


Innovators forge a brave new world for international education

JUSTIN BOKOR

By **JUSTIN BOKOR**

8:33PM OCTOBER 10, 2023 •  NO COMMENTS

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The luminaries of the international education world have descended on Adelaide for the sector's annual conference, no doubt buoyed by the post-pandemic surge in demand.

The theme of the conference is the role of innovation in transforming the experiences of students and their communities.

But what about the impact of innovation on the market? How will it look different a decade from now – and how should universities position themselves to thrive in the new landscape?

First, we know the market will be bigger. Tertiary education participation rates in key sources markets – China (26 per cent), East Asia (23 per cent), India (13 per cent), Latin America (24 per cent) and the Middle East / North Africa (22 per cent) – remain a fraction of those across the OECD (40-50 per cent). As participation

continues to grow, tens of millions more young adults will enter post-secondary education.

Many of these students will head abroad, seeking the economic, security and lifestyle advantages of the leading destination countries, but the major innovations and disruption will occur in home markets.

The Covid pandemic offered a foretaste of this as large numbers of international students stayed home and completed degrees online. Not all bonds between international education and travel abroad have been broken but the pandemic has begun a one-way loosening of them in the same way work from home is now an undeniable reality of post-pandemic professional life in Australia.

An even greater disruption looms on the horizon – the weakening of the nexus between English language and international education.

Countries such as China and Japan have been expanding their share of international education slowly, restrained by the demand for English-language education.

As artificial intelligence tools unleash the power of real-time translation, the language of instruction will become less important. Students will be able to listen to faculty and participate in class in whichever language they prefer – whether they are offshore, onshore, at home or on campus.

Glyn Davis, now head of the Department of Prime Minister and Cabinet, gave a speech earlier this year advocating Australian universities consider foreign language instruction.

Few in the sector responded to Professor Davis's ideas. The sooner Australian institutions start experimenting in this space, the better placed they'll be for the transformation to come from real-time multilingual streaming.

Beyond mode and language, the next major source of transformation will be price. Until now, the partners, business models and modes of instruction available to Australian institutions have not enabled them to enrol students offshore at local market rates.

Now, the scale of the opportunity in international education has attracted commercial providers to develop new models that support local market pricing.

Organisations such as Seek are delivering degrees in Latin America in local language at local price points, in partnership with established American institutions. Seek has announced initial partnerships with Australian universities targeting the India market and focused on business and technology disciplines. These moves are scratching the surface of what's possible across the next decade and beyond.

We see myriad opportunities for similar innovations in initial teacher education, healthcare professions and STEM education in places such as India, Indonesia, The Philippines, Vietnam and the Gulf states.

The great advantage of models that involve commercial partners, online delivery and/or third-party teaching is that the upfront capital investment is much less than that required to establish a branch campus. Branch campuses typically take 10 to 15 years before they start to generate a positive return on investment – well beyond the lifetime of an average vice-chancellor and their leadership team. An online or third-party teaching model can accumulate positive returns in three to five years.

These types of ventures are not just financial plays. Conceived strategically, they can expand an institution's brand, creating demand for onshore international education and research partnerships.

There are a range of other new models and innovators seeking to take advantage of the long-term potential of international education. Forward College, less than three years old, has grown to 2000 students in the European market by launching multi-city business degrees developed in partnership with top-tier providers such as the London School of Economics and King's College London. Cintana Education, founded by the former chief executive of Laureate Education, is targeting emerging markets with a top-200 ranked partner (Arizona State University) and providing services such as curriculum design, dual-degree programs and international exchange.

There are two common features to these innovations: a recognition of the long-term growth and value of international education; and a willingness to pioneer new ways to reach and serve these markets.

The implication for Australian universities is to operate a two-track strategy. They need to service the onshore market with integrity and zeal, targeting a sustainable share as the post-pandemic rebound progresses. At the same time, they need to experiment with new models and partners offshore. There is ample growth to come, but the first movers will capture the most attractive slices of it.

Justin Bokor is an independent adviser and former director of EY and Monash University. justin.a.bokor@gmail.com

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