



Education New Zealand Briefing

Title: Competitors initiatives and policies to attract international students
Date: 28 July 2023 **Priority:** Medium
Security level: In Confidence **ENZ ID no:** 2324-007

Action sought

Addressee	Action sought	Deadline
Minister of Education	<p>Note New Zealand's key competitors to attract international students are Australia, Canada, Singapore, the United Kingdom and United States of America.</p> <p>Note there is significant variation in the key initiatives and policies used by the governments of New Zealand's key competitors to attract international students.</p> <p>Agree that this briefing be referred to the Minister of Immigration for information.</p> <p>Agree that this briefing be proactively released after you have considered it, as per your expectation that information be released as soon as possible.</p>	

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The following departments/agencies have seen this report

MoE NZQA MBIE MFaT TEC Other: INZ

Comments

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Executive Summary

International education delivers significant educational, economic, and social benefits to students and communities around the world. It is a highly competitive global industry that delivers on governments' broader objectives and priorities for their country across a range of areas including education, foreign affairs, the labour market, research and trade.

International education is a globally competitive industry with the intensity of competition growing as new competitors emerge. For New Zealand, international education has been dependent on attracting students to study in New Zealand.

Traditionally, our key competitors have been Australia, Canada, the United Kingdom (the UK) and the United States of America (the US), with a further addition of Singapore as an emergent player with a growing market share. These countries are most like New Zealand and are competing for the same pool of prospective international students who want to study in an English-speaking destination. The dynamic global environment for international education means that other countries may emerge as New Zealand's competitors in the future.

Our competitors' recovery has been variable and has reflected a multi-pronged approach with a mix of initiatives, increased investment and policy settings that reflect their government's broader objectives. At March 2023, overall international student numbers for New Zealand's competitors had recovered or exceeded pre-pandemic levels. Most of the recovery has disproportionality occurred in the higher education subsectors. However, it is too early to tell whether their recovery will be sustained over the long term.

Countries compete for international students based on the attractiveness of their overall offering that they offer to international students. Typically, prospective international students first select the country to study in. Building interest, awareness and preference for a study destination is important as international education providers can then build on country awareness/preference to promote themselves and their education offerings.

Scholarships, government subsidised tuition fees, bilateral education agreements and qualification recognition agreements can be used to deliver on government's broader priorities and objectives while also building awareness and preference, and overall supporting a country's international education sector.

To attract international students, countries undertake a range of global and tailored initiatives to raise awareness and preference, which can include running promotional campaigns, initiatives and events in-market to promote their education offerings. Initiatives can be



tailored to a specific market (such as through Australia's 'Shine in Australia' initiatives in Viet Nam) and can be enhanced by an in-market presence, targeted promotional initiatives and the presence of established in-market campuses. Along with education agents who are integral to international education globally, these all play a role in creating awareness and preference for a study destination.

For our competitors where the student experience is an important feature of the offering, foundational elements like a strategy focused on international education and code relating to the care of students play an important role. Melbourne has taken the Australian international education strategy's "students at the centre" priority further by achieving its aim to be Australia's number one city for student experience.

The policy setting for both study destinations and source markets affect international education and are driven by government's broader priorities and objectives. Changes to in-study work rights (Australia), ability of dependents to accompany the international student (the UK) and a policy change to no longer recognise online education delivery (China) are all recent policy changes made that affect international education offering. Broader policy reviews underway by Australia and the UK suggest that their settings may make their overall offering closer to New Zealand.

Each competitor has taken a multi-pronged approach to international education. There are area of similarities and differences between the competitors illustrating that there is not a "right mix" of initiatives and policies that will always lead to a sustainable recovery. There are also unique responses that reflect their government's broader priorities and objectives. Governments understand that international education can be used as a core enabler to achieve their broader objectives and are using international education to deliver these in a variety of areas including population, foreign policy and talent and skill attraction.

Each of New Zealand's competitors have clear and cohesive overall offering that reflects the global operating environment and their government's broader objectives and priorities. International students select where to study based on their awareness and preference for a study destination using a range of factors (including many that are influenced by policy settings). Therefore policy settings and initiatives to promote a study destination play a complementary role in the success of attracting international students.

Recommendations

Education New Zealand recommends that you:

- a. **note** New Zealand's key competitors to attract international students are Australia, Canada, Singapore, the United Kingdom and United States of America
- b. **note** there is significant variation in the key initiatives and policies used by the governments of New Zealand's key competitors to attract international students
- c. **agree** that this briefing be referred to the Minister of Immigration for information

agree / disagree



- d. **agree** that this briefing be proactively released after you have considered it, as per your expectation that information be released as soon as possible

agree / disagree



Grant McPherson
Chief Executive
Education New Zealand



Hon Jan Tinetti
Minister of Education
03/08 /2023

PROACTIVE RELEASE



Purpose

1. This briefing is in response to your request to understand the key initiatives and policies used by the governments of New Zealand's key competitors to attract international students and whether they have been successful in attracting international students. To provide a comparison, New Zealand's initiatives and policies are also included.
2. While the size of their international education sectors vary in size compared to New Zealand and each other, other characteristics mean that the competitors that are the focus of this briefing are:
 - Australia
 - Canada
 - Singapore
 - United Kingdom (the UK)
 - United States of America (the US).
3. The competitors are a mix of English-speaking countries that are traditionally identified as New Zealand's competitors along with an emerging competitor that is comparable to New Zealand i.e. Singapore. These countries are competing with New Zealand for the same pool of prospective international students.

Background

4. International education is made up of international and domestic students, academics and staff travelling internationally for study, along with delivering education products, services and approaches offshore. It encompasses different modes of education delivery (face-to-face, online, offshore and blended), research connections and partnerships with offshore institutions, and people building their global skills and knowledge in their studies.
5. International education intersects with priorities across many government portfolios. As a result, it contributes to governments strategies, objectives and priorities across education, foreign affairs, immigration, innovation, knowledge economy, population, research, science, socio-economic development, trade and tourism. For many governments their broader objectives are delivered through international education and consequently driving decision making in terms of policy settings and the types of initiatives they will undertake or support. For example, Canada has a long-term focus on growing its population through its' Immigration Levels Plans¹ which drives many of its policies.
6. International education operates in globally competitive environment and is highly sensitive to global demographic and policy changes that affect the flow of international students.² In 2020, there were 4.4 million international students enrolled in the OECD, accounting for 10% of all tertiary students. While the destinations of international students have diversified over the past decade, the main source countries have largely remained stable, with China and India accounting for 22% and 10% of all international tertiary students, respectively.³
7. Countries compete to attract international students on a range of factors focused on the attractiveness of their overall offering. International students' desire to study in an

English-speaking country is driven by various factors, but most are focused on either experiencing another culture or to succeed in their future career and life. Their top five motivations to study in an English-speaking country overseas⁴ are:

- To experience living in another country/culture (47%)
- Studying overseas would be a deliberate career step planned to improve my life, prospects and to earn a good living (43%)
- Studying overseas is a great opportunity to connect and understand other people (40%)
- Travelling around and experiencing a country in which I'm studying is very important to me (38%)
- My education is my pathway to being successful in life (34%).

8. For example, Singapore positions itself as a key educational hub in Asia by indicating that studying in Singapore offers a foreign student a rich experience – both academically and culturally.⁵

The current operating environment

International education strategies

9. There is considerable variability in the focus areas across competitors' international education strategies with Australia and New Zealand having a broader similar set of objectives:
- Some strategies are comprehensive while some are not, such as the US
 - The UK's strategy sets an enrolment target which it has already exceeded
 - Australia and the UK both set goals for online/blended/TNE education
 - Canada's strategy identifies priority markets
 - International student satisfaction is a particular focus for Australia and New Zealand
 - Outbound mobility is a priority for Canada and the UK
 - All the strategies talk about the diversity of students and/or student attraction markets
 - Australia, Canada and the UK identify the importance of having a sustainable sector, but only Australia's strategy (like New Zealand's) also talks about having a resilient sector
 - Canada's strategy includes a five-year pilot project to support up to 11,000 college and university undergraduate students to study or work abroad, with half of the funding provided to access international mobility opportunities and market diversification for underrepresented students e.g. low-income students, indigenous students and students with disabilities
 - Singapore does not have a strategy.
10. Appendix 1 provides a summary of New Zealand and its competitors international education strategies, economic value, market size, top five markets and QS world university rankings. While having an international education strategy is not a pre-requisite for having a successful international education sector, it helps to create a cohesive sector and informs other parts of their sector, such as education providers and education agents, what the government's focus is on achieving.

Recovery of international student enrolments

11. By March 2023, in contrast to New Zealand's experience, most major destinations for international students had experienced a significant recovery, mostly in their higher

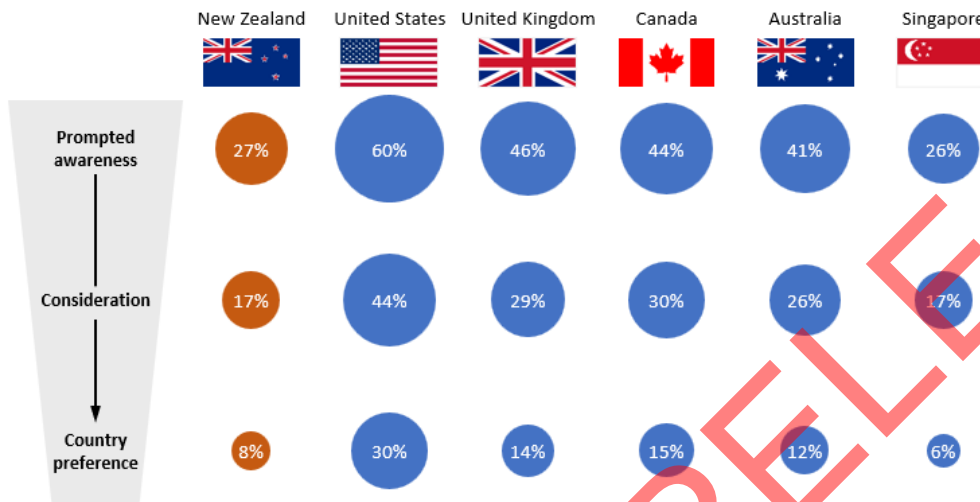
education sub-sectors. The recovery of each competitor's international education sector is likely to be due to a combination of policy settings, further investment in international education and new initiatives as outlined in this briefing that reflect their broader objectives and priorities. However, it is too early to tell whether the recovery will be sustained over the long term due to continuing changes to initiatives and policy settings along the uneven recovery across the various subsectors.

12. In higher education, Canada, Singapore and the UK had exceeded their 2019 international student numbers by March 2023. Australia and the US were close to reaching their pre-pandemic international student numbers.
13. The picture for the English language sub-sector is more comparable between countries with Canada, New Zealand, the UK and the US all having far fewer English language students than before the pandemic. While Australia is the exception where its English language sub-sector (known as ELICOS) has recovered to pre-pandemic levels⁶, but overall the recovery curve has been slower for the English language sub-sector in general than for higher education.
14. The school sub-sector is also starting to recover in Australia and Canada. In December 2022, 82,000 Canadian study permits had been issued for secondary level or below, compared to 63,745 in 2021⁷ and there had been 11,895 school enrolments⁸ in Australia for the April 2023 year to date compared to 21,291 for the April 2019 year to date.⁹
15. By March 2023, most competitors were making progress in diversifying the source countries for their international student enrolments, though many were relying heavily on the Indian market to make up for weaker Chinese outbound mobility at that time.¹⁰ In addition to significant growth in international student enrolments from India, significant growth has been experienced by:
 - Australia with international students from Thailand, Colombia, Brazil and Nepal
 - Canada with international students from the Philippines, Nigeria, Colombia, Mexico and Iran
 - The UK with international students from Nigeria, Pakistan, Bangladesh and United Arab Emirates
 - The US with international students from Bangladesh, Mexico, Japan and Nigeria.

The importance of awareness and preference for a study destination

16. Based on awareness¹¹ and preference¹² for study destinations by prospective international students, Canada and Australia have traditionally been New Zealand's main competitors with Singapore emerging as a new competitor since the start of the pandemic.

Student attraction brand funnel by country¹³



17. Like New Zealand, many competitor countries have government websites targeted at promoting the benefits of studying in their country that can easily be found online by searching “Study in [name of country]”. This is because typically prospective international students and their parents’ select the **country** to study in and then select either the **course or international education provider**. This means that building interest, awareness and preference as an education destination is a key feature in our competitor’s suite of initiatives to attract international students.

Initiatives to promote education to prospective international students

18. Australia, Canada, New Zealand, the UK and the US run campaigns, initiatives and events in-market to promote their education offerings and build awareness or preference for the country as a study destination. The initiatives and events can be tailored to a particular market, for example Austrade in Viet Nam uses the ‘Shine with Australia’ campaign with activities including TV talkshows, news articles, workshops and a magazine that highlights successful young Vietnamese who studied in Australia.¹⁴ These initiatives then enable education providers to promote themselves and their courses.

19. In addition, these campaigns can be enhanced by an in-market presence and targeted promotional initiatives. New Zealand’s competitors can have offshore offices similar to those of Education New Zealand. EducationUSA is a US Department of State network of over 430 international student advising centers¹⁵ in more than 175 countries and territories. Like all its centers, EducationUSA Malaysia offers accurate, comprehensive, and current information about opportunities to study at accredited post-secondary institutions in the US with advising centers in both Kuala Lumpur and Penang. EducationUSA Malaysia also hosts education fairs and events, and conducts workshops and presentations about studying in the US at public and private education institutions.

20. Like New Zealand, competitors usually have bilateral education agreements to support the broader bilateral relationship and government objectives. In addition to qualification recognition agreements, bilateral relationships can also support in-market promotional initiatives and events along with encouraging institutional and academic relationships.

21. In addition, education providers presence in-market through established campuses plays a key role in creating awareness and preference. For example, in addition to its own highly ranked universities (1 university is ranked in the top 10 of the QS World University Rankings), Singapore also hosts campuses for other countries universities, such as the Technical University of Munich (Asia), James Cook University and Yale-NUS College (a collaboration between Yale University and the National University of Singapore).
22. Regardless of policy settings and the types of initiatives used to promote themselves, New Zealand and its competitors will continue to build awareness and preference to attract prospective international students.

Use of education agents

23. Education agents are a key channel for attracting international students. They help prospective students find an institution with programs that meet their needs. In doing so, education agents promote countries, regions and education providers. Most education agents offer additional services which support students and their families and the international education sector.
24. All indicators point to a growing number of international students coming into schools and universities via education agents. A 2022 survey found 62% of US colleges are actively engaged with education agents, up from 49% in 2021 and 36% 2016.¹⁶ Before the pandemic, education agents were important for the recruitment of international students to Australia, Canada, New Zealand and the UK. By some estimates, nearly half of all foreign student in Canada had been referred by education agents and education agents accounted for three out of four international enrolments (75%) in Australian schools, vocational institutes, English-language training, and universities in 2018.
25. Most education agents positively contribute to the sector. However, a few education agents behaving poorly can also create issues for a country's international education sector, for example a 2022 TV documentary showed how education agents in India were promising students easy access to permanent residency in Canada after graduation. As part of developing a refreshed international education strategy in 2024, Global Affairs Canada¹⁷ is expected to ask about the possibility of agents being self-regulated by the sector or the possibility that an entity like the College of Immigration and Citizenship Consultants of Canada should be given responsibility for doing so.¹⁸
26. Australia, New Zealand and the UK are all signatories of the London Statement which provides a unifying set of understandings for the recruitment of, and related services provided to, students in international education which serve to promote best practice among education agents and consultants.
27. Australia, Canada, New Zealand, the UK and the US rely on education providers to monitor education agents' compliance, ethics and behaviour and undertake due diligence of agents. Only Australia requires mandatory agent training via its Qualified Education Agent Counsellor Course (QEAC). Australia offers "Aussie specialist" logos for Australian trained agents, in collaboration with their tourism colleagues. Canada, New Zealand, UK and US all offer voluntary training, although it is mandatory in the US for American International Recruitment Council (AIRC) accreditation.

28. To rebuild the number of international students enrolled in Western Australia, the State Government ran the International Education Agent Incentive Scheme. The Scheme provided \$10 million to be paid to eligible participating international education providers and disbursed as an additional top-up commission to agents for international student enrolments between 1 September 2022 and 30 June 2023. The Scheme paid \$1,000 (plus GST) per university enrolment and \$500 (plus GST) per school, ELICOS, VET or higher education enrolment.¹⁹ Anecdotal feedback indicates that the Scheme may not have been well received by education providers.
29. Education agents are an integral part of the global operating environment for international education. However, the extent to which the competitors engage with and/or support education agents should be considered in light of other initiatives and policy settings.

Use of scholarships

30. Scholarships are often used by governments to deliver on their broader priorities and objectives while still supporting their international education sector. Some countries offer scholarships to support developing countries, similar to New Zealand's Manaaki Scholarships programme which requires the scholarship recipient to return home after completing their study to support the development of their country. In addition, governments can use scholarships to support promotion and marketing initiatives, for example Canada offers 700+ "Study in Canada Scholarships"²⁰ which aim to help Canadian education providers to attract Bachelor's, Master' and PhD international students for short-term exchanges for study or research.
31. Australia's 'New Colombo Plan' is an initiative to lift knowledge of the Indo-Pacific in Australia by supporting Australian undergraduates to study and undertake internships in the region. The Plan is also intended to deepen Australia's relationships in the region and reflect the importance of reciprocity in international education, while also supporting building Australian's skills and work-based experiences to contribute to the Australian and the regional economies.²¹
32. Scholarships also play a pivotal role in universities recruitment strategies to enable them to attract top talent and enhance their global reputation. A notable trend for Australian universities has been the increase in country-specific scholarships, rather than employing a generalised approach, by focusing on specific markets such as India, Indonesia, Malaysia, Vietnam, and Sri Lanka. This shift has been driven by the need to target scholarship-driven markets and increase diversity in international student populations.²²

Visa classes for international students

33. Nearly all competitors have one or two main visa classes (Appendix 2 outlines the main classes) for international students that enable them to remain in the country to study.²³ Student and post-study work visas also form part of government's broader immigration system.
34. In almost every destination, immigration officials want to see that international students have enough money for tuition, accommodation, and living expenses for at least one year. New Zealand is the only country that requires international students to have paid

for the first year's tuition and it also requires that the student have more extensive insurance coverage than its competitors.

35. Visa processing timeframes are one of the factors in considering where to study. International students and education agents check processing times frequently and what they see can influence country choice for the international students the education agents work with. In most destinations (with the exception of Canada²⁴), visa processing times are shorter in 2023 than they had been. The time it takes to get a visa still varies greatly depending on country. For example, it takes about a week to get a visa for Singapore whereas it normally takes longer for Australia (for example 90% of Australian higher education visas are processed within 10 months). In comparison, the current (1 August 2022 to 11 July 2023) average visa processing time for New Zealand is approximately 51% decided between 0-20 days and 90% decided in 56 working days.

Policy settings

36. To remain competitive within the top 5-6 English-speaking study destinations, a country needs to have a comparable overall offering that is seen as high value by prospective international students and delivers what they are looking for while delivering on a government's broader objectives and priorities.
37. Changes to policy settings to attract international students and deliver on their (federal and state level) government's objectives along with responses to the pandemic varied between countries. This means that it is hard to compare the 2020-2022 period for international student enrolments.
38. According to the Ministry of Business, Innovation and Employment (MBIE), information from Migration 5 partners is that student visa programmes have seen substantial growth in recent years, with increasing levels of fraud and non-genuine students being identified. This aligns with media reporting that more recently countries like the UK and Australia²⁵ have been reviewing their immigration settings that suggest changes to their policy settings that may make their offerings closer to New Zealand's. Appendices 3 and 4 set out the in-study and post-study work rights policies at March 2023.
39. On the other hand, policy changes by source markets for international students have also had implications for the international education sector (e.g. changes in the Chinese Government's policy to no longer recognise online study).
40. In-study and post-study work rights are an integral part of the education offering for international students. For students, employability has been found to be key factor in deciding to study overseas and choosing where to study.²⁶ Working while studying is used by both domestic and international students to supplement income and gain work experience and skills.
41. This is because employability is a key expected return on investment for an international education experience, by students, their families, providers and governments.²⁷ Employability does not just refer to employment opportunities in the country of study, but also in their home country or a third country.

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In-study work rights

44. Not all international students in competitor countries qualify for in-study work rights. The types of international students who gain work rights tend to be undertaking longer study periods at the tertiary level.
45. The number of hours worked varies between competitors. In response to labour shortages as at March 2023, both Australia and Canada had temporarily removed the limit on the number of hours worked while class was in session for international students holding in-study work rights. While this was welcomed by Australian businesses, some education stakeholders were concerned that it “may adversely hamper the achievement of the main goal of international students — that is completing their courses satisfactorily”.³⁰ New Zealand’s in-study work rights were reviewed but not changed through the Immigration Rebalance.

Post-study work rights

46. In addition to general temporary work visas, countries can offer specific temporary work visas following the completion of study as part of the overall offering to attract international students. The broader government objectives can be reflected in post-study work rights policies can include concerns about ageing populations, global competition for international students and skills gaps in a country. As a result, the governments of Australia, Canada and the UK have extended post-study work rights in recent years.
47. The US, where post-study work rights are more restricted than the other competitors, has extended work rights for international STEM students in recent years reflecting its focus on retaining international students who complete study in these subjects.
48. International students in Singapore can apply to have their tuition fees subsidised for study at specified institutes of higher learning in return for being contractually obliged to work in a Singapore entity for three years after graduation. The Singapore Government’s Tuition Grant Scheme is intended to help students manage the costs of full-time tertiary education, but also enables international students to contribute to meeting Singapore’s talent and skills needs.³¹
49. New Zealand’s changes to post-study work rights, as part of the Immigration Rebalance, were intended to keep New Zealand’s education offerings open to genuine students while aiming to reduce the risk associated with education being used as a pathway to residence for migrants in lower-skilled and lower-paid roles.



International student wellbeing and experience

50. International students are often young, have different cultural backgrounds, and live away from their families, communities, and social networks. They are also vulnerable to exploitation as a group that pays high tuition fees. For New Zealand's competitors where the student experience is important feature of the offering, their foundational elements such as having a code for the care of international students plays an important role.
51. New Zealand has had a pastoral care code for international students for two decades to protect international students' wellbeing and safety. New Zealand's first Code of Practice for the Pastoral Care of International Students was world leading when it was introduced in 2002. The current code, the Education (Pastoral Care of Tertiary and International Learners) Code of Practice 2021, supports the wellbeing of international learners enrolled with New Zealand education providers, including schools. The code also supports New Zealand's reputation as a safe and desirable study destination.
52. Like New Zealand, Australia and the UK have a code of practice for education providers to support the wellbeing of international students and explicitly calls out international students' wellbeing and experience. The Australian international education strategy identifies "students at the centre" as one of four priorities for international education. Australia's focus on the international student experience is illustrated by Melbourne which is "working hard to become Australia's number one city for student experience because we know how much they [international students] add to our culture, atmosphere and economy".³² Since 2015, QS has ranked Melbourne as Australia's best student city with it also moving up the overall global rankings. StudyMelbourne uses the tagline "Australia's best student city" and takes prides in being a welcoming and safe student city that delivers an unforgettable student experience.³³
53. The international education strategies for the UK and the US positions themselves as being focused on welcoming international students. The US strategy has 10 principles of support, one of which includes "a welcoming environment for international students coming to the United States..."

Conclusion

54. In summary, New Zealand 's competitors have continued to undertake a variety of different initiatives recognising their unique context and broader government objectives and the global landscape. Their international education sectors have recovered post-pandemic at different rates reflecting their various broader policy settings and level of investment.
55. Global and in-market promotional initiatives are complementary to the overall offering in raising awareness and preference. Countries use a variety of initiatives to successfully position their international education offering to drive awareness and preference in a highly competitive global market.
56. Most of New Zealand's competitors seem to have a clear overall offering that they offer to international students during and post study. Their initiatives and policy settings promote and deliver a cohesive overall offering. As a result, their offering is easily

marketable in a highly competitive global environment and in countries where English is not the most common spoken language.

57. For our competitors where the student experience is an important feature of the offering, foundational elements like a strategy focused on international education and code relating to the care of students play an important role. Also more broadly, governments are also clear how international education is a core enabler and delivers on their broader objectives, such as foreign policy and talent and skills needs.
58. In the end, a country's overall offering can be appealing, but the final decision of where and with whom to study rests with prospective international students, and their perceptions of the country and its offering. Therefore, driving student preference is a key focus for all our competitors and for New Zealand.

PROACTIVE RELEASE

Appendix 1: Background information on New Zealand and key competitors

	New Zealand	Australia	Canada	Singapore	UK	US																																																																																										
Strategy	<p>New Zealand International Education Strategy 2022-2030</p> <p><i>Focus Areas</i></p> <ul style="list-style-type: none"> Help providers of international education to build back onshore offerings Building a new international education future <p><i>Goals</i></p> <ul style="list-style-type: none"> Excellent education and student experience Sustainable and resilient Global citizens 	<p>Australian Strategy for International Education 2021–2030³⁴</p> <p><i>Priorities</i></p> <ul style="list-style-type: none"> Diversification Meeting Australia's skills needs Students at the centre Growth and global competitiveness 	<p>Building on Success: International Education Strategy (2019–2024)³⁵</p> <p><i>Key objectives</i></p> <ul style="list-style-type: none"> Encourage Canadian students to gain new skills through study and work abroad opportunities in key global markets, especially Asia Diversify the countries from which international students come to Canada, as well as their fields, levels of study, and location of study within Canada Increase support for Canadian education sector institutions to help grow their export services and explore new opportunities abroad 	No current strategy.	<p>International Education Strategy (2019): global potential, global growth³⁶</p> <p><i>Ambitions to achieve by 2030</i></p> <ul style="list-style-type: none"> Increase education exports to £35 billion per year Increase the numbers of international higher education students studying in the UK to 600,000 per year 	<p>Succeeding Globally Through International Education and Engagement³⁷</p> <p><i>Goals</i></p> <ul style="list-style-type: none"> Strengthen US education Advance US international priorities <p><i>Objectives</i></p> <ul style="list-style-type: none"> Increase global and cultural competencies of all US students Learn from and with other countries to strengthen US education Engage in active education diplomacy to advance US international priorities 																																																																																										
Economic value	<table border="1"> <thead> <tr> <th>Year</th> <th>NZ\$</th> <th>US\$</th> </tr> </thead> <tbody> <tr> <td>2022</td> <td>790m (est)³⁸</td> <td>491.2m</td> </tr> <tr> <td>2019</td> <td>3.7b³⁸</td> <td>2.3b</td> </tr> </tbody> </table>	Year	NZ\$	US\$	2022	790m (est) ³⁸	491.2m	2019	3.7b ³⁸	2.3b	<table border="1"> <thead> <tr> <th>Year</th> <th>A\$</th> <th>US\$</th> </tr> </thead> <tbody> <tr> <td>2022</td> <td>25.5b³⁹</td> <td>17b</td> </tr> <tr> <td>2021</td> <td>21.4b</td> <td>14.3b</td> </tr> </tbody> </table>	Year	A\$	US\$	2022	25.5b ³⁹	17b	2021	21.4b	14.3b	<table border="1"> <thead> <tr> <th>Year</th> <th>CA\$</th> <th>US\$</th> </tr> </thead> <tbody> <tr> <td>2020</td> <td>15.7b⁴⁰</td> <td>11.9b</td> </tr> <tr> <td>2018</td> <td>22.3b⁴⁰</td> <td>16.4b</td> </tr> </tbody> </table>	Year	CA\$	US\$	2020	15.7b ⁴⁰	11.9b	2018	22.3b ⁴⁰	16.4b	Not available	<table border="1"> <thead> <tr> <th>Year</th> <th>£</th> <th>US\$</th> </tr> </thead> <tbody> <tr> <td>2020</td> <td>21.2b⁴¹</td> <td>25.8b</td> </tr> <tr> <td>2019</td> <td>21b</td> <td>25.5b</td> </tr> </tbody> </table>	Year	£	US\$	2020	21.2b ⁴¹	25.8b	2019	21b	25.5b	<table border="1"> <thead> <tr> <th>Year</th> <th>US\$</th> </tr> </thead> <tbody> <tr> <td>2021 Higher education</td> <td>32b⁴²</td> </tr> <tr> <td>2021 English language</td> <td>633.6m⁴³</td> </tr> </tbody> </table>	Year	US\$	2021 Higher education	32b ⁴²	2021 English language	633.6m ⁴³																																																
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Appendix 2: Main visa classes for international students

	New Zealand	Australia	Canada	Singapore	UK	US
Name	Fee-Paying Student Visa ⁵⁵	Student Visa (Subclass 500) ⁵⁶	Study Permit ⁵⁷	Student's Pass (higher education studies) ⁵⁸	Student Visa ⁵⁹	F-1 or M-1 Student Visa ⁶⁰
Definition		Allows students to live, work and study in Australia for a maximum of five years, in line with the duration of their course.	Students receiving a study permit are permitted to study at a designated learning institution (DLIs) in Canada. This is not a "visa" <i>per se</i> but rather a permit all students in courses of at least 6 months must have to study in Canada.	For foreigners who have been accepted for admission as a full-time matriculated or registered student at a specified institute of higher learning in Singapore.	This visa applies to students in English-language courses at the B2 level or above as well as those pursuing part-time or full-time non-degree and degree programmes	The F-1 visa is students coming to the US for higher education, elementary/high school or language studies. The M-1 visa is for vocational education.
Application fee	NZ\$375 (US\$229)	A\$650 (US\$428) unless students are exempt.	C\$150 (US\$108)	S\$30 (US\$32) application fee and S\$60 (US\$64) issuance fee	£363 (US\$433) plus the "healthcare surcharge" ⁶¹	US\$160 (plus a Student and Exchange Visitor program fee of US\$350)
Processing times at March 2023	Within 45 days. <i>Updated processing times for 1 August 2022 – 11 July 2023</i> Average processing time is 28 days (approx. 6 weeks) with approx. 51% decided between 0-20 days and 90% in 56 working days.	<ul style="list-style-type: none"> 90% of ELICOS (English language) visas processed within 4 months 90% of schools visas processed within 9 months 90% of higher education visas processed within 10 months 90% of postgraduate research visas processed within 12 months 90% of VET visas processed within 14 months 	10 weeks. Students from some countries can access the Student Direct Stream which provides faster processing times (usually within 20 days) for a fee "from C\$150". The stream has been a major lever for Canada in attracting students from priority countries.	About 1 week	Within 3 weeks	Students often hear immediately after their interview with a US immigration official whether they have been approved for a visa or not. The wait time was about 25 days for an interview. ⁶²
Fund requirements at the time of visa application	<ul style="list-style-type: none"> \$17,000 annually for compulsory sector school students \$20,000 (US\$12,246) annually for all other international students <p>The first year's tuition must be paid in full.</p>	Course fees plus A\$21,041 (US\$14,400) per year	CA\$10,000 (US\$7,233) per year	1 year of tuition fees as well as S\$8,400 living expenses (US\$6,217)	<ul style="list-style-type: none"> £1,334 (US\$1,590) per month (for up to 9 months) for courses in London £1,023 (US\$1,220) per month (for up to 9 months) for courses outside London 	Financial resources to cover the estimated fees and living expenses for the first year of the program (estimates vary by institution).
Notes	<p>Except for PhD students, the visa is normally awarded for the length of time the tuition fees have been paid for the student's study programme.</p> <p>International students aged under 10 years must come with a parent (who is granted a Guardian visa).</p> <p>According to MBIE, New Zealand has been more conservative than partner countries in certain aspects of student visa applications, namely the financial assessments to ensure that students who come to New Zealand are able to concentrate on their studies, be safe and well.</p>		Once a study permit is approved, students are provided with either a visitor visa or an electronic travel authorisation for students coming from visa-exempt countries.	There are other types of student pass for other types of students.		Getting a student visa consists of two steps: (i) submitting the application and (ii) undergoing an interview with US immigration officials.

Appendix 3: In-study work rights as at March 2023

Note that any types of international students not mentioned in the table below means that they do not qualify for in-study work rights.

	New Zealand ⁶³	Australia ⁶⁴	Canada ⁶⁵	Singapore ⁶⁶	UK ⁶⁷	US
Policy setting	<p><i>Research-oriented Master's or PhD students</i> No limit.</p> <p><i>Other tertiary students</i> Most studying a programme that leads to a Level 5 qualification or higher may work up to 20 hours a week.</p> <p><i>English-language students</i> May work for up to 20 hours a week while studying a full-time course of at least 14 consecutive weeks duration at a Category 1 provider⁶⁸.</p> <p><i>Secondary school students</i> Can work up to 20 hours a week during the school year with parental and school permission, if they are aged 16 years or older and studying in year 12 or 13.</p>	<p>All international students may work unrestricted hours in any sector of the economy and can work before their course of study begins.</p> <p>They must:</p> <ul style="list-style-type: none"> • Maintain their course enrolment • Ensure satisfactory course attendance • Ensure satisfactory course progress <p>Note that this policy was intended to help fill labour shortages.</p>	<p><i>Until 31 December 2023</i> May work more than 20 hours per week off-campus while class is in session if:</p> <ul style="list-style-type: none"> • they are a full-time student at a designated learning institution • they are enrolled in a post-secondary academic, vocational or professional training program or a secondary-level vocational training program (Quebec only) • the study program is at least 6 months long and leads to a degree, diploma or certificate • they have started studying • they have a Social Insurance Number <p>Note that this policy was intended to help fill labour shortages.</p>	<p>Must have a Work Pass Exemption and all other necessary requirements to make work and study possible. Then full-time international students may work for a maximum of 16 hours per week while attending a government-approved college or university.</p>	<p>Students on full-time degree-level courses holding a student visa are permitted to work part-time in the UK.</p> <p>Part time means up to 20 hours per week during university term time, where a "week" is a 7-day period (defined as Monday to Sunday).</p>	<p><i>F-1 student visa⁶⁹ only</i> <i>First year</i> Can work on-campus under certain conditions in their first year of studies, but not off-campus (with rare exceptions).</p> <p><i>From second year</i> Can work off-campus through one of the following programmes related to their field of study:</p> <ul style="list-style-type: none"> • Pre-completion Optional Practical Training (20 hours a week or less) • Curricular Practical Training which can be full-time (but are often part time).
Scheduled breaks (with a visa enabling in-study work rights)	<p>Those studying for an academic year or longer can work full-time during scheduled vacations.</p>	<p><i>From 30 June 2023</i> Can work unlimited hours during their holiday breaks.</p>	<p>Can work full-time if they are on a scheduled break (e.g. winter and summer holidays, or a fall or spring reading week).</p> <p>Can also work overtime or work two part-time jobs that add up to a higher than usual number of hours.</p>	<p>Full-time international students can work unlimited hours during holidays/breaks.</p>	<p>Can work full-time during breaks and vacations.</p>	<p><i>F-1 student visa only</i> Can work full-time during school break periods (up to 40 hours per week) on-campus only.</p>
Policy changes to note		<p><i>From 30 June 2023</i> International students can work up to 48 hours per fortnight during term time (unless they are a PhD student).</p> <p>Not permitted to work before their period of study begins.</p>	<p><i>Previous policy</i> International students meeting the above conditions (for the current policy) to work off-campus for up to 20 hours per week.</p> <p>Could also work overtime or work two part-time jobs that added up to a higher than usual number of hours.</p>			

Appendix 4: Post-study work rights as at March 2023

	New Zealand ⁷⁰	Australia ⁷¹	Canada ⁷²	Singapore ⁷³	UK ⁷⁴	US ⁷⁵
Visa type	Post-study Work Visa	<p>Post-study work stream From 1 July 2023, graduates of some programmes will receive longer post-study work rights to help “address Australia’s critical skill shortages”.</p> <p>Second post-study work stream Graduates with a degree from an Australian institution campus in a designated rural area, who have already held a temporary graduate visa and lived in the designated rural area for at least 2 years.</p> <p>Graduate work stream The graduate must prove that their qualification is related to a skill on the relevant skilled occupation list.</p>	Post-graduation Work Permit	Long-term Student Pass Allows students to look for a job with pass holders not allowed to take any type of employment while they are on this pass.	UK Graduate Route	Optional Practical Training (OPT) visa OPT work must be full-time, completed within 14 months after degree completion, and be in a job related to the field of study. A student on post-completion OPT can be unemployed for a total of 90 days with officials able to terminate the visa of a student who accrues 90 total days of unemployment.
Duration	<ul style="list-style-type: none"> Master’s and PhD graduates: 3 years Level 8 or Bachelor’s degree: Same length of time as their study in New Zealand up to 3 years. Non-degree tertiary study (Level 7 and below excluding Bachelor’s degrees) are only eligible if the qualification is relevant to an occupation on the Green List⁷⁶ 	<p>Post-study work stream: 2-6 years, depending on degree level and type of degree.</p> <p>Second post-study work stream: 1-2 years in addition to the time spent on the temporary graduate visa.</p> <p>Graduate work stream: up to 18 months</p>	8–36 months, depending on the qualification	12 months	<ul style="list-style-type: none"> 24 months for bachelor’s and master’s degrees 3 years for PhD 	OPT: 12 months OPT visa (up to 36 months for STEM students via a renewal process) ⁷⁷
Minimum credential required	<ul style="list-style-type: none"> Non-degree tertiary study (Level 7 and below excluding Bachelor’s degrees) are only eligible if the qualification is relevant to an occupation on the Green List and are restricted to working in that occupation Bachelor’s degree and Levels 8-10: no qualification or occupation restrictions 	<p>Post-study work stream: Bachelor’s degree</p> <p>Second post-study work stream: Bachelor’s degree</p> <p>Graduate work stream: programmes lasting at least two years</p>	Diploma/certificate	Being a graduate of an accredited Singapore Institute of Higher Learning	Bachelor’s degree	OPT: Certificate
Minimum study time	30 weeks of full-time study in New Zealand.	2 years	8 months Students can complete up to 50% of their programme online and overseas, but their time studying outside Canada will not be counted towards eligible time on the visa. From 1 September 2023, students must complete at least 50% of their programme in-class in Canada. ⁷⁸		12 months	OPT: 12 months

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- ¹ [An Immigration Plan to Grow the Economy](#), media release by the Minister of Immigration, Refugees and Citizenship (November 2022).
- ² *New Zealand International Education Strategy 2022-2030*.
- ³ *International Migration Outlook 2022*, OECD (2022).
- ⁴ *Understanding perceptions of New Zealand as a study destination*, Kantar (2022). The survey respondents were 16-25 years old and interested in studying overseas.
- ⁵ <https://www.mfa.gov.sg/Overseas-Mission/Vientiane/Studying-in-Singapore>
- ⁶ <https://thepienews.com/news/australia-elicos-sector-sees-remarkable-recovery/>
- ⁷ <https://thepienews.com/news/international-students-canada-2022/>
- ⁸ Enrolments show what courses international students are studying across Australia's different education sectors. There are more enrolments than students since a student can study in more than one course in one calendar year.
- ⁹ <https://www.austrade.gov.au/australian/education/education-data/current-data/summaries-and-news>
- ¹⁰ Chinese outbound have increased in 2023 now that the Chinese government is no longer accepting foreign credentials earned online by students.
- ¹¹ The question asked to measure awareness is "Which of these countries were you aware of as a possible study destination?" The list of countries provided to those surveyed are Australia, Canada, China, Ireland, New Zealand, Malaysia Singapore, the Philippines, the UK and the US.
- ¹² The question asked to measure preference is "Please enter 1 for your most preferred country, 2 for your next most preferred destination etc...". This is asked after asking "Which of these countries were you aware of as a possible study destination?" to measure awareness and then asking "Which of these countries would you consider as possible study destinations for you?"
- ¹³ *Understanding perceptions of New Zealand as a study destination*, Kantar (2022).
- ¹⁴ <https://vietnamnews.vn/society/1522696/shine-with-australia-magazine-launched-in-viet-nam.html>
- ¹⁵ The centers promote US higher education to students by offering accurate, comprehensive, and current information about opportunities to study at accredited post-secondary institutions in the US. The advisers provide information on a host of topics, including the admissions process and standardised testing requirements, how to finance a US education, the student visa process and preparing for departure to the US. The centers also offer funding, support US education providers and work closely with partners such as Fulbright.
- ¹⁶ <https://monitor.icef.com/2023/05/nearly-two-thirds-of-us-colleges-now-working-with-agents/>
- ¹⁷ Global Affairs Canada is responsible for advancing Canada's international relations, including developing and implementing foreign policy; fostering the development of international law, international trade and commerce; providing international assistance; providing consular services for Canadians; and overseeing the Government of Canada's global network of missions abroad. The International Education Division of Global Affairs Canada seeks to enhance Canada's profile abroad and attract international students to Canadian education institutions.
- ¹⁸ <https://www.casita.com/news/canadas-new-international-education-strategy-to-review-agents-roles>
- ¹⁹ This was part of a broader A\$41.2m package in 2022/23 to revitalise the State's international education sector. The State Government targeted further growth in international students in 2023/24 after announcing an additional A\$13.1m investment in the sector which had surpassed pre-Covid enrolment levels.
- ²⁰ <https://www.educanada.ca/scholarships-bourses/can/institutions/study-in-canada-sep-etudes-au-canada-pct.aspx?lang=eng>
- ²¹ <https://www.dfat.gov.au/people-to-people/new-colombo-plan>
- ²² *The Importance of Scholarships for Universities*, Studymove (29 June 2023). <https://www.studymove.com/index.php/news/17-key-data/94-international-student-scholarships-in-2023>
- ²³ Like New Zealand, the competitors have visa waiver schemes for specific countries where a foreign national can enter in order to enter and stay for a short time without being required to apply for a visa. For example, the passport holders of some countries/territories do not have to apply for a visa to undertake short-term study before they travel to New Zealand but must hold a New Zealand Electronic Travel Authority to enter New Zealand.
- ²⁴ <https://www.settler.ca/english/the-latest-ircc-processing-times-february-2023/>
- ²⁵ In April 2023, the Australian Minister of Home Affairs noted that the Government would look at tightening the requirements for international students studying in Australia and ensuring that students were there to study.
- ²⁶ QS (2020). *International Student Survey: Volume 2: Information and Influence*.
- ²⁷ *Global perspectives on international student employability*, B. Berquist, R. Hall, S. Morris-Lange, H. Shields, V. Stern & L. Tran (2019).

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- 28 QS (2020). *International Student Survey: Volume 2: Information and Influence*.
- 29 *Global perspectives on international student employability*, B. Berquist, R. Hall, S. Morris-Lange, H. Shields, V. Stern & L. Tran (2019).
- 30 <https://thepienews.com/news/unlimited-work-hours-for-international-students-could-damage-australian-reputation/>
- 31 <https://tgonline.moe.gov.sg/tgis/normal/index.action>
- 32 <https://thepienews.com/news/melbourne-international-student-global/>
- 33 <https://www.studymelbourne.vic.gov.au/>
- 34 <https://www.education.gov.au/australian-strategy-international-education-2021-2030/resources/australian-strategy-international-education-2021-2030>
- 35 <https://www.international.gc.ca/education/strategy-2019-2024-strategie.aspx?lang=eng>
- 36 <https://www.gov.uk/government/publications/international-education-strategy-2022-update/international-education-strategy-2022-progress-update>
- 37 <https://sites.ed.gov/international/files/2022/04/ED-IAO-International-Education-Strategy-2022.pdf>
- 38 *Broader benefits of international education for New Zealanders*, Ernst and Young (2022).
- 39 Australian Bureau of Statistics.
- 40 https://www.international.gc.ca/education/assets/pdfs/EDURESEARCH-Impact_COVID-19-Executive-Summary-eng.pdf
- 41 <https://explore-education-statistics.service.gov.uk/find-statistics/uk-revenue-from-education-related-exports-and-transnational-education-activity>
- 42 <https://www.iie.org/news/us-sees-strong-international-student-enrollment-rebounds/>
- 43 English language IEPs (individualised education programs):
<https://studytravel.network/magazine/articles/29409?subTypeId=29&statsOnly=1>
- 44 Includes the number of international students studying outside Australia.
- 45 Includes student pass holders in all school types, including schools under the Ministry of Education, universities, polytechnics, and private education institutions.
- 46 ICEF monitor.
- 47 ICEF monitor.
- 48 Include higher education, language studies and K-12.
- 49 <https://www.education.gov.au/international-education-data-and-research/international-student-numbers-country-state-and-territory>
- 50 <https://monitor.icef.com/2023/02/canadas-foreign-enrolment-grew-by-more-than-30-in-2022/>
- 51 <https://www.trade.gov/country-commercial-guides/singapore-education> (note that while the webpage was available in March 2023, it is currently unavailable)
- 52 <https://monitor.icef.com/2023/01/uk-foreign-enrolment-takes-another-leap-driven-by-students-from-china-india-and-nigeria/>
- 53 <https://monitor.icef.com/2022/11/foreign-enrolment-in-us-rebounded-in-2021-22-and-is-approaching-pre-pandemic-levels/>
- 54 QS do not consider all tertiary institutions for every country in the rankings, so the proportion of total institutions in the top 500 reflects only the proportion of those institutions included in the full QS rankings. For example, the US has over 4,000 higher education institutions, yet only 198 were considered for the QS rankings.
- 55 <https://www.immigration.govt.nz/new-zealand-visas/visas/visa/full-fee-paying-student-visa>. Short term study can also be undertaken on a visitor visa or after entering with a New Zealand Electronic Travel Authority from a visa-free country.
- 56 <https://www.studyaustralia.gov.au/english/latest-travel-and-visa-advice/updates/step-by-step-guide-to-visa-and-entry-requirements>
- 57 <https://www.canada.ca/en/immigration-refugees-citizenship/services/study-canada/study-permit.html>
- 58 <https://www.ica.gov.sg/reside/STP/apply/ihl>
- 59 <https://www.gov.uk/study-uk-student-visa>
- 60 <https://travel.state.gov/content/travel/en/us-visas/study/student-visa.html>
- 61 <https://www.gov.uk/healthcare-immigration-application/pay>
- 62 <https://www.applyboard.com/applyinsights-article/us-student-visa-wait-times-improving-into-2023>
- 63 <https://www.immigration.govt.nz/new-zealand-visas/options/study/working-during-after-your-study/working-on-a-student-visa#:~:text=Part%2Dtime%20work,the%20Skilled%20Migrant%20Category%2C%20or>
- 64 <https://www.education.gov.au/international-education/rights-international-students-work> and <https://immi.homeaffairs.gov.au/visas/getting-a-visa/visa-listing/student-500/temporary-relaxation-of-working-hours-for-student-visa-holders>

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- ⁶⁵ <https://www.canada.ca/en/immigration-refugees-citizenship/services/study-canada/work/work-off-campus.html#who-can> and <https://arrivein.com/immigration/how-to-bring-your-family-to-canada-as-an-international-student/>
- ⁶⁶ <https://www.isamigrations.com/work-and-study-in-singapore/>, <https://studyabroad.shiksha.com/part-time-work-options-in-singapore-for-indian-students-articlepage-965> and <https://www.mom.gov.sg/passes-and-permits/work-pass-exemption-for-foreign-students#:~:text=Once%20you%20have%20completed%20your,apply%20for%20your%20work%20pass>
- ⁶⁷ <https://www.academiceducation.co.uk/work-in-the-uk-while-studying/> and <https://www.idp.com/canada/faqs/how-many-hours-can-i-work-while-studying-in-the-uk/5AuEpbkYQdBIKFcemDWKT/>
- ⁶⁸ <https://www.nzqa.govt.nz/providers/index.do>
- ⁶⁹ <https://monitor.icef.com/2022/11/summing-up-international-student-work-rights-in-13-top-study-destinations/>
- ⁷⁰ <https://www.immigration.govt.nz/new-zealand-visas/preparing-a-visa-application/working-in-nz/qualifications-for-work/green-list-occupations>
- ⁷¹ <https://immi.homeaffairs.gov.au/visas/getting-a-visa/visa-listing/temporary-graduate-485#:~:text=Post%2DStudy%20Work%20stream,and%20study%20in%20Australia%2C%20temporarily.&text=Usually%20between%202%20and%204%20years%2C%20depending%20on%20your%20qualification>
- ⁷² <https://www.canada.ca/en/immigration-refugees-citizenship/services/study-canada/work/after-graduation/eligibility.html>
- ⁷³ <https://www.ica.gov.sg/reside/LTVP/apply>. There are also two work visas available which are not strictly post-study work visas (S-Pass for mid-skilled workers e.g. technicians, analysts, accountants, journalists, etc and Employment pass which an employer or appointed employment agent needs to apply for on behalf of the candidate).
- ⁷⁴ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1006443/Graduate_Immigration_Route_guide_July_2021.pdf. There is also a work visa which is not strictly a post-study work visa (the Skilled Worker Route).
- ⁷⁵ [https://internationaloffice.berkeley.edu/h-1b_faqs#:~:text=H%2D1B%20status%20is%20available,this%20degree%20\(or%20higher\)](https://internationaloffice.berkeley.edu/h-1b_faqs#:~:text=H%2D1B%20status%20is%20available,this%20degree%20(or%20higher)) and <https://www.uscis.gov/working-in-the-united-states/h-1b-specialty-occupations>
- ⁷⁶ <https://www.immigration.govt.nz/new-zealand-visas/visas/visa/post-study-work-visa#https://www.immigration.govt.nz/new-zealand-visas/preparing-a-visa-application/working-in-nz/qualifications-eligible-for-a-post-study-work-visa/slider>
- ⁷⁷ An OPT permission of 3 years post-graduation is now available to F-1 students in 22 new fields of study. In 2022/23, degree-seeking J-1 students and graduates in STEM fields can remain in the US for 3 years. Prior to this, the cap had been 18 months of work allowance for J-1 students.
- ⁷⁸ <https://www.canada.ca/en/immigration-refugees-citizenship/services/study-canada/work/after-graduation/eligibility.html>