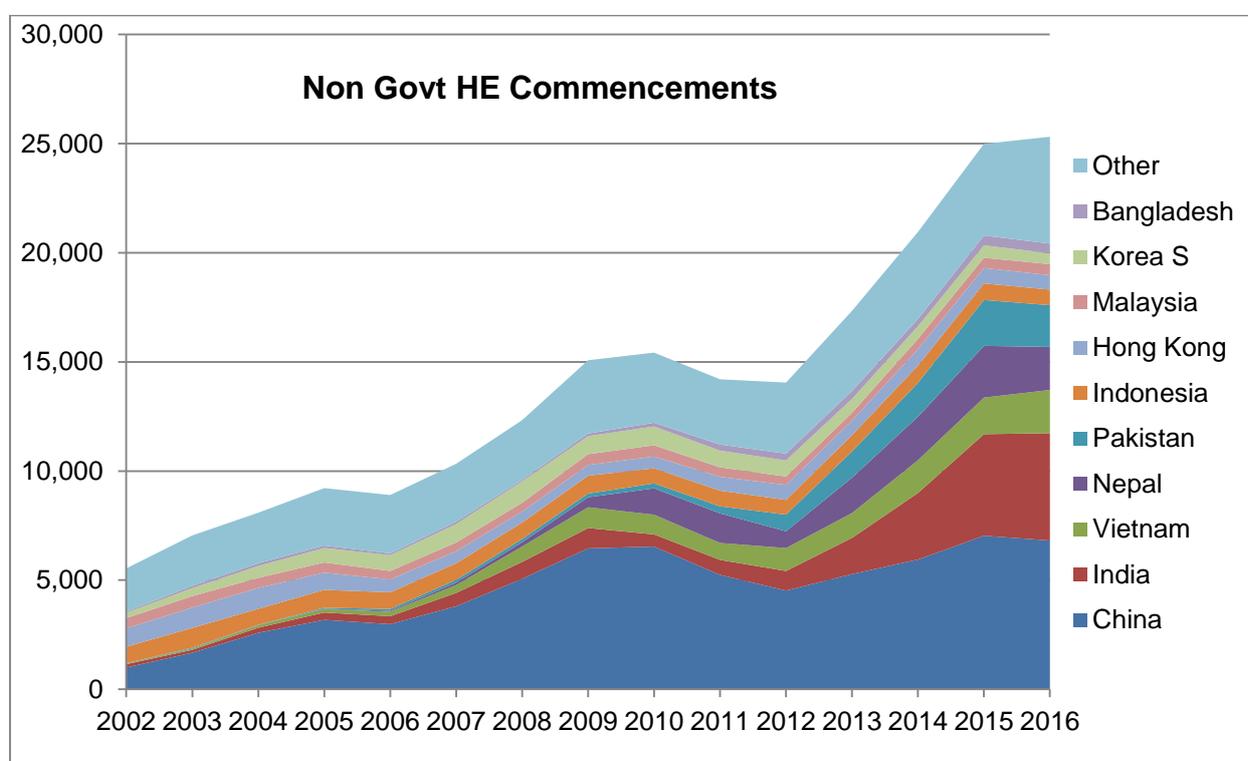
Australia continues to grow after the “perfect storm” downturn a few years ago, with more favourable exchange rates, abatement of safety concerns and access to graduate post study work rights. Australia also has geographic and lifestyle attractions to the major East and South Asia markets.

Australia also has a well regarded regulatory framework, including consumer protection, and excellent data. In the past it has been hampered by inconsistent and changing skilled migration policy, an important attraction for many students. The National Strategy and Roadmap envisage 6% pa growth; this may be an underestimate of potential demand. A possible future speedbump may be continuing community acceptance if numbers continue to grow as projected, especially given the emerging political environment elsewhere.

In the 12 months to June 2016, total offshore visa grants to primary applicants (actual students, not including family members) were 184,324; of these, 99,256 were for higher education coursework (UG and PG). In the 6 months to December 2016, total offshore visa grants were 92,748, an increase of 7% over 2015; HE coursework grants were 52,366, a 12% increase.

In 2016 there were 554,179 international students in Australia, an 11% increase, although not all were in country at the same time. DET PRISMS data show 712,884 separate course enrolments, up 11% and 414,292 new commencements, up 10% (the same student may enrol in several courses). Higher education had 306,691 of enrolments, and 132,269 of commencements, a 13% increase over the previous year.

Non-government institution HE enrolments were 54,685, up 18% for an 18% share; commencements were 25,317, up 1%, for 19% share. Bachelor degree commencements were up 13%, for an 18% share, but Masters coursework were up only 1%, for a 10% share. HE Diploma commencements, mostly Bachelor pathways were down 3%, but still with a dominant 79% market share.



COPHE member services

COPHE maintains a website including an international page, and circulates alerts and information to an international mail group, including summaries of EVCC discussions. It also reports quarterly DIBP student visa data, annual higher education data, and DET/Austrade PRISMS enrolment and commencement data, usually to correspond with the main higher education autumn (March) and spring (August) intakes, and year end.

COPHE priorities for international policy in 2017 include:

1. Monitor the ESOS, National Code and SSVF changes, with feedback from members to inform government advocacy; in particular, DIBP welcomes cases of apparent inconsistency in student visa decisions under the genuine temporary entrant (GTE) test.

2. Improve international education engagement and opportunities for all providers and students, including access to government funding for outbound student mobility (New Colombo Plan, Endeavour programs) and participation in Austrade and government offshore missions.
3. In consultation with members, develop workshops and information feedback sessions, sometimes including relevant government representatives.

Links

Council for International Education: <https://www.education.gov.au/news/new-council-international-education>

DET HE Statistics: <https://www.education.gov.au/student-data>

International Education, ESOS, National Code, National Strategy, data and research: <https://internationaleducation.gov.au/Pages/default.aspx>

DIBP student visa data: <http://www.border.gov.au/about/reports-publications/research-statistics/statistics/study-in-australia>

Future Directions for SSVP: <https://www.border.gov.au/Educationproviders/Pages/education-providers.aspx>

Visa requirements portal and fact sheets: <https://www.border.gov.au/Trav/Stud/changes-student-visa>

Austrade data, PRISMS pivot tables, Orbis tool: <http://www.austrade.gov.au/Australian/education>

Austrade Australian International Education 2025: <https://www.austrade.gov.au/Education/Services/australian-international-education-2025#.VdPXqfmqpBc>

Temporary Work (Skilled) Visa subclass 457 Replacement: <https://www.border.gov.au/Trav/Work/457-abolition-replacement>

Medium and Long-term Strategic Skills List (MLTSSL): <https://www.border.gov.au/Trav/Work/Work/Skills-assessment-and-assessing-authorities/skilled-occupations-lists/mltssl>

Short-term Skilled Occupation List (STSOL): <https://www.border.gov.au/Trav/Work/Work/Skills-assessment-and-assessing-authorities/skilled-occupations-lists/combined-stsol-mltssl>

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