Research Office
Legislative Council Secretariat

Fact Sheet

# International education hubs in the United Kingdom and Australia

FS03/2025

## 1. Introduction

1.1 In Hong Kong, the number of non-local students enrolled in the University Grants Committee ("UGC") funded programmes has surged by 59.2% within a decade to reach a record high of 23 097 in 2023-2024, accounting for 22% of total enrolments.[1] As most of these non-local students pay full tuition fees, coupled with their spending on accommodation and daily living expense, they are making contribution to the local economy.[2] Moreover, non-local students can become an additional manpower supply if they stay and work after graduation, alleviating the chronic problem of labour shortage due to population ageing. Coupled with the intangible benefits (e.g. enriched cultural diversity and cosmopolitan status) and strong competitiveness of local universities (e.g. five local universities ranking amongst the Top 100 universities in the world), there is persistent advocacy to promote Hong Kong as an international education hub ("IEH") and the brand of "Study in Hong Kong". Reflecting this, the Legislative Council passed a motion at its meeting held on 17 January 2024, calling for "actively building Hong Kong into an IEH".[3]

1.2 At the request of the Subcommittee on Promoting the Development of Hong Kong into an International Education Hub, the Research Office has studied the measures adopted in the UK and Australia to promote their status as IEHs. In 2021, the UK and Australia were the second and third most popular destinations for international students respectively, just next to the US.[4] Both governments have adopted proactive policies to attract international students. Taking the UK as an illustration, it has strategically expanded its market reach through the Transnational Education ("TNE") programmes and

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[1] Total enrolment includes students in the sub-degree, undergraduate and postgraduate programmes. See University Grants Committee (2025).

[2] Overall education services (for both local and non-local students) took up 1.3% of Gross Domestic Product ("GDP") in Hong Kong in 2022, but this was much lower than that of 5.2% in the United States ("US"), 6.0% in the United Kingdom ("UK") and 4.7% in Australia.

[3] Legislative Council (2024a).

[4] UNESCO Institute for Statistics (2025).

launched promotion campaigns in priority countries.[5] For Australia, it released a 10-year strategy in 2021, aiming to become a global education leader through future-focused planning and global engagement. This ***Fact Sheet*** begins with an overview of the global trends of IEHs, followed by a discussion of recent development in Hong Kong. It will then study the measures promoting IEH in the UK and Australia, along with a summary table for easy reference (**Appendix**).

## 2. Recent global developments

2.1 The development of international education ("IE") is driven by both demand and supply factors. On the **demand** side, students pursuing overseas study can access to high-quality education and specialized skills not available in their home countries. Moreover, not only can overseas study widen the career opportunities in a globally interconnected labour market, it also offers migration pathways for the students concerned. On the **supply** side, many advanced countries have capitalized on their well-established education infrastructure and prestigious universities to become IEHs.[6] The full tuition fees paid by international students generate significant revenue to cross-subsidize tuition fees of local students and fund research activities.[7] Furthermore, overseas graduates constitute a potential pool of skilled talents which is vital for development of knowledge-based economies nowadays.

2.2 The number of overseas students worldwide has surged by 60% in ten years to 6.4 million in 2021, and is projected to rise further by 25%-40% to hit 8-9 million by 2030.[8] According to the most recent survey conducted by the United Nations, the US is the most popular destination for overseas students, with a global share of 12.9% in 2021 (**Figure 1**). This was followed by the UK(9.3%), Australia (5.9%), Germany (5.8%) and Canada (4.9%).[9]

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5 TNE encompasses learning through overseas branch campuses, online programmes, and blended learning activities combining online and face-to-face course delivery.

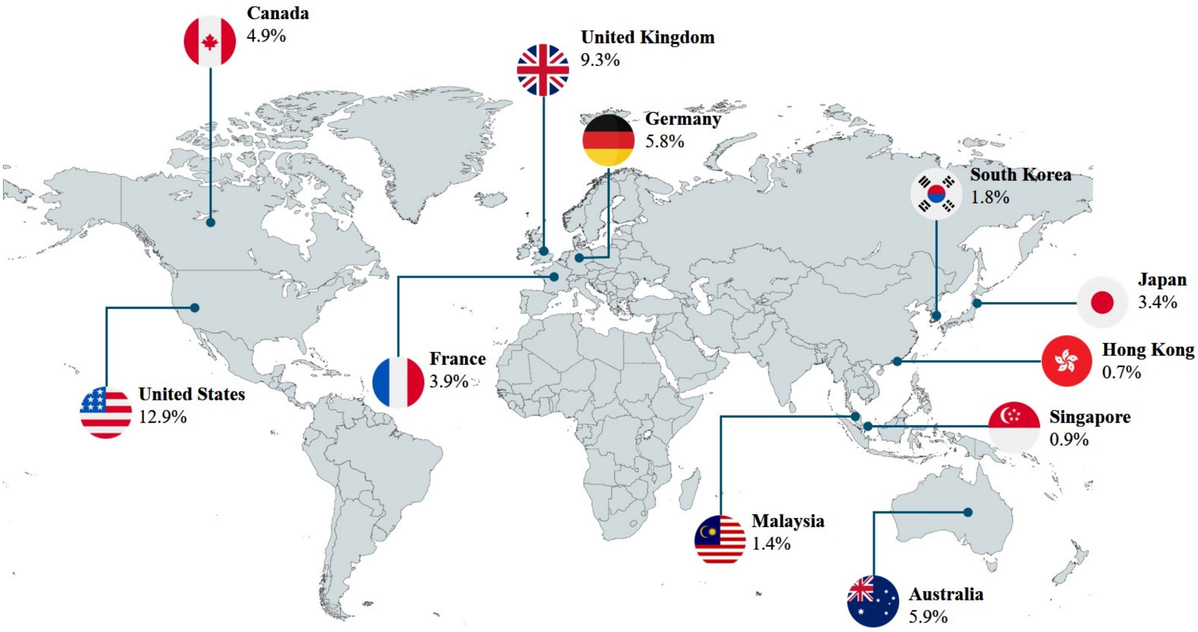
6 For instance, the US has 38 universities ranked among the world's Top 100, while the UK has 12. Notably, the UK's University of Oxford has maintained its position as the world's number one university for nine consecutive years.

7 It is estimated that overseas students spent a total of US$196 billion (HK$1,529 billion) in 2019 on tuition, accommodation, food, retail, insurance and transport across the globe. The amount is projected to hit US$433 billion (HK$3.4 trillion) by 2030. See ICEF Monitor (2022).

8 Ibid.

9 UNESCO Institute for Statistics (2025).

## Figure 1 – Global distribution of international students (2021)[(1)]




Note: (1) Latest available figures from the United Nations Educational, Scientific and Cultural Organization ("UNESCO") as the US has not submitted enrolment figure to the organization since 2022.
Source: UNESCO Institute for Statistics (2025).

2.3 In short, measures taken by the aforementioned "Big Five" countries to promote IEHs are summarized as follows:

(a) **Dedicated national strategy to promote IE**: Most of them (except the US) have launched the national strategies to set out the objectives, leadership, directions and action plans for IE development. Taking Germany as an example, it has just published an updated 10-year national strategy on IE in June 2024, with an improved regulatory framework for overseas students. Key initiatives include (i) expedited visa and residence permit procedures; and (ii) standardized recognition of university degrees and academic qualifications from abroad;

(b) **Pathways for graduates to become residents**: The US, the UK and Germany adopt an "open-door" policy without imposition of ceiling onto overseas students. However, Canada and Australia recently introduced a regulatory cap on international student enrolments for 2024 and 2025 respectively, in the face of emerging local pressure against influx of migrants and overseas students;

It is possible for overseas students to become permanent residents after graduation in the "Big Five" countries. Typically, the graduates need to secure a post-study work visa for relevant experience and then apply for permanent residency through skilled migration visas or employer sponsorship. More specifically for Canada, it offers a more streamlined pathway to migration by permitting visa applicants to have "dual intent", allowing overseas students to apply simultaneously for a study permit and permanent residency;

(c) **In-study work opportunities**: Overseas students are allowed to work off-campus to enrich their understanding of the culture of their host communities. While most major destination countries allow overseas students to work part-time off-campus and full-time during breaks or holidays, the US permits off-campus employment only under specific conditions related to their field of study; and

(d) **Education branding to differentiate from competitors**: The UK and Canada promote their IE through "Study UK" and "EduCanada" respectively, while the US operates the "EducationUSA" network with over 430 student advising centres across more than 175 countries and territories.

2.4 ***However, IEH development is advertently affected by the changing social attitude towards immigrants and inflows of foreigners of the host countries***. More specifically, there are strong allegations that IEH development would **(a)** crowd out the opportunities of local residents to receive higher education, especially so when overseas students are charged higher tuition fees than local students; **(b)** reduce the number of jobs available to local residents; and **(c)** create adverse impacts on local housing, public transport and medical services.[10] After the COVID-19 pandemic, it is noted that many governments have tightened student visa policies in face of stronger opposition against immigrants from local residents during 2022-2024. For instance, Canada introduced a new cap of 485 000 on the number of study permits issued for 2024.

[10] Taking the UK as an example, there are frequent media reports that many universities favour full fee-paying international students over domestic applicants, particularly at the highest-ranking universities. For Singapore, when it embarked on its IEH journey (i.e. Global Schoolhouse project) in 2002, it encountered strong concerns from local residents about increased competition from international students for local school places. The project aimed to attract 150 000 international students, but was forced to closure by 2010s due to insufficient student enrolments. See House of Commons Library (2024c), Lo (2014), Mok (2017), and Lewis (2024).

The cap was adjusted to 437 000 for 2025, representing a 36% decrease from the number of the study permit granted in 2023. The Australian government announced in August 2024 to set a maximum number of 270 000 new overseas students for 2025, down 26% from 364 000 in 2023 and close to the pre-pandemic level of 274 000 in 2019.[11] For the UK, it prohibited international students from bringing dependants to the UK during their studies in May 2023.

## 3. Recent developments in Hong Kong

3.1 In the 2005 Policy Address, the Government announced its intention to make Hong Kong a regional education hub by further opening higher education services to non-local students.[12] In the 2023 Policy Address, this ambition broadened from a regional hub to a global hub for education services. This vision was initially propelled by three policy measures. ***First***, the quota for non-local students in UGC-funded universities had increased progressively from 4% in 2004-2005 to 10% in 2005-2006 and further to 20% in 2008-2009. ***Secondly***, the Immigration Arrangements for Non-local Graduates ("IANG") was launched in May 2008, allowing non-local students to seek employment in Hong Kong after graduation. By end-2023, altogether 141 925 non-local graduates have stayed in Hong Kong after graduation through IANG. ***Thirdly***, four local universities have set up their branch campuses in the Guangdong-Hong Kong-Macao Greater Bay Area ("GBA") since 2005, leveraging the synergies between the complementary academic structures and facilities of campuses across the border.[13] A notable example of these cross-border educational initiatives is the 2+2 degree programme co-offered by CUHK and its branch campus in Shenzhen, enabling students to study two years at each campus for greater academic exposure.

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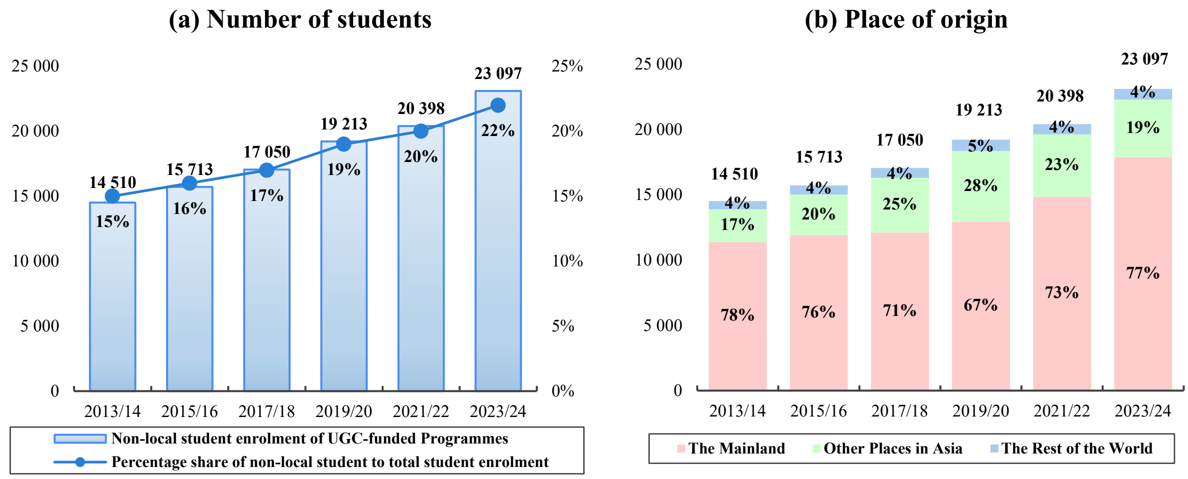
11 Likewise, the Netherlands proposed a bill in May 2024 to cap the number of students admitted to an associate or Bachelor's degree programme in order to better manage the inflows of international students. See Government of the Netherlands (2024).

12 This aligned with the vision set out in the 2004 Policy Address of "promoting Hong Kong as Asia's world city, on par with the role that New York plays in North America and London in Europe." See Lai & Maclean (2011) and Lo & Li (2023).

13 They included (a) Hong Kong Baptist University in Zhuhai (established in 2005), (b) Chinese University of Hong Kong ("CUHK") in Shenzhen (2012); (c) Hong Kong University of Science and Technology in Guangzhou (2022); and (d) City University of Hong Kong in Dongguan (2024).

3.2 Over the past ten years, the number of enrolment of non-local students in UGC-funded programmes has surged by 59.2% in ten years to reach an all-time high of 23 097 in 2023-2024 (**Figure 2**). Likewise, the proportion of non-local students has leaped from 15% to 22% over the past decade. Analysed by source, most of the non-local students came from the Mainland, accounting for 77% of the total in 2023-2024. This was followed by other places in Asia (with a combined share of 19%) and the rest of the world (4%).

**Figure 2 – Profile of non-local students in UGC-funded programmes**




Source: University Grants Committee (2025).

3.3 Most recently since 2022, the Government has launched several new facilitation measures to further develop Hong Kong as an IEH, including:

(a) **Doubling the quota for non-local students to 40%**: As from 2024-2025, the quota for the proportion of non-local students of UGC-funded institutions has increased further from 20% to 40%. Moreover, the Government has injected an additional HK$1 billion into the Government Scholarship Fund to increase the quota of the Belt and Road Scholarship by 50% to 150 from 2024-2025. Furthermore, the Government has earmarked over 80 hectares of land in the Northern Metropolis for the development of a University Town;[14]

[14] The University Town will host a cluster of top local and global education institutions to foster synergies in attracting international students and overseas academic and research talents to Hong Kong.

(b) **Strengthening promotion activities outside Hong Kong**: UGC has allocated HK$20.5 million during the 2022-2025 triennium for organizing and participating in overseas publicity and promotional activities to recruit international students;[15]

(c) **Relaxing the immigration and part-time work arrangements**: In the 2022 Policy Address, while the limit of stay under IANG was relaxed from one year to two years, its coverage was widened to include graduates from the GBA campuses of Hong Kong universities. In November 2023, non-local students studying full-time postgraduate programmes in Hong Kong were allowed to take up part-time employment. This arrangement was then extended to non-local undergraduate students in the 2024 Policy Address;

(d) **Improving student hostel facilities**: The Hostel Development Fund was established in July 2018 to expedite development of 15 university student hostels, with an initial injection of HK$10.3 billion.[16] In addition, the Government will launch a pilot scheme in the first half of 2025 to streamline the processing of applications in relation to planning, lands and building plans, so as to encourage the market to convert hotels and other commercial buildings into student hostels on a self-financing and privately-funded basis; and

(e) **Attracting non-local vocational and professional education and training ("VPET") students**: Starting from 2024-2025, eligible non-local VPET students may remain in Hong Kong for one year after graduation to pursue employment relevant to their study fields under the pilot Vocational Professionals Admission Scheme.

3.4 However, there are a number of public concerns and challenges over further development of Hong Kong as an IEH. ***First of all***, it is felt that the mix of non-local students is not diversified and cosmopolitan enough. For instance, 77% of non-local students came from the Mainland in 2023-2024.[17] ***Secondly***, there were a total of 64 244 non-local students in 2023-2024, but only around 37 600 beds were available in university student hostels as at September 2023.

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15 Established jointly by the eight UGC-funded universities, the Heads of Universities Committee's Standing Committee on Internationalisation has developed the "Study in Hong Kong" brand to attract more non-local students to pursue their studies in Hong Kong.

16 GovHK (2024b).

17 Legislative Council (2024b).

According to a property agency, the shortage of university hostel places would amount to the region of 120 000 places by 2028.[18] With the shortfall in student hostels, there are concerns over the knock-on effect on the market rentals as non-local students will switch to private housing for accommodations. ***Thirdly***, recent reports of fraudulent and fabrication of academic qualifications by non-local students could undermine the reputation of Hong Kong as an IEH.[19] ***Fourthly***, the brand of "Study in Hong Kong" seems to have low global visibility, requiring more publicity campaigns.[20] ***Fifthly***, some 92 000 talents have been approved to come to Hong Kong under the Top Talents Pass Scheme ("TTPS") as at end-2024.[21] Their children enjoy the rights to basic education and might intensify the competition for university places. As such, the Government will review the definition of "local students" in tertiary institutions' admission process to ensure fair allocation of higher education opportunities.[22]

## 4. Recent developments in the United Kingdom

4.1 The UK is a global leader in higher education, with 12 of its universities ranked among the Top 100 in the world (including three in the Top 10).[23] Moreover, it hosted approximately 759 000 overseas students in 2022-2023, capturing the second-largest share of the global international students, just after the US.[24] To a certain extent, this achievement could be attributable to the Prime Minister's Initiative ("PMI") launched by Prime Minister Tony Blair's Labour government in 1999. PMI, which ran from 1999 to 2005, marked the first coordinated approach to IE, followed by PMI2 (2006-2011) and the 2013 International Education Strategy ("IES").[25]

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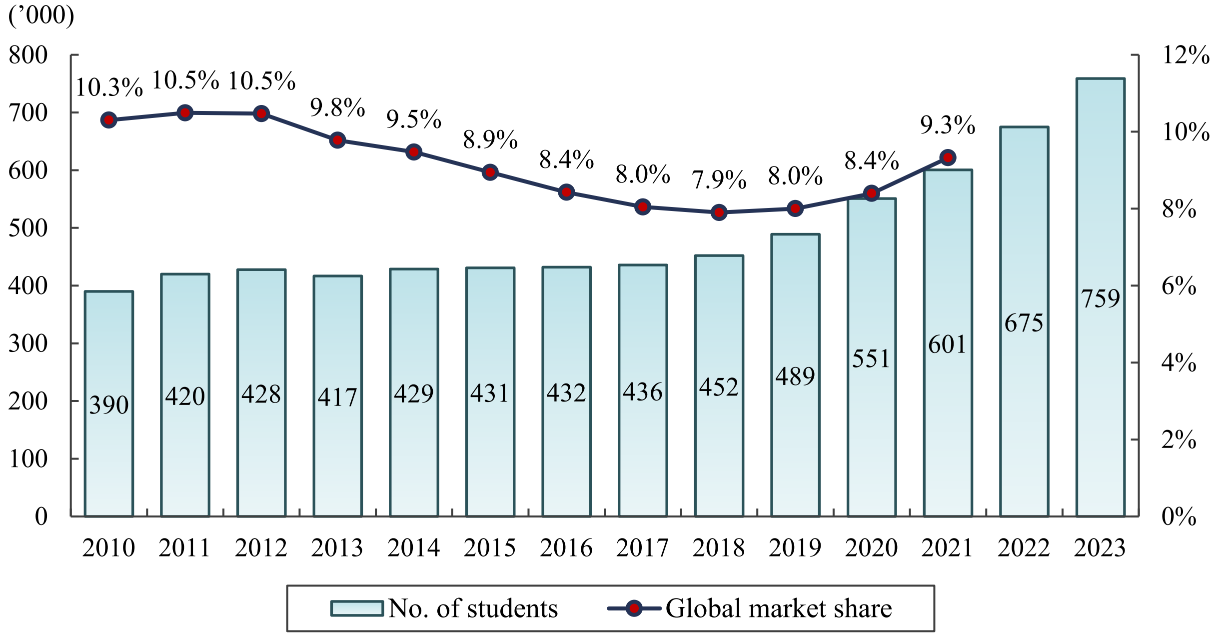
18 Colliers (2024).
19 Wu (2024).
20 Our Hong Kong Foundation (2023) and Legislative Council (2024b).
21 GovHK (2025).
22 星島日報(2025).
23 These are University of Oxford (ranked 1st), University of Cambridge (5th), Imperial College London (9th), University College London (22nd), University of Edinburgh (29th), King's College London (36th), London School of Economics and Political Science (50th), University of Manchester (53rd), University of Bristol (78th), University of Glasgow (87th), University of Birmingham (93rd) and University of Sheffield (98th). See Times Higher Education (2025).
24 The UK has consistently maintained this second-place position except in 2019 when it was temporary overtaken by Australia. See House of Commons Library (2024c).
25 PMI developed the "Education UK" brand as an umbrella identity for promoting its IE services and targeted to attract 50 000 additional international students within six years. PMI2 shifted its focus from recruitment to enhancing international student experiences, creating partnerships and increasing TNE. The 2013 IES positioned IE as an "export category" and sought to increase the income resulting from exports of education services.

4.2 However, the UK position in the global IE market weakened somewhat after it had tightened immigration requirements for international students (i.e. the closure of the post-study work route) in April 2012.[26] As such, the global share of the UK in the IE market fell from a peak of 10.5% in 2012 to 7.9% in 2018 (**Figure 3**). To revive its market competitiveness, Prime Minister Theresa May of the Conservative government launched a new IES in March 2019 with two ambitious policy targets for 2030: (a) increase the number of international students to 600 000 per year; and (b) raise annual IE revenues to £35 billion (HK$349 billion). These targets represented increases of 33% and 46% respectively from 2018 levels. The 2019 IES was updated in February 2021, keeping the above targets and outlining supportive measures after the pandemic.

**Figure 3 – UK's share of global international higher education students, 2010-2023(1)**




Note: (1) Latest available global market share from UNESCO.
Sources: Higher Education Statistics Agency (2024) and UNESCO Institute for Statistics (2025).

[26] Earlier on, the Tier 1 (Post-study Work) visa was introduced in 2008 allowing international students graduating from UK universities to stay in the UK for up to two years after they finished their course, with unrestricted access to the labour market. This post-study work visa attracted a large number of applications, with the grants of extension of stay increasing from 20 015 in 2008 to 43 719 in 2011. See House of Commons (2016).

4.3 The major policy measures taken by the UK to promote IEH are briefly summarized below:

(a) **Work opportunities while studying and after graduation**: In 2006, the UK government introduced a points-based student visa system, allowing overseas students to work part-time during the term and full-time during holidays. Overseas students also had an option to stay to work after graduation. At present, overseas full-time students at degree level are allowed to work a maximum of 20 hours per week during term time and full-time during vacation periods.

In July 2021, the UK government introduced a new post-study work visa, the Graduate visa, allowing international graduates of either undergraduate or master's degree to apply to stay in the UK for up to two years after their studies. PhD graduates can apply to stay longer, for up to three years;

(b) **New and competitive education offerings**: The UK government has promoted alternative education offerings for students to pursue UK qualifications in their home countries without going to the UK. New delivery models include (i) branch campuses; (ii) online learning; and (iii) collaborative arrangements with overseas institutions like dual degree programmes. These are also instrumental in fostering mutual recognition of qualifications and brokering partnerships between the UK and partner countries to co-develop industry-aligned degree programmes that enhance graduate employability;

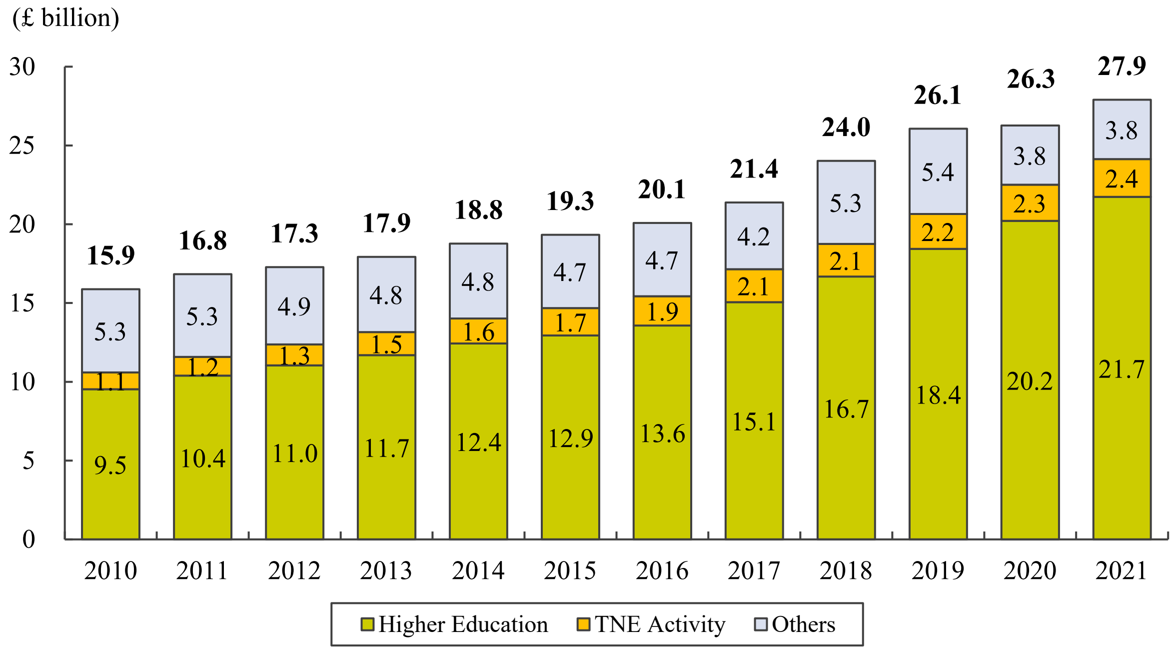
(c) **Launching global promotional campaigns**: The British Council launched the "Study UK" campaign in 2016 to promote the UK as the first-choice study destination to international students.[27] To strengthen the campaign, the government appointed its first International Education Champion in June 2020 tasked with increasing education exports, diversifying the international student recruitment base, and addressing market access barriers in priority markets, including the mutual recognition of online and blended learning provisions; and

[27] In short, "Study UK" engages prospective students through multiple channels, including (a) a comprehensive website providing information on all aspects of UK study; (b) social media presence across platforms like Instagram and Facebook; and (c) a monthly e-newsletter updating students about educational opportunities.

(d) **Internationalization of the Technical and Vocational Education and Training ("TVET")**: The 2019 IES identified TVET as the UK's lesser-known strengths worthy of further development. Following the launch of IES, the Department for International Trade has been actively leveraging its government-to-government and government-to-industry networks to promote the UK's TVET expertise internationally through organizing workshops, webinars and roadshows for overseas ministerial delegations and government officials, as well as the creation of informative video clips to showcase the UK's TVET offerings to global stakeholders.

4.4 On **policy effectiveness**, the number of international students has stayed on an uptrend after the launch of the first IES in 2013. In 2023, there were about 759 000 international students studying at UK universities, marking the 10th consecutive years of record high (**Figure 3 above**). The influx of international students and the expansion of TNE have contributed to an upsurge in education export revenue, which increased by 75% during 2010-2021 to £27.9 billion (HK$278.2 billion) (**Figure 4**). Specifically, revenue from higher education and TNE activity more than doubled to £21.7 billion (HK$216.3 billion) and £2.4 billion (HK$23.9 billion) respectively over the period.

**Figure 4 – Education export revenue in the United Kingdom, 2010-2021**




Source: GOV.UK (2024a).

4.5 However, the UK encountered a new problem of influx of dependents accompanying international students, with the number of dependant visas granted rising 750% to hit 136 000 during 2019-2022. These dependants, predominantly from India and Nigeria (accounting for 73% of the total in 2022), placed considerable pressures on the UK's public services and raised concerns among local residents.[28] In response to public concerns, the UK government tightened the visa policy in May 2023, disallowing international students to bring their dependants to the UK during their studies. This restriction came into effect in January 2024, with exemption granted to students enrolled in postgraduate research programmes (i.e. PhD candidates and research-led master's degrees).

4.6 As a side effect, the influx of international students has led to shortage of student housing in the UK, with rents for university-owned accommodations and private housing rising by 12% and 13% respectively during 2021-2024. Reportedly, total demand for student housing accommodation is projected to grow by 39% in five years to reach 2.2 million beds by 2026, resulting in a huge shortfall of 620 000 beds.[29] These have precipitated urgent calls to expand housing solutions to accommodate the growing student population.

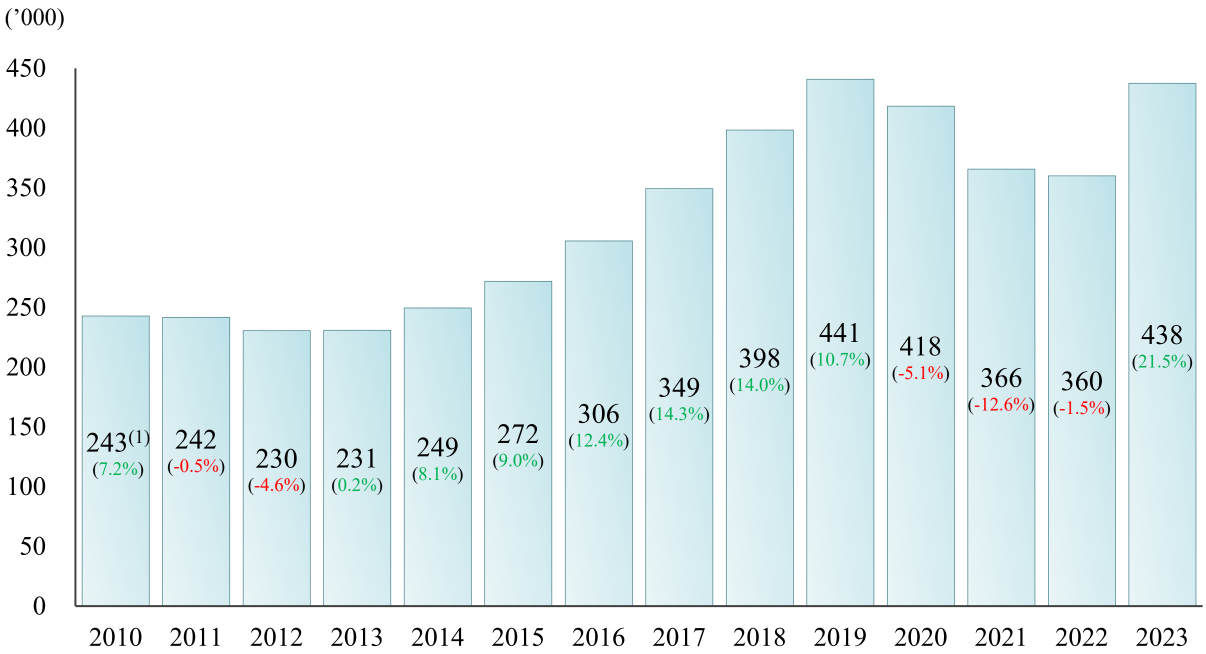
## 5. Recent developments in Australia

5.1 Despite its relatively small population of just 27 million, Australia has a high concentration of renowned universities, with six ranked amongst the Top 100 in the world.[30] The Australian higher education sector has been embracing international students for decades, with most of them receiving such education for free or subsidized fees until the mid-1980s.[31] There was a pivotal shift in 1986, when the Australian universities were allowed to accept full-fee-paying overseas students, making IE become a service export sector to generate revenue for both the universities and country. After the 1986 reform, additional policy initiatives have been launched for further IE development, making education services as the fourth-largest export in Australia, after iron ore, coal and natural gas.

28 GOV.UK (2024d).
29 Johnson (2023) and Campion (2024).
30 These are the University of Melbourne (ranked 39th), Monash University (58th), The University of Sydney (61st), Australian National University (73rd), University of Queensland (77th) and UNSW Sydney (83rd). See Times Higher Education (2025).
31 Before 1986, overseas students studying in Australia benefited from government subsidies ranging from 100% for sponsored students under Australia's aid programme to 45%-68% for those paying the Overseas Student Charge. See Higher Education (1991).

5.2 The Australian IE sector was nonetheless severely hit by the COVID-19 pandemic with the number of higher education students studying in Australia on student visas falling annually by 5.1% in 2020 and a further 12.6% in 2021 (**Figure 5**). The pandemic also exposed the risks of high concentration of overseas students in terms of sources (e.g. Mainland, India and Nepal) and in management and commerce programmes (taking up about 40% of overseas enrolments). As a policy response, the Australian government released the Australian Strategy for International Education 2021-2030 in November 2021, aiming to build a more sustainable IE sector with new growth opportunities.

**Figure 5 – Number of international higher education students in Australia, 2010-2023**




Note: (1) Figures in brackets represent percentage changes over the preceding year.
Source: Department of Education (2024e).

5.3 Key policy initiatives introduced over the years to develop Australia as a leading IEH are summarized below:

(a) **Study-cum-migration pathways**: In March 2013, the Australian government introduced the new Temporary Graduate visa, creating clearer pathways to permanent residence. The Post-Study Work stream of this visa allows international students to stay and work in Australia for two to four years after graduation, depending on the qualification obtained. [32] During the work period, they can gain work experience necessary for applying a skilled work visa for permanent stay in Australia. In July 2024, the Post-Study Work stream was renamed as the Post-Higher Education Work stream, with the maximum post-study stay period shortened from four to three years;

(b) **Statutory protection of international students**: Australia provides rigorous protection for international students through the enactment of Education Services for Overseas Students Act 2000 ("ESOS Act") and related legislation.[33] This Act governs the delivery of Australian education services offered to international students on student visas. More specifically, it (i) lays down the statutory requirements in the registration process and obligations of registered IE providers; and (ii) sets up the Tuition Protection Service and enforces compliance arrangements.[34] The federal government has also appointed an Overseas Student Ombudsman in each state and territory to assist international students to handle complaints about private schools, colleges, institutes and universities in Australia;

(c) **Commercialized approach in IE promotion:** Australia has commercialized IE by transferring the responsibility for its international promotion from the Department of Education to the Australian Trade and Investment Commission ("Austrade"), which promotes the "Study Australia" brand through an official website tailored for international students;[35] and

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[32] Compared with the preceding Skilled Graduate Visa, the Temporary Graduate visa extends the duration of residence in Australia, significantly increasing it from the original maximum period of 18 months. Furthermore, it expands eligibility by eliminating the requirement that restricted applications to only those with qualifications matching the Australian government's Skilled Occupation List.

[33] The ESOS Act was passed in 1991 with a subsequent 2000 version still in force today.

[34] The Tuition Protection Service may assist international students to either continue their studies through another course or different provider, or by being provided a refund for education and training they paid for but did not receive.

[35] The website contains comprehensive information for current and prospective international students, including the benefits of studying in Australia, details about the Australian education system, and current travel and visa requirements.

(d) **Promotion of homestay accommodation and work experiences while studying**: The Australian government has been promoting homestay since the 2000s as a solution to shortage of student accommodation faced by higher education institutions. As such, it excludes rent received by a taxpayer for up to two international students under a homestay arrangement in the calculation of his/her assessable income.[36] Moreover, local governments have launched campaigns to invite residents to host international students.[37]

On work rights while studying, international students are allowed from 1 July 2023 to work up to 48 hours per fortnight during term time, up from the previous cap of 40 hours. There is no such restriction on working hours during term breaks.

5.4 On **policy effectiveness**, international student enrolment in Australia grew steadily after introduction of the Temporary Graduate visa in 2013, except disruption during the pandemic years. After the pandemic, the IE sector recovered robustly in 2023 with the number of overseas higher education students increasing by 21.5% over a year earlier (**Figure 5 above**). This contributed to a surge in education export revenue which increased by 78.3% during the same period (**Figure 6**). Meanwhile, the percentage of international students who rate their overall educational experience positively rebounded strongly to 75.8% in 2023, after declining from 75.3% in 2019 to 63.0% in 2020.[38]

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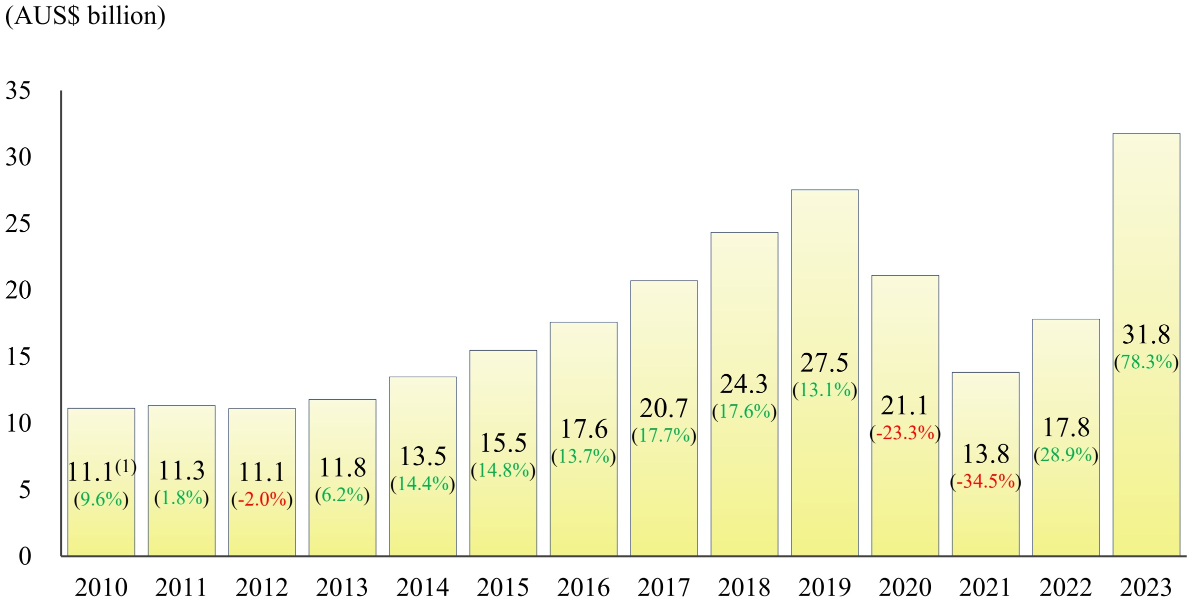
36 Parliament of Australia (2023).

37 For example, the Gold Coast city has launched the Host for the Coast campaign in 2023 where the Mayor had written about 55 000 letters to invite homestay arrangements.

38 The findings were based on the Student Experience Survey which has been conducted annually since 2012 to evaluate six areas of student experience. See Quality Indicators for Learning and Teaching (2024).

### Figure 6 – Export revenue from international higher education students, 2010-2023




Note: (1) Figures in brackets represent percentage changes over the preceding year.
Source: Australian Bureau of Statistics (2024).

5.5 Yet the influx of international students has led to spiralling rents and housing shortages in Australia, as much of purpose-built student accommodation ("PBSA") near several major universities in Sydney, Melbourne and Perth is reportedly already at capacity. In key university cities (e.g. Sydney and Darwin), the number of new household formation from international students exceeded new housing supply in 2023.[39] These situations have prompted advocacy for the government to give more tax incentives (e.g. exemption from foreign-owned land tax and stamp duty surcharges) to the PBSA sector to incite investment in building student housing.[40] Moreover, in face of growing concerns over the influx of immigrants in Australia, the government has introduced a cap of 270 000 on new international student enrolments for 2025.[41] This policy has sparked intense debate within the education sector. Observers argue that the enrolment cap could significantly impact Australia's lucrative education export industry, particularly affecting institutions with high dependence on international student revenue.[42]

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39 Begg & You (2023).
40 Parliament of Australia (2023) and Pearlman (2024).
41 The allocation of the enrolment cap is 145 000 for public universities, 30 000 for private universities and other higher education providers, and 95 000 for vocational education and training providers.
42 Crowley (2024).

## 6. Observations

6.1 In **Hong Kong**, it has strong competitiveness to become an IEH on the back of a high concentration of five Top 100 universities in the world in this small territory and emerging innovation and technology development. However, there are public concerns over a couple of issues, including (a) the mix of non-local students is not diversified and cosmopolitan enough; (b) inadequate university accommodation and knock-on effect on private housing market; (c) reports of fraudulent academic credentials; (d) low global visibility of the "Study in Hong Kong" brand; and (e) eligibility of dependents of talents admitted under TTPS for admission to universities as local students.

6.2 In the **UK**, on the back of twelve Top 100 universities in the world, it is now the second largest IEH in the world, next to the US only. The UK government has launched a number of policies to strengthen its IE leadership, including (a) work opportunities for overseas students while studying and after graduation; (b) new and competitive education offerings; (c) launching global promotional campaigns; and (d) promoting internationalization of its TVET sector. However, to better manage migration flows, the government has recently restricted international students from bringing dependents to the UK during their studies.

6.3 In **Australia**, it has six Top 100 universities in the world and has been one of the leading IEHs. The strengths of IE development in Australia lie on its study-cum-migration visa policy which provides overseas students easier pathway to become permanent residents after working there for a few years upon graduation. Other major initiatives include (a) statutory protection of international students; (b) commercialized approach in IE promotion; and (c) promotion of homestay accommodation and work experiences while studying. Nevertheless, the government has recently announced a cap of 270 000 on new international students for 2025 to manage migration pressures.

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Legislative Council Secretariat
11 February 2025
Tel: 3919 3181

**Appendix**

## Development of international education hubs in selected places

| | Hong Kong | United Kingdom | Australia |
|---|---|---|---|
| **1. Profile of international education market** | | | |
| (a) Market share of international students (2021) | 0.7% | 9.3% | 5.9% |
| (b) No. of world's Top 100 universities[(1)] | 5 | 12 | 6 |
| (c) Proportion of overseas students in higher education institutions (2023) | 29% | 26% | 29% |
| (d) Education services as a % share of GDP (2022) | 1.3 | 6.0 | 4.7 |
| (e) Export revenue from higher education | N/A | ~HK$216 billion (2021) | ~HK$164 billion (2023) |
| **2. Promulgation of national international education strategy** | | | |
| Current strategy | ✗ | 2019 International Education Strategy | Australian Strategy for International Education (2021-2030) |
| **3. Immigration policies on overseas students** | | | |
| (a) Admission quota/student cap | ✓ | ✗ | ✓ |
| (b) Entitlement to work part-time off-campus | ✓ | ✓ | ✓ |
| (c) Entitlement to bring spouses and dependents | ✓ | Postgraduates only | ✓ |
| (d) Post-study work rights (period of stay) | ✓(2 years) | ✓(2-3 years) | ✓(2-3 years) |
| **4. Promotion of education brand** | | | |
| (a) Designated promotion agencies/units | ✗ | British Council | Austrade |
| (b) Brand building | Study in Hong Kong | Study UK | Study Australia |
| (c) Global promotional campaign | ✓ | ✓ | ✓ |

Note: (1) Based on Times Higher Education World University Rankings 2025.

Sources: Australian Bureau of Statistics, Australian Department of Education, Census and Statistics Department, Education Bureau, Higher Education Statistics Agency, Times Higher Education and UNESCO Institute for Statistics.

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