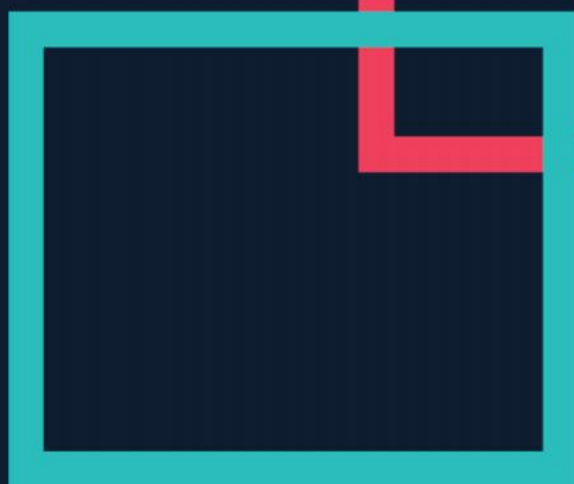


International Education Scanning Report

Nov 2014



**NEW ZEALAND
EDUCATION**

ThinkNew[®]

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Education New Zealand (ENZ) has contracted Education Directions (ED) to provide this monthly scanning report of the international education environment. The purpose of the reports is to develop a better shared understanding of the international education industry. Reports are intended to facilitate, not lead, discussion.

Feedback is welcome - contact Dave Guerin (ED) Directions, at 0800 500 552 or dave@ed.co.nz. If you wish to contact ENZ, please contact the Business Development Team ebd@enz.govt.nz.



November 2014 Executive Summary

Markets

1. Australian enrolments grew by 11.6% in Jan-Sep 2014, when compared to the previous year, but new visa grants were only 2.4%, suggesting that future enrolment growth will slow.
2. Canadian study permits for Jan-Sep 2014 were up 11% on the previous year. NZ's approved visas were up 19% for the Jan-Oct 2014 period, compared to the previous year. UK approved visas were up 3% for the Jul-Sep 2014 quarter, compared to the previous year.
3. The annual US Open Doors report showed that 2013/14 international enrolments were up 8% on 2012/13. China and Saudi Arabia were the key growth markets. The number of US students studying abroad was up 2%. Another report found that the industry's value was up 12% in 2013/14.
4. US enrolment growth is continuing in 2014/15, with student visas up 8.8% in Oct 2014, compared to the previous year. Graduate enrolments were also up 8%, with a decline in Chinese entrants (the first since 2004) offset by Indian and Brazilian growth.
5. Two UK studies explored transnational education, based on a census of providers and an exploration of pathways to degree study in the UK.
6. ICEF's i-graduate Agent Barometer provided rich information on which countries agents favoured, and where they experienced visa difficulties, amongst other things.
7. The British Council reported on Japanese students' study abroad intentions.
8. A European University Assn study looked at how universities responded to rankings, including the perceived value of them to international students.

Government

9. Dubai changed its rules for private school operators, seeking to ensure that local schools with foreign brands enjoy the full backing of their home organisations.
10. The UK announced a Generation UK-India plan to send 25,000 students to India over the next 5 years on study and work exchanges. The plan was ambitious, but seemed to still need private sector support.
11. US President Barack Obama made a major speech on immigration, enacting executive orders (extending short-term work rights during and after study for STEM students) and proposing new legislation (assuring green cards for some master's and PhD STEM students). Getting the legislation approved by Congress will be tough. He also approved much longer visa approval terms for Chinese students and exchange visitors.
12. UK Prime Minister David Cameron proposed sweeping immigration changes, which will be constrained by EU treaty commitments. The wider immigration debate continued there, with students and a free-market thinktank arguing that international graduates should be able to set up a business.
13. Australia and China finished negotiations on their free trade agreement, with the text to be finalised in 2015, including sections on international education

Markets

Market Size & Value

Country	Growth	Notes
Australia	11.6%	Jan-Sep 2014 compared to Jan-Sep 2013, total enrolments
Canada	11%	Jan-Sep 2014 compared to Jan-Sep 2013, all study permits issued
United States of America	8.8%	Oct 2014 compared to Oct 2013, F1 and M1 (full program of study) and J-1 (exchange visitors) visas
New Zealand	19%	Jan-Oct 2014 compared to Jan-Oct 2013, approved student visas
United Kingdom	3%	Jul-Sep 2014, compared to Jul-Sep 2013, study-related visas (excludes student visitors)

Australia The Australian Dept of Education released [enrolment data for Jan-Sep 2014](#), showing an 11.6% increase in total enrolments, and a 17.1% increase in enrolments compared to Jan-Sep 2013. The highest percentage growth was from Brazil, Nepal and The Philippines. Overall, the visa and enrolment data suggests that Australian growth is starting to slow, but remains high ([The PIE News](#)).

The Australian Department of Immigration released the [Sep 2014 quarter report for student visa applications and grants](#) (88 pages). Total visa grants were up 2.4% on the Sep 2013 quarter – offshore visa grants were up 10.8%, while onshore grants were down 8.0%. Offshore visa grant growth was highest from China and India, while Brazil, Nepal and Vietnam declined. The number of visa holders in Australia was up 11.8% on the Sep 2013 quarter.

Finally, the [value of international education in the year to June 2014](#) was estimated to be A\$16.3b, up 8% on the previous year.

Canada Study permits issued to international students in Canada were [up 11% in Jan-Sep 2014](#), compared to the same period in 2013 (and up 26% on 2012). Various official spreadsheets (ie [this one](#)) still only provided data to the end of June 2014.

The Canadian Bureau for International Education (CBIE) released its 2014 version of [A World of Learning: Canada's Performance and Potential in International Education](#) (report only free for CBIE member institutions). The highlights are below and [The PIE News](#) had some extra details.

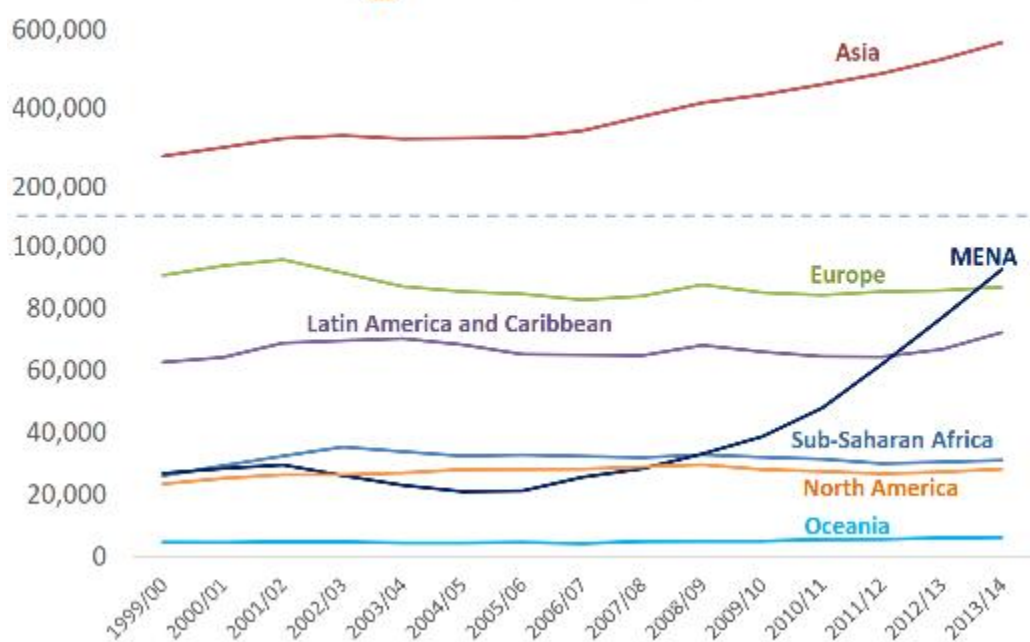
- There were 293,505 students in Canada in 2013, up 8% on 2012. 32% of those students were Chinese, while student numbers were growing quickest from Nigeria and Russia.
- 50% of international students in Canada intended to apply for permanent resident status in the future.

US Open Doors Report The Institute of International Education (IIE) [published its latest Open Doors Report on International Educational Exchange](#) ([media release](#), [55-page report](#)) based on a survey of

approximately 3,000 accredited US higher education institutions. The report is funded by the US Dept of State. Key findings are shown below.

- The number of higher education students in 2013/14 was up 8% to 886,052. Undergraduate students were up 9% and graduate students were up 6%. China and Saudi Arabia made up 73% of the growth, but India, Brazil, Iran and Kuwait also made up 18% of the growth. The US is doing well from government scholarship programmes in Saudi Arabia, Kuwait and Brazil.
- China made up 31% of all enrolments, with India second on 12%, and then South Korea on 8%.
- The number of US students going abroad was up 2% to 289,408. Fewer than 10% of US college students go abroad during their undergraduate degree. The Generation Study Abroad programme, launched in 2014, had attracted 450 partners.
- The report asked institutions about why their enrolments had changed and campus initiatives (eg pathway programmes). Enrolments were reported by subject and region (see figure below).

Regional Trends



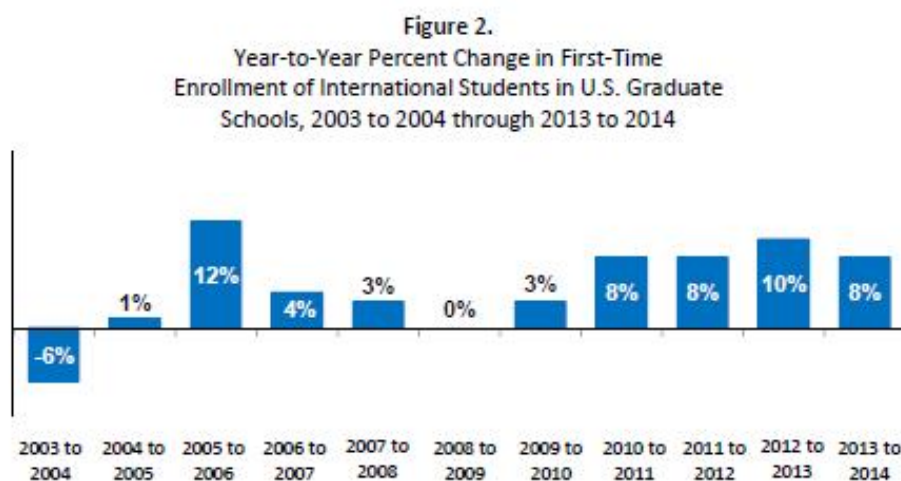
The Open Doors report is an excellent resource and has also been explored by [The PIE News](#) (and [again](#)) and [The Chronicle of Higher Education](#).

US Economic Value NAFSA [updated its International Student Economic Value Tool for the United States in the 2013-2014 academic year](#) ([media release](#)). They estimated that the economic value of the industry increased by 12% on the previous year (to US\$26.8b), while job support and creation were up 9% (to 340,000 jobs). Global market share was still in decline and NAFSA called once more for immigration reform.

US SEVIS Data The Student and Exchange Visitor Program (SEVP) released the [SEVIS by the Numbers Oct 2014 quarterly review](#) (31 pages), with the following highlights.

- Students on F, M and J-1 visas were up 8.8%, compared to the Oct 2013 quarter (F and M are long-term students and J-1 visas are for exchange visitors). Secondary school (+14%) and master's (+16%) students on F and M visas were up by even more. Indian F and M students were up 28% on the year before.

US Graduate Admissions The Council of Graduate Schools released [the third phase of its International Graduate Admissions survey](#) (28 pages). Offers of admission for foreign graduate students were up 7%, while enrolments were up 8%. First-time graduate enrolments were: up the most for India (27%) and Brazil (91%); and down the most for China (-1%), South Korea (-7%) and Taiwan (-8%). Enrolments were also up 8% for the Middle East. While new enrolments for traditional markets such as China and South Korea were declining (it was the first decline from China since at least 2004), the overall percentage increase in first-time enrolments was still the third largest in the last 11 years (see figure below).



Sources: CGS International Graduate Admissions Survey, Phase III, 2004 to 2014

New Zealand Immigration NZ and Education NZ published a [Student Visa Dashboard Year-to-date October 2014](#) highlighting the latest data on student visas issued (27 pages). The key changes, compared to the same period in 2013, included:

- 19% increase in total approved student visas, with 80% growth from India and 49% from Latin America; and
- 40% increase in first-time student visas, with 88% growth for PTEs and 50% for ITPs.

The report is an excellent resource, with 1-page reports on 19 regions or countries complementing the global analysis. NZ is now rivalling Australia for the best information on student trends in terms of timeliness and quality. While the total approved student visas increase is high, it takes NZ back to 2010 levels after lower visa numbers in 2011-13.

UK Immigration Stats The [Jul-Sep 2014 quarter immigration statistics for the UK](#) showed the following results (compared to a year before).

- Study-related visas granted (excluding student visitors) were up 3% to 222,941. The four largest absolute increases (but reported by percentage change) were from China (4%), Brazil (70%), Saudi Arabia (12%) and Libya (39%). The largest decreases were for India (-6%), Nigeria (-7%) and Pakistan (-10%). While the number of sponsored visas rose for universities and schools, it dropped for the further education and English language sectors.
- Study visitor visas granted (for visits up to 11 months) were down 1% to 75,525.
- The estimated number of non-EU long-term study-related immigrants was 121,000 for the year ended June 2014, down 8% from the previous year. This estimate covers those in the UK and planning to be there for over a year.

The number of those granted student visas who remained in the UK 5 years after graduation had dropped from 23% for the 2004 cohort to 15% for the 2007 cohort, reflecting tighter immigration criteria.

Market Events & Commentary

Indian Trends The Confederation of Indian Industry and the Association of Indian Universities released [Trends in Internationalization of Higher Education in India](#) (104 pages). 9 chapters by a range of authors covered statistical, policy and market issues ([news report](#)). The quality is a bit uneven, but it is well worth a read.

- About 25,000 international students studied in India in 2012/13 (mostly from Asia or Africa), or about 0.1% of all higher education students in India. About 200,000 Indian students went offshore.
- While plans exist to boost international student numbers in India, little action has been taken by government to date. One chapter (pp.47-56) explored the nature of those efforts, and India's links with the countries that send students.

Acquisitions [The International Language Institute \(ILI\) in Canada has sold a controlling interest to Anterior Education Systems](#). The new management plans to acquire more language schools across Canada in order to increase economies of scale and margins. They will shift towards a digital curriculum, and plan a public listing in 2015. Other deals are listed below.

- Japanese private equity fund New Horizon Capital [bought into Korean agents iae Global Group](#). iae places 20,000 students annually now and the plan is to expand through Asia.
- Canada's Loyalist group (which runs English language schools) will [acquire South Korea's largest education agency Uhak.com](#) for CAN\$8.1m. Loyalist wants to reduce recruitment costs.
- Canada's ILSC Education Group (English, pathway and internship offerings) [gained investment from Quad Partners](#). They will expand from sites in Canada, the US, India and Australia.
- International House World Organisation (IHWO) [added three new sites in Ecuador](#) to its brand, taking its total to 160 in 52 countries.

Snippets

- **Market Snapshots**...covered [language schools in New Zealand](#), [UK further education colleges](#), and [student accommodation](#).
- **ELT Market Cooling?** The Student Marketing firm [says the global ELT sector is entering a phase of consolidation](#).
- **United Kingdom** English universities will apparently [target the European Union for extra student recruitment](#) when a cap on undergrads is lifted next year. Since such students take out loans from the UK, and pay them back slower, the change will concern the UK government.
- **Germany** Worldcrunch reported on [the 26,000 Chinese students studying in Germany, many in technical universities](#).
- **Malaysia Closure** [Malaysia-based private institution Allianze University College of Medical Sciences closed after financial issues](#) (2,000 students were affected). It operated an Indonesian branch and in 2013 paid £30m for a London campus, which may have caused the problems.
- **Navitas**...said it had [lower growth in 2014](#) after moderating growth from India and Nepal, which showed signs of fraudulent activity. Navitas had a few other market challenges in 2014 too.
- **English Language Schools** The PIE News [summarised the views of national English language school association heads](#) at an ALTO meeting.

Transnational Education

UK Reports The UK's Department for Business, Innovation & Skills published a research paper on [The value of Transnational Education to the UK](#) (153 pages). A census of higher education institutions was complemented by existing data series. They found more transnational activity than was previously thought, as the definitions used in regular data collection led to under-counting. The total tuition value was estimated as £496m in 2012/13, with 37% from postgraduate tuition revenue.

The report found that institutions had a limited understanding of the costs and profits of their transnational education activities. Their marketing efforts were also less sophisticated than their efforts to bring international students to UK campuses. Since it is such a large report, we'd recommend people skim the chapters on the cost and value of transnational education (pp.93-99) and findings and recommendations (p.101-109).

The Higher Education Funding Council for England (HCFCE) published [Directions of Travel: Transnational pathways into English higher education](#) (15 pages). Over a third of international students who were first degree entrants in the UK started on transnational courses overseas. That proportion topped 50% for institutions with low-medium tariff scores¹. While this type of pathway limited first degree students' time in the UK, such students were likely to then study a higher degree in the UK (56% of Chinese students moved on to a UK postgraduate degree, but only 8% of Malaysian students). The other risk of the pathway is that offshore institutions develop their own degrees, as in Malaysia.

¹ Tariffs are based on students' required entry qualifications – a higher score = higher qualifications.

Snippets

- **China** [Xiamen University's Malaysian campus is being built](#) - China's first overseas campus.
- **Thousand Talents** The South China Morning Post published a lengthy and well-informed story on a [conflict between a foreign academic recruited to China and local authorities](#) (first published in the journal Science). The dispute centred on the fine print of grants and how they were used.
- **Joint Degrees** The American Council on Education published [Mapping International Joint and Dual Degrees: U.S. Program Profiles and Perspectives](#) (52 pages), based on a survey and interviews. The most interesting parts are the sections that explore the challenges experienced in operating the arrangements (pp.20-31), and the challenges by country (pp.32-38).
- **Ottawa-Shanghai Program** The University of Ottawa and the Shanghai Jiao Tong School of Medicine [launched a joint medical program](#), with Ottawa's program to be taught in Shanghai.
- **Norway-US** The Norwegian Centre for International Collaboration in Education and the US Institute of International Education [are working to foster US-Norwegian university partnerships](#).
- **Great Ambassadors** The UK is piloting Great Ambassadors, in which [Chinese students will be offered internships](#) to help companies access the Chinese market.

MOOCs

- **Post-MOOC Scholarships** [The University of Southampton will become the first institution to offer scholarships associated with a course on MOOC platform FutureLearn](#). It's a discounting approach to get students into the 2.5 year online MA in English Language Teaching.
- **Refugees** The University of the People [partnered with the UN High Commissioner for Refugees to offer tuition-free, accredited higher education online to refugees and asylum seekers](#).

Study Pathways

- **Canada** The Canadian Bureau for International Education (CBIE) published a report on the [pathways of graduates of offshore Canadian schools to Canadian post-secondary institutions](#) (4 pages). There were 104 offshore Canadian schools in March 2014, with 68 in China, and they are seen as a rich recruitment area for post-secondary institutions – various marketing suggestions were made. Australian and US institutions were also targeting the students.

Recruitment

Agent Barometer ICEF released highlights from its [2014 ICEF i-graduate Agent Barometer](#), with some shown below.

- The proportion of agents expecting to refer more students to specific countries in 2015 were as follows: US (80%), the UK (74%), Canada (73%), Australia (68%), New Zealand (67%), Ireland (62%), Germany (60%), Malaysia (59%), India (58%), South Korea (56%), UAE (53%), Switzerland (52%), and Spain (51%).
- The proportion of agents expecting to refer fewer students to specific countries in 2015 were as follows: Thailand (22%), Russia (19%), Japan (16%), Malaysia and Singapore (15% each), India and Italy (12% each), and China (11%).
- 51% of agents cited Canada as a country where visa difficulties occurred, followed by UK (44%), US (44%), Australia (27%) and NZ (12%).

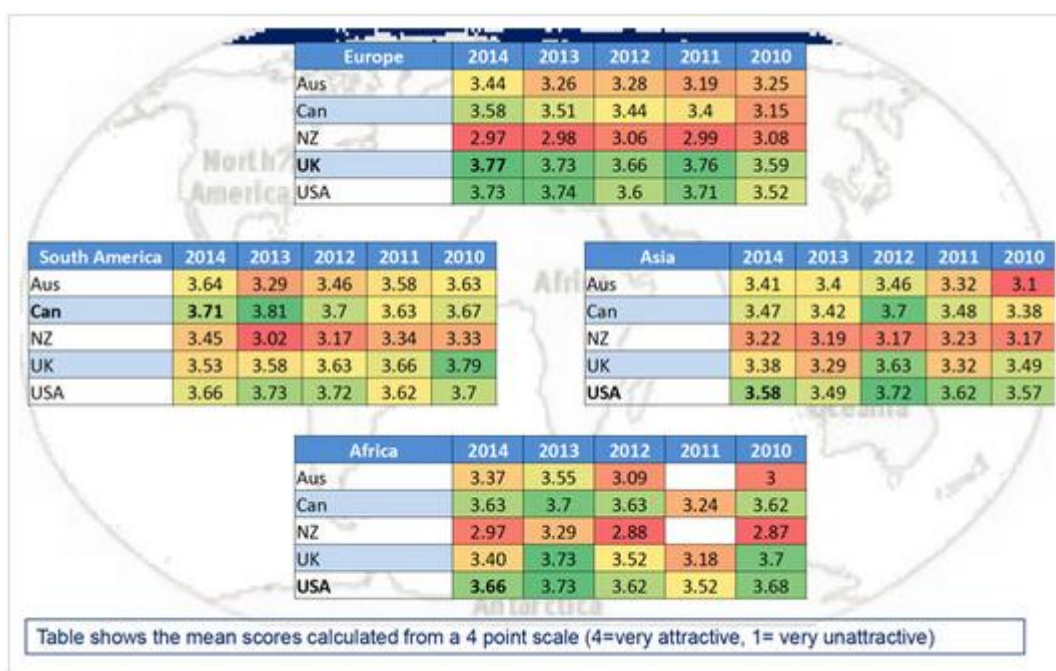


Figure 1 - Perceived attractiveness of countries by agents by region.

Snippets

- Partner Agency Scheme** International House World Organisation (IHWO) [launched a new partner agency scheme to act as a kitemark of quality for students](#). It aimed to recognise around 100 agents across 54 countries in the first year.
- US-NZ Promotion** Education NZ partnered with US-based search platform Go Overseas [to offer a US student a NZ\\$15k scholarship to study abroad in NZ](#), attracting 1,000 applications.

Retention & Achievement

The Australian Dept of Education released a commissioned report titled [English Language Proficiency and Employability Framework for Australian Higher Education Institutions](#) (70 pages). It was based on a literature review, interviews and forums. The report explored how higher education institutions were working to improve graduate outcomes by preparing students for employment after study. Students can face great difficulty securing post-study employment and this report is a positive start, but it might leave readers with a rosier impression of the sector than is deserved. While many useful practices are being implemented across the whole sector, there is no strong evidence of consistently good student outcomes. Putting aside that point, higher education institutions could pick up some useful tips.

Snippets

- **Canada** The Canadian Bureau for International Education (CBIE) published a report on the [Motivations and perspectives of 100 Brazilian students at Canada post-secondary institutions](#) (4 pages).

Post-Study Outcomes

- **Australia** A study has found that international students who study at a regional university in Australia [are up to 7 times more likely to work outside major city centres after graduation than their city-based counterparts](#) ([link to paywalled paper](#)).

Study Abroad

Japan The British Council released [“Japan: Debunking the ‘inward-looking’ myth”](#) (22 pages), which explored why Japanese students were participating less in offshore study, and how the Japanese government’s goal to double such study by 2020 might be achieved.

- Most students who wanted to study, or had studied, overseas aspired to international careers and had more positive views of their own future than those who did not want to study abroad.
- The 3 most popular reasons people wanted to study abroad were: to improve language skills; to travel; and to start an international career.
- Common obstacles cited to study abroad were a lack of foreign language skills, the cost, and a perception that it was unsafe overseas.

The report was based on a survey of 2,000 students, but it wasn’t clear how they were selected or whether they were an accurate sample. On the plus side, the results are segmented according to whether students had studied, planned to study or did not want to study abroad, and some of the results are interesting. On the downside, the report didn’t appear to debunk any myths, as it claimed in the title. The authors seemed to suggest that proving that Japanese students had the same or greater interest in offshore study than US or UK students was significant. Of course Japanese students have a long history of studying abroad (notwithstanding recent declines), whereas the UK and US are well-known for having minimal study abroad participation.

Snippets

- **UK Stats** The sixth edition was published of a [report identifying UK students' outward mobility](#) (63 pages), based on data from 135 institutions. Considerable detail was drawn from Erasmus data on mobility to Europe, with more limited data for mobility to the rest of the world.
- **US GSA** The US Council on International Educational Exchange (CIEE) [pledged \\$20m in scholarships for the Generation Study Abroad \(GSA\) initiative](#). It will also sponsor the costs of passports for 10,000 US students. The Institute of International Education (IIE) [announced that 142 new partners joined GSA in a third round of commitments](#), bringing the total to 450 partners.
- **100,000 Strong Initiative** Seton Hall University's Prof Joseph Stetar and a Peking University student [questioned whether the US initiative to have 100,000 students study in China between 2010 and 2014 is maximising its potential](#). It's a thoughtful piece.
- **United Kingdom** The British Council [launched a campaign calling on schools to bring back overseas exchange trips](#).
- **International Internships** The PIE News [looked at how the international internships sector is evolving](#), drawing on US, UK, Canadian and Australian case studies.

Rankings & Indices

European Survey The European University Association published [Rankings in Institutional Strategies and Processes: Impact or Illusion?](#) (60 pages). Universities watching their rankings will find the insights useful, as it draws upon responses from 171 higher education institutions. There is good insight into how institutions respond to rankings in their strategies, what they monitor (international students was top), who they felt rankings influenced, and how rankings have helped/hindered institutional activities.

Snippets

- **English Proficiency Index** [Education First published its latest English Proficiency Index](#), ranking a country's average adult English skill level. [Denmark topped the Index](#).
- **THE Rankings** Times Higher Education (THE) [abandoned its association with Thomson Reuters and renewed its link with Elsevier's Scopus research citation database](#).
- **Cities** [The latest QS Best Student Cities rankings were released](#) – Paris stayed at the top.

Government

Overarching Strategies

Saskatchewan The Canadian province of Saskatchewan (1.1m population) [released a new International Education Strategy](#) for the post-secondary sector ([2 page strategy](#)). They want to boost study abroad by 50% by 2020 (to 1,400), boost international students in the province by 75% by 2020 (to 6,200), and grow global research partnerships. They have a fairly standard, if unsophisticated, mix of actions for such strategies, reflecting their current low market size.

China-NZ Working Group NZ hosted [the 8th New Zealand-China Joint Working Group on Education and Training](#), with Chinese approval of distance education programmes high on the agenda (China does not recognise such programmes for any country, but a NZ-China free trade agreement mandated discussion of the issue). Agreements were signed [strengthening links between vocational institutions](#) and [increasing mutual qualification recognition](#). New Zealand also [launched a NZ\\$50k contestable fund to enable sister school relationships with Chinese institutions](#).

Snippets

- **India** The Indian government [was building stronger links with the US](#), including a partnership to bring US community college MOOC content to Indian platforms. India also [hosted a mission by the Irish government and higher education institutions](#).
- **Germany** Sebastian Fohrbeck of the German Academic Exchange Service (DAAD) said [plans for 50% of students to study abroad by 2020 will give Germany a major competitive advantage](#), given its export-based economy.
- **Non-EU Fees** The Norwegian government was criticised over [plans to charge non-European students tuition fees](#) and [later backed down](#). The latter story explored the wider debate, with the main Norwegian employers' group concerned that international students were not being recruited to fit local skill gaps, and that so many doctoral graduates left the country after graduation. In Finland, [most institutions have agreed to charge tuition fees to non EU/EEA students](#), although student groups continue to oppose the change.

Regulatory Issues

Ireland Industry body Marketing English in Ireland (MEI) is [introducing strict new membership criteria and due diligence procedures](#). 9 private colleges offering business, English and other programmes have closed in 2014 and 10 more could close after the government uncovered abuses of education and immigration regulation, and then put tougher regulations in place.

Dubai's... Knowledge and Human Development Authority (KDHA) announced [two new business models for private school operations](#). If an overseas brand is used, a local partner cannot be involved in the educational operations of the school. If a local partner does run the education side, no overseas brand can be used.

Snippets

- **Denmark** The Ministry of Education and Science [signed a compromise agreement with Danish universities watering down a proposal to slash funded places](#) (including those available to international students). Cuts were reduced and spread over a longer period.
- **Canada-Philippines** The Canadian Bureau for International Education (CBIE) and the Commission on Higher Education (CHED) of the Philippines [signed an MOU](#).
- **UK-Mexico Agreement** The UK and Mexican governments [signed a new agreement to mutually recognise study in the other's country](#). It will presumably be a long process.

Quality Assurance

- **Australia** Education Minister Chris Pyne has written to the Tertiary Education Quality and Standards Agency (TEQSA) [expressing concern over suspected systemic plagiarism by international students in Australian universities](#), after reports of students purchasing essays and exams online.

National Scholarship & Research Schemes

Generation UK-India UK universities minister Greg Clark [announced the Generation UK-India plan to send 25,000 UK students to India over the next 5 years](#). In 2015/16 the focus will be on: 2-week summer cultural immersion placements in study and work; teaching assistant placements for 2-3 or 6 months; and work placements for 2-6 months. Participants will receive free accommodation and a partial or total contribution to meal costs. It's an ambitious scheme but appears to rely on private support, which does not yet seem to have been confirmed.

Snippets

- **Erasmus Delays** An Erasmus scholar in Sweden [reported on widespread delays in receiving promised mobility grants](#).
- **New Zealand** The NZ Government [awarded 160 student scholarships to study in Asia under the Prime Minister's Scholarship for Asia programme](#).
- **New Colombo Plan** The Australian Government [announced that 3,150 Australian students will study and work in the Indo-Pacific region in the second year of the New Colombo Plan](#).
- **United Kingdom** The UK Higher Education International Unit and the Peruvian Ministry of Education [signed an agreement to deliver a postgraduate scholarships scheme for Peruvian students to study in the UK](#) (50-100 students in year 1).

Immigration

US President Barack Obama made a [major speech on immigration](#) on 20 November. While much of the ensuing political debate was on how he proposed to treat undocumented migrants, he also proposed making “it easier and faster for high-skilled immigrants, graduates, and entrepreneurs to stay and contribute to our economy”. Rather than wait for Congress to pass a bill (a Senate Bill has not been picked up by the House), he decided to make executive orders as well as push for legislation. The [policy details](#) included:

- expanding and extending the use of the existing Optional Practical Training (OPT) program for STEM students, and requiring stronger ties between OPT students and their institutions following graduation (done by executive order); and
- “staple” green cards to STEM master’s and PhD graduates from qualified US universities who have found employment in the US – employers would also have to pay a fee to support Americans to train in STEM fields (legislative proposal).

The moves would help American marketers, but any immigration bill that passes in the next year or two is unlikely to mirror the President’s proposals ([The PIE News](#)).

Another executive action included a new cooperation agreement between the USA and Chinese. It will see [short-term tourist and business visas extended from one to 10 years and student and exchange visas from one to five years for citizens from both countries](#). It replaced a process that required annual renewal of visas.

United Kingdom As in most months, the immigration debate continued in the UK, along with regulatory action.

- In a pre-election speech on immigration, Prime Minister David Cameron [outlined immigration proposals](#) (the transcript also included a Q and A at the end). He pledged to revoke licenses from colleges and business which failed to prevent large numbers of sponsored migrants from overstaying their visas. He also proposed measures to limit migration from within the EU, but some of them would be difficult to implement given the UK’s treaty commitments.
- Glyndwr University [had its Highly-Trusted Sponsor \(HTS\) status reinstated](#), allowing it to recruit international students after a 5-month suspension, but [on the condition that it relinquish its London campus](#).
- A survey by the London School of Economics found that [non-EU students are being increasingly distracted from their studies by the need to acquire work experience or apply for jobs](#) following the removal of the post-study work visa in the UK. Since they need to find a job within 4 months after graduation, they focus on employment earlier in their studies.
- The Economist explored [changing attitudes to the UK amongst Indian students](#).

A UK [report on entrepreneurs](#) (25 pages) found that only one third of non-EU students in the UK planning to set up a business on graduation wanted to do so in the UK. They also found serious information gaps about the availability of visas, and poor perceptions of institutional support. The report was prepared by the National Union of Students and The Entrepreneurs’ Network (part of the free-market Adam Smith Institute), which shows how odd bedfellows often agree on policy issues.

Recommendations from the report on entrepreneurs covered:

- allowing self-employment during study;
- adjusting capital requirements to reflect business costs in different sectors;
- providing extra support and guidance to students;
- allowing business accelerators to sponsor students; and
- allowing students to work prior to seeking an entrepreneur's visa.

It's a useful report exploring an area that gets very limited attention, as most immigration policy focuses on international students graduating and then moving on to employment, rather than entrepreneurship.

Snippets

- **Australian SVP** The Government published [a list of 55 newly designated "low risk" education providers eligible for streamlined visa processing \(SVP\)](#). The full list is [here](#) and added advanced diploma level courses.
- **Australian English Tests** The Australian government announced that [the TOEFL iBT test can be used to demonstrate English-language competence for post-study applications](#). Pearson's PTE Academic test was also [accepted for a wider range of visa applications](#).
- **South Africa Education** South Africa (EduSA) said [changes to visa regulations were harming South Africa's EFL market and some schools could lose up to 60% of their business](#). They asked their lawyers to work the problems through with the government.
- **California Scam** A California woman was sentenced to 16 years in prison after [founding and running Tri-Valley University as a front for an immigration scam](#).
- **Canada** The Immigration Consultants of Canada Regulatory Council (ICCRC) [proposed education-specific immigration advisor training](#), in response to new legislation meaning only registered consultants are allowed to advise international students on immigration issues.
- **New Zealand** Immigration policy changes included a [new primary sector scheme for trainees from Chile](#), which will require study and work placements. A [second set of changes](#) allowed all working holiday scheme participants to study for up to 6 months (some could only study for 3 months), amongst other changes.

Trade Issues

Australia-China Agreement Universities Australia said that [a China-Australia Free Trade Agreement \(FTA\) will foster a deeper relationship between universities](#). A [declaration of intent was signed in Nov 2014](#) by the two governments after the conclusion of negotiations, with the final text to be signed in 2015. The two governments also [signed related agreements](#) on student and academic mobility, and mutual qualification recognition.



An Australian [Dept of Foreign Affairs and Trade fact sheet](#) listed the following Australia-China FTA inclusions.

- 77 extra private higher education institutions will be listed as approved by the Chinese Ministry of Education within 1 year of the FTA signing.
- More work will be done on: mutual qualification recognition; student, researcher and academic mobility; and marketing and recruitment opportunities in China for Australian providers.
- Australia made assurances to China about protecting the interests of Chinese students in Australia (no details yet).

Political Risk

- **Confucius Institutes** A new book by the University of Chicago's Prof Marshall Sahlins titled *Confucius Institutes: Academic Malware* [claimed that Confucius Institutes were a threat to the principles of academic freedom](#). Australia's Parliamentary Library blog also discussed [the role of China's Confucius Institutes in spreading Chinese soft power in Australia](#), and the questions that could be asked about them.

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