Envisioning Australia’s global positioning in education, training and research

International Education Symposium

LH Martin Institute/CSHE
The University of Melbourne
8 April 2011

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University relations in world context
International Student Enrolments, 1994 to 2010

Source: AEI, Market Information Data. September 2010

Trends in international education market shares, 2000 and 2008

Percentage of all foreign students enrolled, by destination

OECD countries
- 2000
- 2008

Partner countries
- 2000
- 2008

(1) Data relates to international students defined on the basis of their country of citizenship.
Higher Education Revenue by Source, 1939 to 2009

Distribution of international students, by field of education, 2008
Australia in University world rankings

ARWU top 200 universities 2010
distribution by country

United States, 90, 45%

Japan, 9, 5%

United Kingdom, 19, 9.5%

Germany, 14, 7%

Canada, 8, 4%

France, 7, 4%

Australia, 7, 4%

South Korea, 1, 1%

Others, 5, 3%

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ERA 2010: Field of Research (2 digit) rank of 5 by university

Mathematical Sciences
Physical Sciences
Chemical Sciences
Earth Sciences
Environmental Sciences
Biological Sciences
Agricultural and Veterinary Sciences
Information and Computing Sciences
Engineering
Technology
Technology
Medical and Health Sciences
Medical and Health Sciences
Built Environment and Design
Built Environment and Design
Education
Economics
Commerce, Management, Tourism and Services
Studies In Human Society
Psychology and Cognitive Sciences
Law and Legal Studies
Studies in Creative Arts and Writing
English Language and Literature
Culture, History and Archaeology
Philosophy and Religious Studies

Source: ARC, Excellence for Research in Australia 2010
Distribution of world population by income class, 2000 and 2030

Origins of the global middle class
Shares of global middle class consumption, 2000 to 2050

Trends in native speaker numbers for the world's largest languages expressed as the proportion of the global population who speak them
Adherents of major religions worldwide in billions, 2005

Projected growth in higher education international students (onshore + offshore), 2010 to 2020
Projected growth in onshore higher education international students, 2010 to 2020

Projected growth in offshore higher education international students, 2010 to 2020

Projected growth in onshore higher education students (domestic + international), 2010 to 2020

Projected growth in onshore international VET school and ELICOS students, 2010 to 2020
Dimensions of Australia’s positioning

i. cultural-strategic cooperation
ii. commercial services export
iii. knowledge network insertion

The ‘study in Australia’ paradigm

“the recruitment to home campuses of international students via differentiated regional and country strategies, conventional marketing techniques and commission agents”

(Walters & Adams, 2009).
The ‘diversified global’ paradigm

“Recruitment of students to a network of regional, global and virtual campuses through the creation of innovative international degree products, relationship and technology management”

(Walters & Adams, 2009).

Implications for strategy

- Australia’s knowledge institutions cannot be globally competitive by themselves.
- A one-way flow of international student traffic is unsustainable.
- Australia cannot function effectively in the world as a monolingual nation.
- Co-investment of Australian institutions overseas and foreign institutions in Australia is essential.
- Australia has to give to get. [See experience with EU Framework Programme]
- Australia needs to welcome and support international talent
- It is imperative for Australia to give greater attention to India and Indonesia
Implications for government policy

- Provider licensing regulations must be transparent and consistently enforced, proportional to risk.
- Education institutions must have flexibility to innovate and operate in the global competitive environment.
- Immigration policy should be open, fair and efficient.
- Australian scholarships need to enable Australians to study abroad and overseas students and researchers to study in Australia.
- Australian institutions need to invest and co-invest selectively offshore in education and research facilities.
- Australia should be open to foreign direct investment in education and research facilities.
- Australia must make a serious effort to develop multilingual skills among the population.
- Brand Australia needs to acknowledge and celebrate Australia’s differentiated capacities.