

THE CAREER DISPATCH

April 2024 | Vol. 7





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TARUN GUPTA
Global Managing Partner



Given the region's vast population and the developing nature of its economies, South Asia presents an immense opportunity for higher education institutions. It is the second largest in terms of student enrolments and according to recent World Bank data accounts for 18% of all tertiary education students globally.

While the governments of these nations are involved in the development of primary education, the private sector dominates higher education. In India and Nepal, private education institutions, including universities, colleges, and stand-alone institutions, account for over 65% of higher education enrolment; in Bangladesh and Afghanistan, the share is over 40%; and in Pakistan and Sri Lanka, private HEIs cover 20% of all enrolment.

The top seven destination countries chosen by South Asian students are the USA, UK, Australia, Canada, New Zealand, Germany, and China, but new markets, such as Turkey and Ireland, are emerging as choices by students. The region has many opportunities, but it requires a dependable and knowledgeable local presence to manage agent, school, and university relationships to continually succeed in an increasingly competitive and ever-changing environment

The year 2023 emerged as a vibrant period for the global higher education sector, with recruitment levels surpassing those observed before the pandemic for many Higher Education Institutions (HEIs).

This edition of our newsletter shines a spotlight on the evolving landscape of immigration policies and the responses from

aspiring international students. Nations worldwide are reevaluating their immigration frameworks to accommodate this influx, balancing the need for educational opportunities with broader societal considerations.

We delve into how countries are adapting their policies to attract and retain talented individuals while ensuring the integrity of their immigration systems. Furthermore, we explore the perspectives and experiences of international students navigating these evolving policies. Their resilience and determination in pursuing their educational goals amidst changing regulations offer valuable insights into the global student experience.

We are dedicated to supporting and empowering international institutes looking forward to make inroads in the South Asian higher education market and leverage the outstanding potential of the region for recruiting students. Through our collaborations with our partner universities, we aim to provide enhanced resources, networking opportunities, and cultural exchange programs to enhance the prospect of our partners as well as enrich the academic journey of our diverse student community.

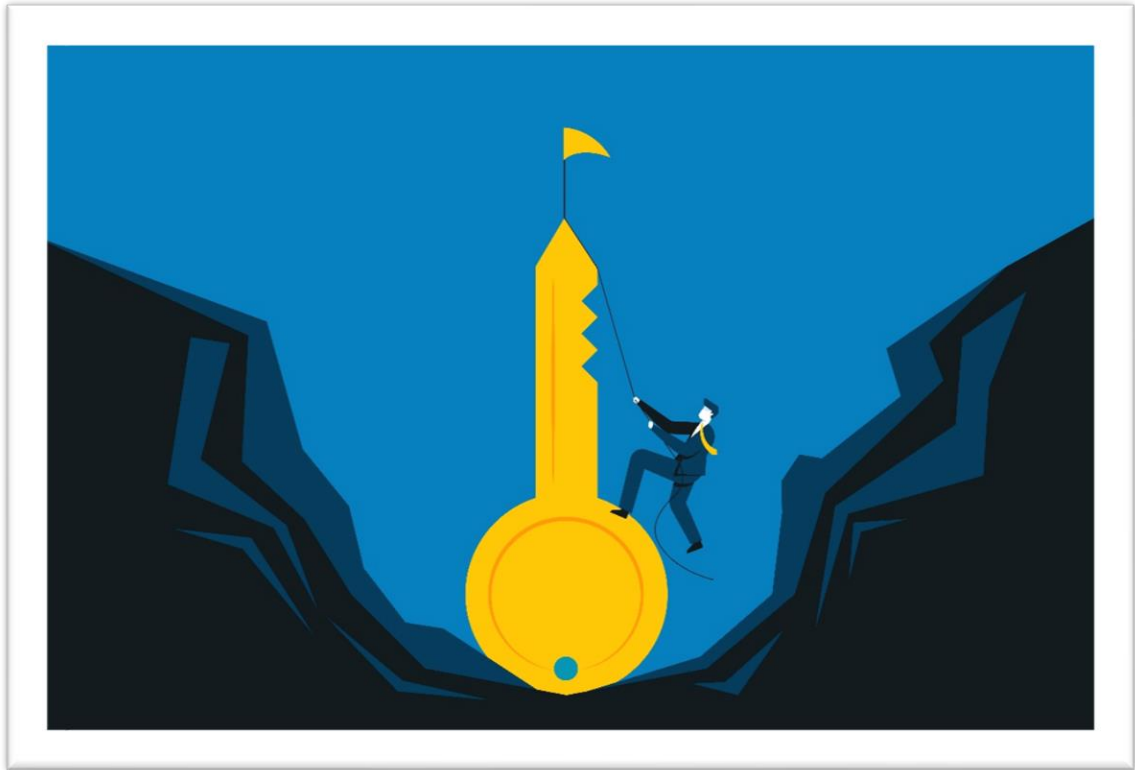
As we navigate these dynamic changes together, our commitment remains steadfast in providing support and guidance to our partners.

I hope you will enjoy this edition of *The Career Dispatch*.



SOUTH ASIA UNLOCKED

A primer for HEIs looking to enter the market



South Asia Unlocked is a special series by T&A Consulting, serving as a primer for new market entrants as well as existing Higher Education Institutes (HEIs) looking to leverage opportunities in the vast South Asian market.

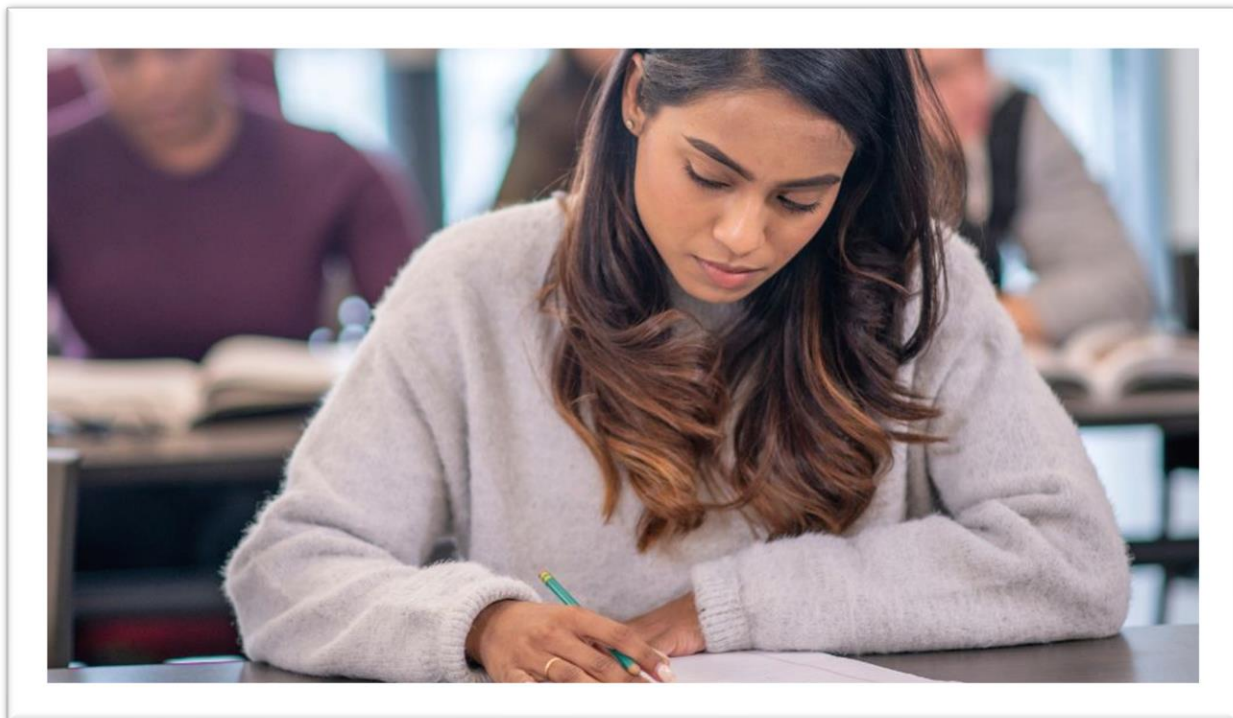
In the series, we discuss issues that are relevant to entry into the South Asian market—one of the most lucrative sources for international student recruitment that is undergoing massive changes in the sphere of higher education.

After discussing issues like **Visa frauds**, **housing crisis** woes for students abroad, and the dynamics of **labor shortages in OECD countries**, in this issue of *The Career Dispatch*, we explore **the changing immigration policies in the top preferred destination countries** and how that is impacting the choices made by students seeking international education.



WINDS OF CHANGE?

Strict visa rules in top destination countries



For outbound students from South Asia, the top destination countries have traditionally been the US, the UK, Canada, and Australia. According to the *Indian Students Mobility Report 2023*, which indicates entry numbers for 2022, the UK saw the highest year-on-year growth at 49.6% followed closely by Canada at 46.8%.

The US also had a significant growth of 18.9%. Australia saw relatively minimal growth of 0.7%. However, the recent updates to immigration policies in Canada, Australia, and the United Kingdom (UK) have sparked concern among students planning to study abroad.

These new rules, particularly regarding immigration fees, have especially caught the attention of those contemplating moving overseas for diverse purposes.

Did You Know?

Direct spending on study abroad by Indian students has been pegged at US\$47 billion for 2022. That figure includes tuition spending as well as housing and other living expenses, and it is projected to reach as high as US\$70 billion by 2025, based on current growth rates.



REASONS DRIVING CHANGES IN IMMIGRATION POLICIES

Immigration regulations have seen tightening in the recent years for different reasons in different countries

Canada



Canada has been the leading country attracting students from the South Asian region. According to ICEF, in December 2022, there were around 320,000 Indian students with active study permits in Canada, making up 39.5% of Canada's total foreign enrolment.

The Indian student market for Canadian institutions has grown by 46% since 2019. It has been the primary choice for Indian students in three out of the last four years, with the US securing the top spot in 2021.

However, changes have come about in the past few months that affect the entry of international students to the country.

Among its various measures, Canada has announced a temporary, two-year cap on the number of new study permits issued to international students as part of the measures to tighten integrity controls within Canada's student visa programme.

The cap will be in effect for 2024 and 2025, and it is anticipated that it will result in a 35% reduction in the number of new study permits issued in 2024, compared to 2023. Additionally, Canada's Immigration, Refugees, and Citizenship Canada (IRCC) department has doubled the amount required to be shown by students in their accounts assuring they can sustain themselves in Canada.

This amount has now been increased from \$10,000 to \$20,635, making the financial requirements steep. In 2023, diplomatic relations soured between India and Canada, leading to an adverse impact on the Indian students' perception of how attractive a destination Canada is.

According to the latest data from IRCC, the number of Indian student permit applications finalized by Canada in the last quarter of 2023 dipped by nearly 42% when compared to October-December 2022.



Australia



Indian students helped drive the recovery of Australia's international education sector in the post-pandemic world. In January-August 2023, the number of Indian students in Australia were up 34% compared with the same timeframe in 2022.

The **Australia-India Economic Cooperation and Trade Agreement** (ECTA) signed in December 2022 aims to boost students' mobility between the two countries, with Indian graduates of Australian institutions permitted to remain in Australia to work for up to four years.

However, the Australian Government, in a bid to **overhaul its 'broken' immigration system** within the next two years, has declared its intention to decrease the annual visa intake. By June 2025, Australia plans to reduce the annual intake to 250,000 visas.

The revised strategy includes stricter visa regulations for both international students and skilled workers. International students would now be required to **achieve higher scores on English exams**.

The students applying for a graduate visa will require a score of 6.5 points, up from 6.0, while student visa applicants will need a 6.0, up from 5.5.

Additionally, there would be **increased scrutiny on their subsequent visa applications**, potentially extending their time abroad.

The revisions to student visas primarily **target non-university institutions, some of which are colloquially referred to as 'ghost colleges'** due to their reputation for offering little actual education, instead relying on their students to work in low-wage positions. But this will also impact incoming students.

While there are assurances that the commitments made under the ECTA will remain in force and continue to apply to Indian students in Australia, the student community is wary of choosing Australia as their preferred destination.



United Kingdom



By June 2023, the UK issued slightly under 500,000 study visas, with Indian students making up approximately 30%. The nearly 143,000 visas granted to Indian students signified a 54% increase compared to the previous year. However, in May 2023, in a move to curb growing immigration, the UK government announced that international students would be prevented from bringing dependants with them as of January 2024, except those enrolled in postgraduate research programs.

According to the 2023 *Chartered Association of Business Schools (CABS) Annual Membership Survey*, this will impact nearly half the business schools in the UK, as 44% of the country's business schools are reporting that they will miss their non-EU recruitment targets this year.

As per the report, "It is anticipated that enrolments for MBA programmes will be most affected as MBA students tend to be older and often wish to bring their family with them."

Student preference changing as a response

Countries like Germany, Spain, France, Ireland, Dubai, Singapore, New Zealand, and Malta are becoming appealing options due to simplified visa procedures, greater access to information, and growing incomes. This trend is making international education more achievable for Indian students.

Indian students increasingly view Europe as an attractive option for education due to its combination of affordability and high-quality academic offerings. Furthermore, Europe's strong industrial base adds to its appeal as a promising educational destination for these students.

France is actively embracing Indian students, with a goal of hosting 30,000 by 2030. Likewise, Germany's affordable tuition fees and outstanding education system have led to an impressive 107% rise in Indian students over the last four years.

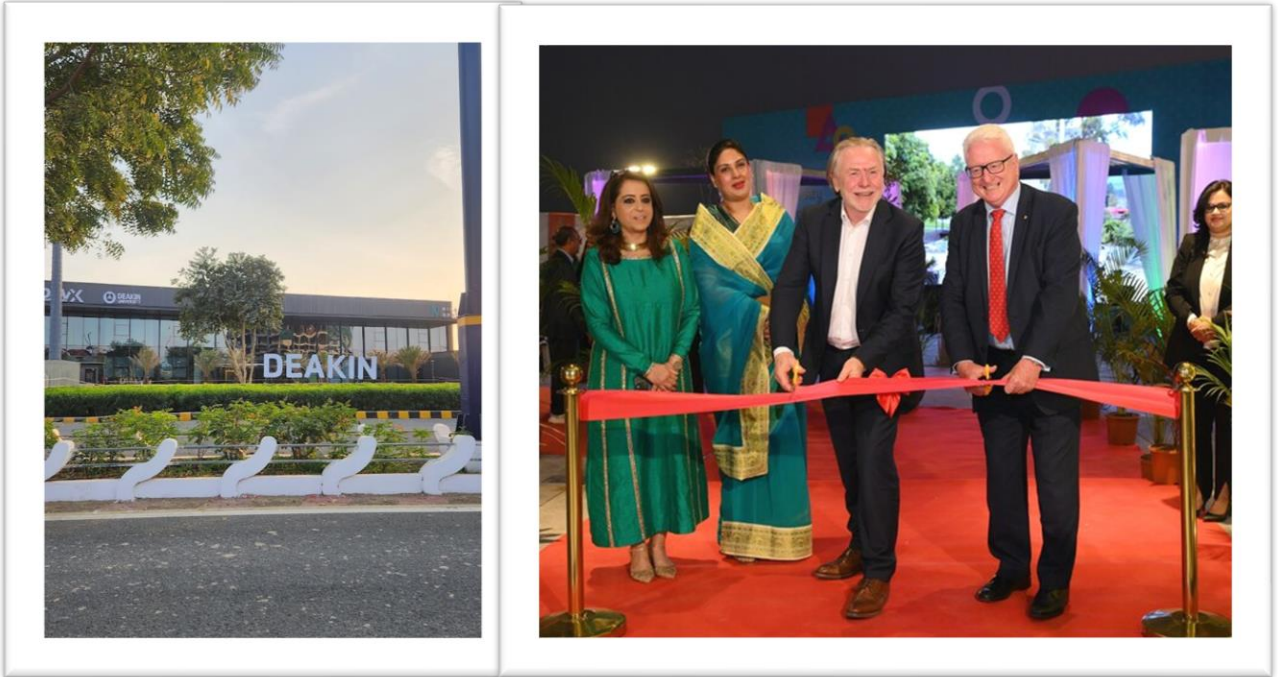
Within three years, Spain has seen a surge of around 12% in its international student population. Meanwhile, in Singapore, the number of Indian students has increased from 1,500 to 10,000 between July 2021 and March 2022.

Ireland's international student population has tripled from 2010 to 2020, hosting over 25,000 students in 2021. Malta's English language training sector is rebounding, with a 103% increase in enrolments over 2021.



COLLABORATION IN FOCUS

Australia unveils first foreign university in India



Deakin University, Australia, officially unveiled its India campus in GIFT City, Gandhinagar in January 2024, making it the first university in the world to open an international teaching campus in India. This initiative marks a significant milestone, showcasing the partnership and dedication shared between the Indian and Australian Governments alongside Deakin University.

Prior to the inauguration event, Indian Prime Minister Shri Narendra Modi engaged in discussions with the Deakin delegation, focusing on bolstering collaboration between governmental and academic entities, reflecting on Deakin's longstanding three-decade presence in India, and looking forward to the forthcoming campus opening ceremony.

The university initiated the admission process for its two postgraduate programs—cyber security (professional) and business analytics—which will commence in July 2024 at its GIFT City campus. The university is offering these programs at an annual tuition fee of AUD 19,000, which is roughly half the cost of studying at the university's Australian campuses.

Furthermore, another Australian university—University of Wollongong—also plans to launch its GIFT City campus in July 2024, and will target scholarships for women in fintech. This aims to empower women pursuing careers in fintech and establish strong connections with companies and alumni within GIFT City.



NEWS AND UPDATES

Australia releases Migration Strategy, tightens international student visa rules



In December 2023, Australia unveiled its Migration Strategy, ushering in alterations to student visas aimed at deterring non-genuine applicants. These reforms will impact the AUS\$30 billion-per-year international education sector. Changes involve reducing the post-study work visa by two years and reversing previously announced extensions, along with ending pandemic-era concessions like uncapped working hours.

This move addresses concerns about certain education providers, especially in the VET sector, aiding non-genuine students in entering Australia's job market through student visas. The new Genuine Student Test requires students to demonstrate that additional courses complement their degree. Despite these changes, Indian students remain eligible for longer post-study work visas due to provisions in the 2023 India-Australia free trade agreement.

IIT Guwahati signs MoUs with international universities

The Indian Institute of Technology, Guwahati has signed 4 MoUs with Dalhousie University, Canada, and Gifu University, Japan to enhance knowledge exchange. These partnerships were solidified during the 3-day event, the 'Japan-NER Bioeconomic Technology Cooperation Symposium 2024' (JNBTCs-2024), being hosted by IIT Guwahati from 3 – 5 March 2024.

UGC to penalise EdTech companies offering unapproved online foreign courses

India's University Grants Commission (UGC) is to take action against EdTech companies offering foreign degree and diploma courses online without approval. In a public notice issued in December 2023, it mandated that no foreign higher educational institution shall offer any programme in India without the prior approval of the commission.

Taiwan introduces special scholarship for South Asian students

Taiwan has introduced a specialized scholarship program targeting students from South Asian countries. Known as the MOE Taiwan Scholarship Programme, this initiative offers undergraduate and postgraduate opportunities for aspiring scholars from nations including India, Bhutan, Bangladesh, Sri Lanka, Nepal and the Maldives. Eligible students to receive financial assistance ranging from 40,000-20,000 New Taiwanese Dollars.



Malaysia's Lincoln University College to set up campus in India



Malaysia's Lincoln University College has become the first foreign university to apply through the University Grants Commission's (UGC) dedicated application portal to set up a campus in India.

Lincoln University College is ranked in the 301-340th in the QS World University Rankings by Subject 2023.

The university is also placed in the 301-400th band in the Times Higher Education World Rankings.



Bangladesh's CSU and Australia's DIU enter MoU

In a step towards fostering international academic collaboration, Charles Sturt University of New South Wales, Australia, and Daffodil International University of Bangladesh have inked an MoU, as part of which students from both universities will have the opportunity to engage in reciprocal visits, fostering cultural exchange and enriching academic experiences.



DU most sustainable institute in India: QS Rankings 2024

The University of Delhi (DU) has been featured as the most sustainable Indian institute in the QS World University Rankings: Sustainability 2024 released on December 5, 2023. Globally, the university has ranked at 220.

University of Toronto grabbed the top spot, followed by University of California, Berkeley and The University of Manchester, in the QS World University Ranking: Sustainability 2024 list.



Kerala plans to open up for foreign universities

The Indian state of Kerala is now welcoming foreign universities to establish a presence in the state as announced by the Finance Minister K.N. Balagopal, during his Budget 2024 speech. The move is seen as an attempt to attract foreign investment in higher education while encouraging the state's youth to pursue higher studies in Kerala. Around 1.32 million Indian students went abroad in 2022, of which 4% were from Kerala.

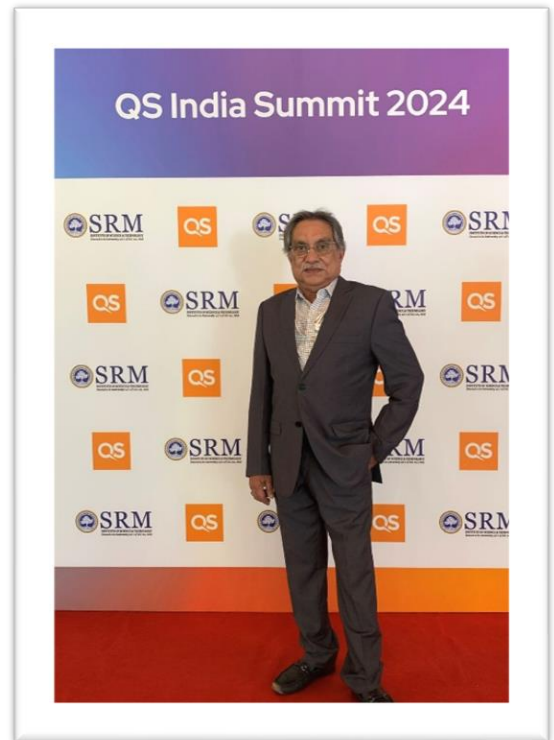


T&A EVENTS AND INITIATIVES

T&A Consulting at QS India Summit 2024: Empowering Excellence in Higher Education

T&A Consulting, representing Queen's University Belfast South Asia, participated in the QS Quacquarelli Symonds India Summit 2024 February 2024 in Mamallapuram, Chennai.

Held under the patronage of the Ministry of Education, Government of India, the summit was themed "Empowering Excellence: Unleashing the Potential of Partnerships and Collaboration in Indian Higher Education". It saw academic leaders from USA, UK, Europe, APAC, and the Middle East, and distinguished voices from QS, universities, governments, and industry, all sharing expert insights and perspectives on the theme of 'Building universities for a knowledge economy'.



T&A's Ashwin Merchant, Senior Advisor - Partnerships/Institutions, engaged with various senior representatives from higher education institutions to discuss strategies for fostering meaningful partnerships. This marked another significant milestone in T&A's dedication to fostering partnerships and facilitating initiatives for foreign higher education institutions looking to enter the diverse and complex South Asian market.





T&A welcomes Team Queen's University Belfast to India



T&A Consulting, South Asia office for Queen's University Belfast (QUB), hosted Heather Taylor - Head of International Markets, and Roisin McEvoy - Acting Director of Global Marketing, Recruitment, and Admissions in India in January 2024.

The visit was an enriching experience that exhibited various opportunities, that QUB has to offer to students in India. There were a series of events, including school fairs, agent meetings, and offer holder sessions, facilitated by the South Asia team. These interactions provided a valuable platform for promoting the university's programs and engaging with prospective students.

Furthermore, the visit to the India office enabled insightful discussions and collaboration with the team with a key focus on building new strategies to enhance the university's presence in the region.



Team Talent Boost successfully executes a Multi-Stakeholder workshop on Bridging Talent: Building Indo-Finnish Frontiers



T&A's Talent Boost team successfully executed the Multi-Stakeholder Workshop on **Bridging Talent: Building Indo-Finnish** Frontiers. This collaborative effort, held on March 14, 2024, by Business Finland and the Embassy of Finland, aimed to ignite dialogue and foster collaboration between key players in India and Finland.

The esteemed Ambassador of Finland to India, His Excellency Mr. Kimmo Lähdevirta, opened the event with insightful remarks, followed by Ms. Gitta Perez, Director & Regional Head of Business Finland, delivering the keynote address.

Furthermore, an engaging panel discussion delved into the topic of Enhancing Indo-Finnish Collaboration in Talent Acquisition and Entrepreneurship, exploring potential avenues for strengthening this crucial partnership.

The Business Finland team further enriched the event by presenting their innovative initiatives – the Global Growth Function and Invest in Finland. Ms. Shreshta Sharma, Talent Manager India at Business Finland, concluded the workshop by highlighting the impactful Talent Boost program in India.

In the lead-up to the event, T&A's Talent Boost team played a multifaceted role. We proactively reached out to universities, startups, and alumni networks, fostering valuable connections. Furthermore, we acted as the event emcee, ensuring a smooth flow and engaging the audience throughout the program. This, combined with comprehensive branding support, contributed to a well-rounded event experience.

The workshop achieved remarkable success, fostering productive discussions, and establishing strong connections that will serve as a foundation for future collaboration.



Queen's University Belfast: South Asia team empowers 1,200+ students with counseling; Practical learning by QUB faculties; New collaboration with OP Jindal University



The South Asia team at Queen's University Belfast has been actively working to promote the university and its undergraduate and postgraduate courses in South Asia. From January – March 2024, the team organized 120 activities across various destinations in South Asia, which included career counselling at UG and PG level, Indian Higher education institutional visits with regards to collaborations, guest lectures in universities and project-based learning workshops for students.

A total of more than 1,200+ students participated in these events, which were designed to give them a better understanding of the opportunities available to them at Queen's University Belfast.

In addition, we had an exciting new collaboration with the top ranked private university in India, **OP Jindal Global University**, for their students to join QUB at undergraduate and postgraduate levels.

The month of February ended with a journey to multiple private and state universities in India, Explore, learn and collaborate was our main moto for visiting these universities, The School of Pharmacy and The School of Law accompanied by our South Asia team had an amazing month delivering lectures and interacting with curious students.

Overall, the South Asia team has been successful in promoting Queen's University Belfast and its courses in the region. Through their efforts, they have been able to reach many potential students and provide them with valuable information about the opportunities available at the university.

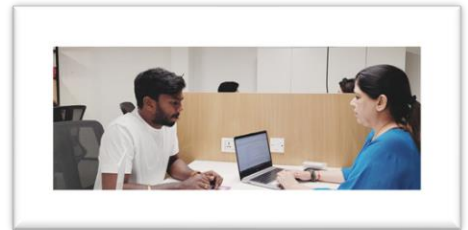


University of Derby: Counseling of more than 300 students

During the previous quarter, the University of Derby dedicated substantial efforts to lead generation, counseling, participation in agent events and fairs, counselor and agent partner training, and conversion activities. It has been a bustling period, with much time spent on the road engaging with students and parents, addressing their inquiries, and aiding them in making well-informed decisions.

These events have proven to be invaluable platforms for providing counseling and guidance to individuals seeking higher education opportunities. Across various cities, including Delhi, Mumbai, Pune, Kolkata, Kochi, Coimbatore, Chennai, Bangalore, Indore, Kandy, Colombo in Sri Lanka, and Nepal, we have had the privilege of counseling more than 300 students.

Simultaneously, the University has placed a strong emphasis on outreach initiatives targeting schools and colleges, as well as exploring potential partnerships for Transnational Education (TNE) with other educational institutions. These efforts reflect our commitment to expanding access to education and fostering international collaborations for the benefit of students worldwide.





ABOUT T&A CONSULTING

India and South Asia Education Representation Services



Established in 2006 in India, T&A Consulting is a strategic advisory and consulting firm that specializes in providing services to foreign economic development organizations, academic institutions, tourism authorities and private businesses worldwide.

Our capability is built on our expertise and the ability to leverage the extensive sector knowledge of our team of professionals to ensure that we deliver beyond the expectations of our clients. We take enormous pride from our high level of long-term client retention.

As well as our Global HQ team in Gurugram near New Delhi, we have offices in Canada for the Americas and representatives in Belfast and Dubai for clients focused on the UK, European and Middle East markets.

For entry into South Asia only, T&A Consulting has advised multiple foreign governments and their Higher Education Institutions (HEIs) on the opportunities for growth arising from student mobility and, more latterly, partnerships, especially in India, following the introduction of the New Education Policy.

We represent a number of universities, overseeing and managing their relationships with agents and schools, attending multiple recruitment events and offering ongoing guidance to their international teams and academics on government policy, course design and emerging higher education trends.

As we continue to expand our international network and expertise, T&A's position as a respected strategic advisory and consulting firm has enabled us to continue our original guiding principle for success – **WE GO BEYOND** – our clients' expectations.



HOW CAN WE HELP?



- Act as an on-ground local representative, promoting international universities and create their brand visibility in India.
- Develop targeted marketing strategies and promotional campaigns to create awareness about the represented universities.
- Conduct comprehensive market research and analysis to identify target regions and institutions in India.
- Present Industry insights via country reports and industry deep-dives.
- Assist students in the application process and provide counselling to help them make informed decisions.
- Provide pre-departure support and orientation for offer holders on behalf of represented universities.
- Liaise with universities to streamline the admissions process for the Indian students.
- Build and maintain strong relationships with Indian educational institutions and stakeholders.
- Keep represented universities updated on market trends, competitor insights, and changes in Indian education policies.

Get in touch with our University Engagement Manager

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