



Australian Government

COUNCIL FOR INTERNATIONAL EDUCATION

2018 Report to the Prime Minister

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Senator the Hon Marise Payne, Minister for Foreign Affairs

Senator the Hon Simon Birmingham, Minister for Trade, Tourism and Investment

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Executive Summary

Australia's international education sector is strong and growing, with many opportunities before it. Australia enjoys an excellent global reputation, and the vast majority of international students who study here are satisfied or very satisfied with their experience learning and living in Australia. The economic, social and diplomatic benefits from this sector are substantial.

Competition is getting tougher as more nations seek to realise the benefits of internationalised education. Australia cannot rest on its record. To maintain or improve its enviable position, Australia must continue to offer international students a welcoming life experience and a high quality, value-for-money education that links to strong employment outcomes and improved career prospects. Regardless of whether international students choose to commence their career in Australia, in their home country, or elsewhere in the world, an Australian education provides a global passport to career opportunity. The established partners of China and India continue to offer opportunities for growth, but Australia needs to forge relationships now that will open up future opportunities to ensure a strong outlook for 2025 and beyond. Similarly, Australia's domestic students engaging internationally remains a key element in preparing our future workforce.

Much groundwork has been laid since the launch of the *National Strategy for International Education 2025* (the Strategy) and the complementary market development roadmap *Australian International Education 2025* in 2016. Since 2016, the Council for International Education (the Council) has strengthened relationships and found new ways to work together across the sector and government. Rather than converge around stand-alone issues and vested interests, the Council has been able to collaborate broadly and strategically, to understand and address challenges, and plan collectively how best to capitalise on opportunities and manage risks.

The Expert Members of the Council (Expert Members) have helped set a strong and forward-looking agenda. With their advice, government policy is better placed to uphold the strength and integrity of the sector. Expert Members also established three working groups to focus effort on maintaining a high-quality student experience, a collaborative approach to marketing and expanding education, training and research engagement with Latin America. The insights and active engagement of both sector and government have supported work to fill data gaps, and research has been commissioned to improve our understanding of the global education environment, and the dynamics of the sector. Together we have begun to address sector diversification, exploitation of students, work-integrated learning and employability, communicating and sharing the benefits of international education, and to identify new opportunities in emerging and established partners.

Over the next year, we will continue and extend these areas of work, through:

- providing advice on how to ensure more international students have opportunities to experience regional Australia,
- acting on the findings and recommendations of the Latin America Working Group to strengthen engagement in that region,
- implementing actions to support the Vocational Education and Training (VET) sector to capitalise on growing demand in the Indo-Pacific region, and globally, for skills,
- focusing on opportunities in the school sector,
- pursuing a strategic approach to the marketing and branding of Australian education
- communicating and spreading the benefits of international education across Australia, and
- refreshing our engagement with our two largest established partners; China and India.

The following report outlines the key achievements of the Council. This includes initiatives across government led by Council Ministers and their departments, as well as activities led by the Expert Members. The report concludes with the Council's priorities for 2019 in response to the challenges and opportunities identified throughout the report.

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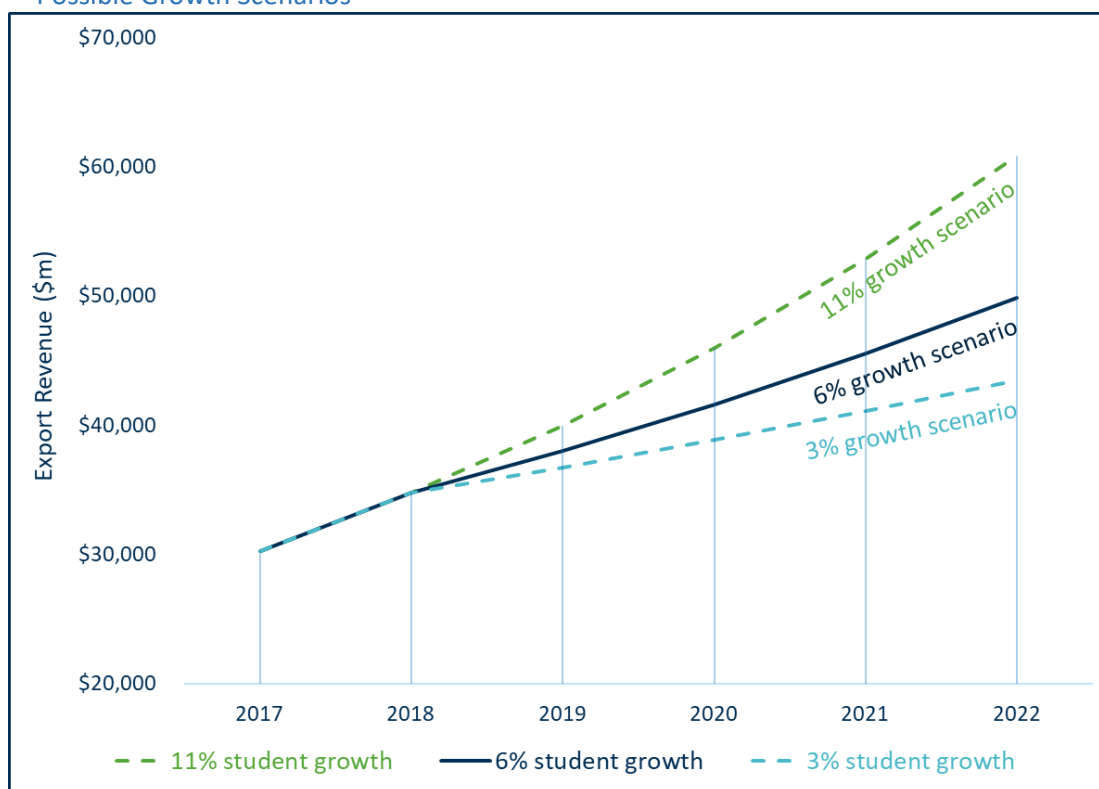
1. Sector Health Check

International education contributed more than \$32 billion¹ to the Australian economy in 2017-18. Recent estimates suggest the sector supported more than 240,000² jobs across the country in 2017.

In 2017, there were over 624,000³ international students in Australia, with growth averaging 11 per cent per annum since 2013. This rate of growth is showing early signs of slowing, and is expected to settle over the next few years. The smaller sectors of Australia's international education offerings are also showing signs of softening. In 2018, commencements in the English language, school and non-award courses all declined slightly. Despite strong growth in Chinese school enrolments in 2017, school commencements in 2018 have declined by over 6%.

While total student visa grants grew by 10 per cent in 2017-18, growth in offshore visas granted slowed to three per cent, compared to 11 per cent growth in 2016-17⁴. Further, the current growth in students commencing new courses is only six per cent. Assuming this six per cent growth is the likely growth trend for 2019 and later years, the value of the sector would be lower than it might have been if the current 11 per cent growth had persisted. Nonetheless, six per cent annual growth will still see the sector worth \$50 billion in 2022, supporting 315,000 jobs. A low growth scenario of three per cent would see a sector worth \$43 billion and supporting just over 280,000 jobs in 2022.

Chart 1. Possible Growth Scenarios⁵



¹ Australian Bureau of Statistics (2018). *International Trade in Services, by Country, by State and by Detailed Services Category, Calendar Year, 2017*

² <https://ministers.education.gov.au/tehan/australian-international-education-conference-2018>

³ Department of Education and Training (2018), *International student data, September pivot tables*

⁴ Department of Home Affairs (2018) *Student visas granted, September pivot tables*

⁵ Analysis undertaken by the Department of Education and Training based on international student data and Australian Bureau of Statistics *International Trade in Services* data.

1.1. Higher education

Higher education, comprising 48 per cent of all international student enrolments in 2018, is the largest sector of Australia's onshore international education industry⁶.

The composition of Australia's higher education student intake is shifting. China, India and Nepal are the top three student countries in 2018, China by a significant margin (nearly 40 per cent in 2018). Based on current trends in offshore visa grants, over the coming years demand from India and Nepal is forecast to continue growing, as demand from China softens. In the first quarter of 2018-19, offshore grants from China declined by 10 per cent, incorporating a 12 per cent decline in higher education visa grants⁷. At this stage, these figures represent the best early indicators of likely trends for new Chinese students commencing higher education in 2019.

On average, one in five students on Australian higher education campuses is an international student. They are not, however, distributed evenly across Australia. Instead, they are concentrated in Melbourne, Sydney and Brisbane, where most educational institutions are located and where some of Australia's highest profile universities are headquartered. Over 40 per cent of all Chinese higher education students study at just four universities – Monash, Melbourne, UNSW and Sydney.⁸

1.2. Other sectors

VET comprises 27 per cent of the international education sector, and has a more diverse student composition than higher education. The top countries of origin are India (12 per cent), China (nine per cent), Korea and Thailand (eight per cent each), and Brazil (seven per cent)⁹.

English Language Intensive Courses for Overseas Students (ELICOS) represents 16 per cent of the sector. Nearly a third of students are from China (30 per cent), followed by Brazil (12 per cent), Colombia (ten per cent), Thailand and Japan (six per cent each). The majority of ELICOS students study English as a pathway to further study, with 70 per cent of international students completing ELICOS in 2017 going on to further study in another international education sector in 2018¹⁰.

Schools represent four per cent of the sector. In 2017, almost half of international student commencements in schools were from China (51 per cent), with 13 per cent from Vietnam, five per cent from South Korea, four per cent from Hong Kong and three per cent from Germany¹¹. This small proportion is in contrast to other competitor countries, such as New Zealand where international school students account for 20 per cent of their international education students¹². As the vast majority of school students progress through to more education, our underperformance remains a vulnerability. In recognition of this vulnerability, most states and territories are delivering high school curriculum under license offshore, most notably the Victorian state government, which is delivering the Victorian Certificate of Education in 37 locations across six countries¹³.

⁶ Department of Education and Training (2018). *International student data, September pivot tables*

⁷ Department of Home Affairs (2018) *Student visas granted, September pivot tables*

⁸ Analysis undertaken by the Department of Education and Training.

⁹ Department of Education and Training (2018). *International student data, September pivot tables*

¹⁰ Department of Education and Training (2018), *Pathways for international students on a student visa*

¹¹ Department of Education and Training (2018). *International student data, September pivot tables*

¹² New Zealand Ministry of Education (2018). *International students in New Zealand, 2017 Export Education Levy Full Year Statistics*

¹³ <https://www.vcaa.vic.edu.au/international/Pages/providers.aspx>

Another important area of Australian international education is the delivery of education offshore to 119,351 higher education and 36,765 VET students in 2017. While higher education students studying offshore increased by 6.2 per cent between 2016 and 2017, there was a seven per cent decline in VET students over the same period. However, this comprised a 21 per cent decline in China countered by a 21 per cent rise elsewhere in the world. The decline in China is largely a readjustment following substantial growth and there continues to be plenty of opportunity for further growth in other parts of the world¹⁴.

1.3. Student satisfaction

The majority of international students in Australia are satisfied or very satisfied with their study and living experience. Preliminary data from the 2018 International Student Survey (with more than 84,000 respondents) shows that 87 per cent of international VET students and 89 per cent of international university students were satisfied or very satisfied with their overall study experience. The rates are even higher among private higher education (91 per cent) and ELICOS (90 per cent) students¹⁵.

Other survey data has shown that international students studying in regional locations report slightly higher overall satisfaction than students studying in metropolitan locations.

¹⁴ Department of Education and Training (2018), *International Student Data*

¹⁵ Department of Education and Training (2018), *2018 International Student Survey*

2. Challenges

Other nations are taking a more prominent place in the global education market as they see the economic, social and diplomatic benefits of international education and as the quality of their education systems improve. Maintaining Australia's value for money proposition in the face of growing competition, including from less expensive countries, is a challenge. While Australia's way of life, natural environment, stability, openness and quality of education are distinguishing assets that we maintain, the cost of living and rising tuition fees risk Australia being viewed as an expensive study option. Australia continues to see high concentrations of international students from a small number of source countries, concentrated in capital cities on the east coast. Existing partnerships continue to offer opportunities for growth, as it is often less resource intensive and less risky for providers to capitalise on existing relationships and market intelligence, rather than invest in new ones. For example, reliance on growth in Chinese student numbers in some parts of the industry poses a risk to maintaining diversity of students. Australia's challenge is to encourage providers to invest in new opportunities and to take a long-term approach.

As Australia strives for continued growth, that growth needs to be distributed and managed so that providers and the communities around them can adjust and the benefits of Australia's third largest export are shared more broadly.

Australia must keep up with the rest of the world to be competitive - customer demand is shifting in response to technological advances and their implications for the future of work. The sector's products and delivery models need to respond to these changes to remain competitive and to offer international students the skills and adaptability they will need to thrive in the future workforce.

Australia has tightened its regulatory environment over the last year to increase protection and support for international students who face unethical or dishonest conduct from education agents and employers. Nevertheless, exploitation is an ongoing risk that can harm students and damage Australia's reputation. Strong leadership from the sector, supported by the community, needs to complement the Council's action to protect and support students.

3. Opportunities

While Australia's established partners in Asia continue to grow, there are new partners and new opportunities for providing leadership in the Americas, the Middle East and parts of South and South East Asia. Now is the time to invest in understanding these opportunities and establishing the relationships needed to facilitate their development.

Opportunities to expand Australia's VET international engagement are substantial. By leveraging the strength of our VET system, Australia has the ability to work closely with emerging partners to develop training systems that are aligned to the needs of local industry. This creates demand for Australian expertise and opens up international markets and scalable opportunities for the VET sector.

ELICOS is a valuable market in itself, and an important pathway for students to undertake further study in Australia – more than two-thirds of ELICOS students on a student visa go on into other education in Australia. This pathway can be more actively encouraged, including through temporary visas other than the Student visa.

The negotiation of free trade agreements (FTAs) open up opportunities and reduces barriers to entry, allowing the sector to plan and collaborate strategically to capitalise on the new market access. Over the last year, Australia has initiated, negotiated, finalised or revised FTAs with China, Singapore, Indonesia, Peru, the Pacific Alliance (Mexico, Colombia, Peru and Chile) and the members of the Trans-Pacific Partnership.

Offshore delivery of Australian education products is another area of significant potential as it can be a reliable pathway for subsequent study onshore. The scale of demand is big, given large student populations, and it is challenging for individual institutions in Australia to respond. Australian education providers have an opportunity to work with education, industry and overseas government partners to deliver viable education services offshore.

Onshore opportunities are also ripe for diversification. International students who choose to study in regional Australia have much to offer local economies and communities; both through the goods and services they purchase, and through the opportunities they bring to Australian institutions, domestic students and local communities for global engagement. Likewise, Australia's regional areas can provide students with a unique study experience, greater community engagement, inexpensive course offerings and smaller class sizes. Despite these benefits, only three per cent of onshore international university students undertake their study in a regional area. There is much potential for growth outside of Australia's major capital cities of Sydney, Melbourne and Brisbane.

4. Delivering on the 2025 agenda

This section outlines Australia's progress against the Strategy overall, and the specific contributions of Ministerial and Expert Members of the Council.

The Council's work over 2018 focused on the following themes:

- providing the best possible student experience,
- developing a nationally consistent approach to marketing and branding of international education
- enhancing international cooperation through in-country projects, research collaboration, two-way mobility and transnational education,
- communicating the benefits of international education to the Australian community, and
- growing international education in regional Australia.

A significant proportion of this work has been progressed through the establishment of three working groups, each chaired by an Expert Member, with a focus on the following areas: student service delivery; brand and destination marketing; and expanding education, training and research engagement with Latin America.

Additional working groups focused on refreshing our engagement with China and India have been established, and others may be established over time as required.

To support the implementation of the Strategy, the Australian Government is providing \$12 million over four years (from 2016-17), for the Enabling Growth and Innovation (EGI) Program. The Council's priorities guide the allocation of funds under the EGI Program, and a number of these projects are referenced in the body of this report. All projects are listed in [Attachment A](#).

4.1. Pillar 1 - Strengthening the fundamentals

Australia benefits from a strong education system that underpins our international education offerings. Prestigious institutions, a focus on quality education and teaching, access to part-time work while studying, and a rewarding experience for students, all contribute to Australia's international education reputation. To ensure this reputation continues to improve, the Council and education providers need to work together to ensure the foundation of our education system remains strong and fit-for-purpose. Strong leadership is vital to ensure that new regulation to protect the interests of international students achieves its purpose.

4.1.1. Improving the student experience

The Council's Student Services Delivery Working Group, now concluded, met seven times over 2018, and has created a package of actions which focus on:

- strategies to reduce workplace exploitation
- ways to facilitate consistent and accurate pre-departure information
- improving international students' experience with accommodation
- fostering engagement between international students and communities, and
- identifying best practice in improving the employability of international students.

The Expert Members will lead and promote the implementation of these actions across the sector in 2019, including priority actions to prevent workforce exploitation. Expert members will also consider the Student Accommodation Association's *National Property Accreditation Scheme*.

4.1.2. Empowering international students

Supporting and empowering international students is critical to ensure that the voice and experiences of students inform future policy and regulation decisions. Through funding from the EGI program, the Council for International Students (CISA) is being supported to deliver an engagement and new leadership program to help

international students engage on campus, and to support one another to deal with mental health issues and workplace exploitation.

4.1.3. Strengthening employability

Work-integrated learning through clinical placements, work experience, internships and mentorships, provides different learning opportunities from those available in the classroom, as well as increasing the work-readiness of students. Universities Australia have been commissioned under the EGI program to undertake an audit of work-integrated learning to provide an understanding of the extent and modes of work-integrated learning, and the opportunities and barriers to participation. Audit findings will provide the foundation for further work to determine how best to encourage and support learning that connects to the world of work.

The Australian Technology Network of Universities (ATN) is also undertaking an EGI project on work-integrated learning. The project includes the development of resources and online modules for international students to support effective participation in work-integrated learning. This project, which will be piloted at five universities, will provide recommendations for broader adoption of the project across Australia's higher education sector.

4.1.4. Better access to data and research

The 2018 International Student Survey, undertaken in collaboration with the International Education Association of Australia (IEAA), English Australia and state and territory governments, was the fifth iteration of this biennial survey. The main data in the survey is based on the International Student Barometer (ISB), so can be benchmarked against other major international education destinations. Key preliminary findings were announced in October 2018. International students are very happy with Australia as a study destination, with 89 per cent of international university students and 87 per cent of international VET students reporting that they were satisfied or very satisfied with their experience living and learning in Australia.

Additional research activities underway include:

- the inaugural survey of offshore students undertaking Australian higher education and VET programs,
- the establishment of ongoing surveys focused on the employment outcomes of graduates who completed higher education in Australia, and
- research into the experience of international students who study in Australia's regional areas, focused on the relative costs of studying and living compared to metropolitan counterparts

To plan for better data to support international education policy, IEAA undertook a data stocktake identifying education providers' views on the range and utility of existing international education data, and perceived data gaps. The final report on this project will be published in early 2019. Specific recommendations included improving access and alignment of datasets across government, and building or enhancing the collection of information on:

- international students in regional areas,
- offshore education delivery (also known as transnational education),
- graduate outcomes, and
- the student experience.

4.1.5. Maintaining the reputation of our qualifications

The Australian Qualifications Framework (AQF) is the national policy for regulated qualifications in the Australian education and training system, and provides the foundation of Australia's reputation for quality. The Australian Government has commissioned a review of the AQF to ensure that it continues to meet the needs of students, employers, education providers and the wider community, including international stakeholders. The

Review Panel was established in July 2018 and the final report is due in June 2019. The review will help to maintain Australia's international reputation for educational quality.

Since the AQF was last reviewed, there have been significant changes in the way education is delivered, including through the introduction of sub-qualifications and new delivery technology.

The AQF has wide ranging impacts beyond the education sector, for example employment and migration legislation. The AQF review, along with other government reviews such as training package reform, proposed review of the Australian and New Zealand Standard Classification of Occupations (ANZSCO) database and the design of a new employment services model for 2020, will have intersecting implications that need to be considered and planned for. The AQF's excellent reputation has led to its use as a model for other nations when developing their own quality frameworks.

4.1.6. Enhancing the regulatory frameworks

Student recruitment agents play a vital and influential role in supporting Australia's international education. Nearly 75 per cent of international students (470,000 students in 2017) come to study in Australia through an education agent. Past problems with agent conduct have prompted regulatory strengthening.

The Australian Government worked with the sector to develop the Agent Code of Ethics, and revise the *National Code of Practice for Providers of Education and Training to Overseas Students 2018*. These are designed to support the safety and welfare of students, especially those under the age of 18 years, and provide transparency in information for prospective students. Since August 2017, the Australian Government has shared information about education agent performance directly with education providers, and will progress to making this information public to help providers and students to work with the highest performing agents.

4.1.7. Ensuring our ELICOS standards are fit for purpose

Australia's international education sector benefits enormously from the ELICOS sector, which supports international students to make strong personal connections, remove geographical barriers and bridge cultural divides. To ensure *all* English language instruction delivered to overseas students is governed by the high-quality standards that Australia is known for, the Australian Government revised ELICOS standards in January 2018. This change broadened the definition of an ELICOS course to include all courses or training that are solely or predominately of English language instruction delivered to overseas students.

4.1.8. Reducing the financial burden on providers

The Tuition Protection Scheme (TPS), funded through a levy on international education providers, protects international students if their education provider is unable to deliver their course. While the number of provider closures is increasing, sector growth has led to increased income from the levy beyond that needed to support the service. From 2018, the TPS levy was reduced by 75 per cent, reducing the burden on providers while still providing the required protection for students. The effective operation of the TPS will provide the basis for a similar scheme's extension to some domestic students.

4.2. Pillar 2 - Making transformative partnerships

Collaborations and partnerships form the cornerstone of Australia's international education industry. Whether between businesses, education providers, students, alumni, and governments (both domestic and internationally), connections play an important role in increasing the number of students accessing our education offerings, and helps build Australia's soft power internationally.

The Council has progressed several areas of work in this area, including:

- ensuring Australians understand and appreciate the benefits of international education,

- maintaining our reputation as a welcoming, friendly and open society,
- encouraging the development of a well-aligned international education environment through multilateral agreements,
- increasing engagement with Latin America,
- development of FTAs,
- encouraging a deep understanding of the Indo-Pacific region by supporting Australian students to live, study and undertake internships in the region, and
- celebrating our global alumni.

4.2.1. Fostering community and employer engagement

Partnerships between the international education sector and the Australian community will help to ensure that the benefits of international education are shared, and that international students have the best possible experience in Australia. Funded by EGI, IEAA has developed an industry and community engagement toolkit, providing information about the benefits international students and their families bring to communities and employers. This initiative will support industry champions to create meaningful engagement between students, prospective employers, and communities. IEAA will publish the community engagement toolkit in early 2019.

4.2.2. Developing new partnerships in Latin America

The Council's Expert Members established a Latin American Working Group to report on opportunities to enhance Australia's competitive positioning in the region and overcome barriers to education, training and research engagement. This is the first time Expert Members selected a geographic region for intensive focus. To date, Australia's engagement with the region has been heavily weighted towards onshore ELICOS and VET delivery, with Australia's approach to cooperation seen by many Latin American partners as short-term and commercially driven.

The Latin America Working Group led an extensive consultation process to inform its sector-driven report, which was delivered to the Council in late 2018. The recommendations outline how government, the sector and industry can work together to increase education engagement with the region by building knowledge of Latin American partners; delivering appropriate products; improving market access; and promoting Australia in a more targeted and coordinated way. The development of a market action plan for Mexico could be a model for engagement with other countries in the region.

The negotiation of a FTA with the Pacific Alliance (Mexico, Colombia, Peru, and Chile) has been complemented by the installation of a new Counsellor (Education and Research) for the Pacific Alliance in early 2018. Based in Mexico City, the new position further strengthens Australia's engagement with this economic bloc, alongside the existing Counsellor position based in Brasilia. Australia's dedicated education representation in the region focuses on forging and maintaining government-to-government relationships, supporting policy development and capacity-building, and expanding education, research and training engagement with Latin America. Expert Members met with the newly appointed Education Counsellors for Brasilia and Mexico City in February 2018, immediately prior to their deployment.

4.2.3. Building on the Indian Economic Strategy

There are significant growth opportunities for Australian business over the next 20 years in India. Mr Peter Varghese AO's independent report to Government, released July 2018, *An India Economic Strategy to 2035, Navigating from Potential to Delivery* (the India Economic Strategy), maps a pathway to build bilateral economic engagement out to 2035. It highlights education as the flagship sector. Expert Members received an update from Mr Varghese on the development of the India Economic Strategy in February 2018, and discussed opportunities for bilateral and multilateral engagement between India and Australia, and ways to strengthen

links between the two countries. Education roundtables were held across Australia in September to engage the sector on the India Economic Strategy. A sector-led reference group is taking this engagement forward in 2019.

4.2.4. Supporting student mobility

A single, streamlined Endeavour Leadership Program has been created to support two-way mobility for short and long-term study, research and professional development opportunities across the following categories:

- Australia-ASEAN Leadership
- Australia-APEC Leadership
- Australia-Latin America Leadership
- Asia-Pacific Leadership
- Global Leadership.

The new program (created by merging the Endeavour Scholarships and Fellowships and the Endeavour Mobility Grants) will better target funding to ensure that opportunities are sustainable into the future and aligned with strategic priorities.

The inward-bound ODA-funded Australia Awards, managed by DFAT, continues to strengthen engagement with important partner countries and to showcase the Australian education sector. For 2019, DFAT has offered over 3,000 Australia Awards scholarships and short courses to individuals from over 55 developing countries. These include 50 Australia Awards ASEAN Scholarships.

The New Colombo Plan (NCP) 2019 mobility round was announced in July 2018 and will support around 11,800 Australian undergraduates from 40 universities to participate in projects in 36 host locations across the Indo-Pacific. The 2019 NCP scholarship round was finalised in November 2018 and will send 125 scholars from 37 universities to 24 NCP locations. Increased interest in scholarship programs in the Pacific, ASEAN and India reflected the priority Australia attaches to developing closer people-to-people and institutional links with these locations. By the end of 2020, the NCP alumni network will have grown to around 40,000.

4.2.5. Building lasting connections with alumni

There are now more than 2.5 million international alumni who have studied at Australian universities. *The Australian Global Alumni Engagement Strategy 2016-2020* is a whole of government public diplomacy initiative, developed in collaboration with Australia's education sector. Through outreach activities and events hosted by Australian posts around the world, we have created another means to maintain ongoing relationships with our alumni and foster deeper linkages with Australia. Together with a range of social media and other communications, we are now better placed than ever before to showcase the success of our global alumni to demonstrate, to Australian and international stakeholders, the inspirational stories of successful alumni who are now making a positive difference to Australia's engagement with the world.

4.2.6. Maintaining practical visa settings

The Simplified Student Visa Framework (SSVF), introduced on 1 July 2016, is key to supporting sustainable growth of the international education sector by ensuring that visa settings remain competitive whilst maintaining high levels of immigration integrity.

In 2017 the Australian Government conducted a high-level appraisal of the SSVF policy settings, with input provided by key industry stakeholders through the Education Visa Consultative Committee (which includes Expert Members). The appraisal found that the SSVF is generally operating as intended, functioning effectively in managing risk and supporting sustainable growth in the international education sector. Government endorsed and published the SSVF Appraisal in May 2018 with a number of recommendations to fine-tune the

operation of the immigration risk framework. Work is underway to implement these recommendations, with several areas already complete. The Australian Government has:

- changed the name of the immigration risk framework, to the evidentiary framework, to clarify its purpose,
- commenced a communications campaign about the requirement for a student to obtain a new student visa if they change to a lower AQF level course,
- worked with agencies to assist education providers to target genuine students, and
- commenced an analysis of the impact on provider Evidence Levels of transferring accountability for immigration risk from the recruiting provider to the student's onshore provider.

4.2.7. Improving coordination across government

The importance of international education is recognised by all state and territory governments; all jurisdictions have developed comprehensive international education strategies. Commonwealth and state and territory trade ministers have agreed to pursue collaborative international education marketing activities, including through co-design and co-investment.

To ensure state, territory and Australian government agencies share information, advance policy priorities and consider risk in the international education sector, the Commonwealth State and Territories International Education and Training Forum met a number of times in 2018 and have committed to a range of coordinated activities, including: developing consistent messaging around the benefits international education delivers to Australian communities.

To ensure alignment of marketing messages and in-country promotional activities, the Australian Government has reinvigorated its International Education Marketing Forum. A key outcome for the Marketing Forum this year was a successful social media campaign in five growth countries, reaching over 12 million people, encouraging prospective students to consider studying in jurisdictions outside of the east coast capital cities (see 4.3.2).

4.2.8. Leveraging multilateral partnerships

Australia was instrumental in the development of the new *Asia-Pacific Regional Convention on the Recognition of Qualifications in Higher Education* (also known as the Tokyo Convention). The new treaty-level agreement supports fair and transparent education mobility and provides a dedicated legal forum for cooperation on qualifications recognition. It is significant because it provides ratifying countries with a dedicated forum for cooperation to ensure that qualifications are recognised as fully and widely as possible. The recognition of Australian qualifications abroad is fundamentally important to student, academic, education provider and labour mobility, and underpins the success of Australia's international education sector. Australia, as one of six member-countries to ratify the new Convention so far, will actively encourage other countries to join.

Australia also led the drafting of a Global Convention on international education, which will be considered at the UNESCO General Conference in 2019. If adopted, this will be the first global treaty in higher education.

The G20 has not historically included education as a major focus, however in 2018 the G20 explored the 'future of work' as its theme, and for the first time took the significant step to establish a specific stream of work on education. Australia highlighted the important role of VET and industry engagement in education in preparing students for their working futures.

The Association of Southeast Asian Nations (ASEAN) comprises 10 countries of major significance to Australia - Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, the Philippines, Singapore, Thailand and Vietnam. Australia is working as a technical expert to help ASEAN implement the new ASEAN Qualifications Reference Framework (AQRf). The AQRf is one of the most significant education policy innovations in the region, being

the first regional qualifications framework in Asia, and has triggered major educational reforms across Member States. Australia, together with New Zealand, is providing funding and technical support.

Through our work with the Asia-Pacific Economic Cooperation (APEC), Australia has led the development of:

- a Quality Assurance in Online Learning Toolkit, to enable APEC economies to quality assure blended and online higher education courses delivered in-country;
- a set of non-binding Guiding Principles for Research Integrity, to facilitate research cooperation; and
- occupational standards in key industry sectors, to provide a better understanding of the core skills and knowledge required for priority occupations and to support skills recognition across the Asia-Pacific region.

4.2.9. Growing bilateral partnerships

Australia has been working bilaterally with individual countries to progress qualifications recognition and other objectives in areas of growth potential. For example, Australia and Vietnam recently signed two Memoranda of Understanding to align education and training systems for greater market access and student mobility, alongside an action plan to implement a competency-based training system linked to industry. Government, Council and Australian providers are working on next steps for the partnership between Australia and Vietnam.

4.3. Pillar 3 - Competing globally

Australia benefits enormously from the large numbers of international students that choose to access our education system. To drive Australia's competitive edge, Australia is pursuing a number of key projects, including the development of a new nation brand. Diversification is at the heart of Australia's growth agenda – both in terms of student profile (source country and course type) and study location. Each section of the international education sector has unique strengths, conditions and needs.

4.3.1. Ensuring a coordinated approach to destination marketing

To ensure the development of Australia's new nation brand (see 4.3.3 below) takes into account views of the international education sector, the Council established a Brand and Destination Marketing Working Group (now concluded) to strongly represent the Council through the nation brand consultation process.

One of the key outcomes of the Brand and Destination Marketing Working Group was the development of a market prioritisation framework, a data driven framework to identify areas of highest value and interest across jurisdictions and sectors. Specifically, the framework:

- Identifies where joint marketing activities can be most beneficial (prioritisation)
- Outlines potential models and approaches to collaboration and co-design (collaboration opportunities)
- Supports the management of critical incidents through activation of the international education Reputational Risk Response Framework.

The Expert Members will lead and promote the use of the market prioritisation framework across the sector in 2019. The framework has been introduced to the revitalised International Education Marketing Forum and will be considered in the context of planning future marketing activity.

4.3.2. Promoting Australia's excellence

Australia's education, training and research strengths and assets are being reflected in a new nation brand that helps to underscore our broader national image overseas. A refreshed brand will reinforce Australia as a quality provider of education, as well as an internationally competitive investment destination, a great place to visit, and a trusted exporter of premium goods and services.

Australian Government is also developing, under the auspices of the EGI program and in partnership with states and territories, a marketing resource toolkit. The toolkit, consisting of core messages underpinned by evidence, will be shared with the sector and destination marketing bodies to help improve the consistency of Australia's international education marketing messages.

4.3.3. Growing international education in regional Australia

In November 2018, Expert Members released a consultation paper on growing international education in regional Australia. Submissions from peak bodies, education providers and other key stakeholders will inform the Expert Members' discussions and advice to government in early 2019.

In partnership with all states and territories, the Australian Government launched the *#GoBeyond* social media campaign which ran from April 2018 to June 2018, targeting international students in Indonesia, Philippines, Brazil, Colombia and Malaysia. The goal was to raise awareness of study opportunities in regional Australia. The campaign reached over 12 million people and proved the value and opportunity of coordinated marketing efforts, as well as providing insights on how to better engage prospective students digitally.

4.3.4. Pursuing strategic growth opportunities

To support the sector to make more strategic growth decisions, the Australian Government launched a new online tool '*Where to Compete?*'. The tool provides insights into opportunities and barriers by country, sector and delivery mode – matched with the latest student and visa data and benchmarked against global economic indicators. The tool enables providers to consider the relative merits of opportunities, supporting diversification efforts. It currently provides insights for 41 countries with plans to expand to include more countries and more insights on competitor activities based on user feedback.

4.3.5. Building the capacity of our schools to engage internationally

To contribute to the development of a sector strategy for schools, Expert Members engaged in an intensive policy discussion in November 2018 that identified key priorities and actions to support the sector to engage more deeply in international education. The discussion drew on a range of evidence and research, including the survey of the onshore schools sector that was included in the enhanced *International Students Survey 2018*, and initial findings from two research projects funded under the EGI program.

4.3.6. Facilitating offshore delivery of VET

In order to support the VET sector to develop new, scalable initiatives to tap into growing international demand for skills, a range of education and training products for providers to deliver under license offshore have been developed, ranging from AQF qualifications to non-accredited short courses. These products are designed to enable Australian VET providers to offer customised training solutions at both country and individual business level. International Skills Training (IST) courses are one example, offering locally tailored and affordable training options to meet the huge demand in-country for skilled workers, which Australian Registered Training Organisations (RTOs) can deliver offshore. The IST courses have been delivered in a number of countries, initially India and now China, and an IST advisory group is working alongside government in supporting opportunities for further expansion.

4.3.7. Supporting diversification into growth areas

To support diversification into potential growth areas, Market Action Plans are in development for Indonesia, Vietnam and Mexico. Funded through the EGI program, these plans will establish a collective view of market priorities and trial more effective approaches to collaboration across government and the sector. English Australia and IEAA conducted sector consultations to inform the Indonesia and Vietnam plans. The plan for Mexico will be developed in the context of the recommendations of the Latin America Working Group Report.

These Market Action Plans will be refined as a model to be used in the development of future market plans.

4.3.8. Competing at scale through consortia and partnerships

The global demand for skills is growing, with potential opportunities requiring delivery at scale. A low cost, high volume model is required for Australian providers to realise some international education opportunities. Similarly, the increasingly competitive landscape means that Australian providers must also consider linkages with other providers or businesses, to build on each other's relative strengths and to provide world-leading student experiences. A newly launched Consortia Toolkit includes a research report and step-by-step guide to help Australian small-to-medium enterprises (SMEs) pursue large-scale opportunities through the formation of consortia and partnerships.

5. The year ahead

While Australia continues to be a destination of choice for international students, there are early signs that demand for Australian education from overseas is slowing. In 2018, year to date data indicates that student enrolment growth is slowing from a five-year average growth rate of 11 per cent. In recognition of the early signs of slowing growth, government, the Council, and the international education sector are focusing efforts on short, medium and long-term measures to counteract the potential impacts.

The Council will build on its foundation activities and continue to support students and the sector to capitalise on new opportunities and respond to emerging risks.

5.1. Ensuring sustainable growth of the international education sector

Expert Members have sought sector and community views, and will consider options and provide advice on how to diversify the international education sector, both in terms of where and what courses, international students study. They will consider a range of evidence and research, including the findings of an EGI research project by Deloitte Access Economics on diversification in international education and training.

Expert Members will identify options, in consultation with key stakeholder groups across Australia, and hold intensive policy discussions in 2019 to identify how to better capitalise on the capacity of locations outside Brisbane, Melbourne and Sydney to grow their international student engagement.

The Council, led by CISA, will also conduct a cost-benefit analysis of Australia's international education in comparison with our major competitors. This will inform discussions on how to increase the relative value-for-money of education in Australia.

5.2. Communicating the benefits of international education to Australia

The Council will continue to work to ensure the Australian community understands the substantial benefits of international education, including through championing the benefits of international education at a range of forums and events over the coming year.

Opportunities are also increasing for Australian students to study overseas. One in five Australian higher education students have an international experience during their degree, and this increases the global engagement, connections and cultural capacity of Australia's citizens and workforce.

The Council will also continue to champion initiatives such as the New Colombo Plan and the Endeavour Leadership Program, which support richer student experiences and learning outcomes, and build the capacity of Australian students to be champions for international engagement and to communicate the broader value of international education back to their peers, their families and their communities.

5.3. Growing opportunities for VET

The Council will continue to support the VET sector to engage with the opportunities available both on and offshore and consider how it can best support the sector following a comprehensive policy discussion in 2019. Expert Members will also drive the implementation of a VET international engagement strategy, to be released in early 2019. The strategy seeks to position Australia as a country of choice for the provision of quality, industry-relevant training and as an international leader in the development of a globally skilled workforce.

5.4. Improving the transparency and practice of education agents

Given the regulatory changes to formalise the Agents' Code of Conduct, the recently commenced Joint Standing Committee inquiry into the *Efficacy of Current Regulation of Australian Migration Agents*, and the

publication of information on agent performance, the Council will consider how government can support the sector to influence good practice and integrity by agents.

5.5. Improving work-integrated learning opportunities

Work-integrated learning (also known as work-based learning) provides students the opportunity to engage in learning activities connected with industry and community, enhancing their learning by connecting theory to practice, and providing an avenue for engagement with Australian industry and community partners.

Expert Members will consider the results of two EGI research projects on work-integrated learning (conducted by Universities Australia and by the Australian Technology Network). Outcomes of these research projects will be available for broader dissemination in the first half of 2019.

Work is also underway to partner with state and territory governments to promote internships and work-integrated learning programs that connect international students with employers.

5.6. Facilitating greater international engagement in the schools sector

Government and Council will continue to encourage the opportunities presented by the schools sector.

Investigating Markets for School Curriculum, Assessment and Regulation Exports, led by the NSW Education Standards Agency, seeks to identify opportunities to deliver and sell Australian school curriculum, assessment and regulatory products offshore. *Filling the Data Gap*, led by Tribal Group, is exploring better ways to capture international student cohorts in the schools sector beyond those on a traditional student visa.

The Council will also work with school education jurisdictions and peak bodies to coordinate support for international engagement, including broadening offshore delivery and curriculum licensing arrangements and identifying opportunities for Australian students to build their intercultural capabilities. This will complement the government's work to improve student support for younger international students, ensuring regulatory frameworks meet the needs of students aged under 18 years, and their families.

5.7. Implementing the recommendations from the Latin America Working Group Report

Expert Members and government agencies will work together to take forward the recommendations of the Latin America Working Group's report which provides actions to lift cooperation across government, industry and the sector. The Market Action Plan for Mexico will be developed to identify specific actions to support this.

5.8. A focus on China

The Council has established a China Working Group to consider opportunities while addressing concerns about the high concentration of students in a small number of institutions.

The China Working Group will investigate how Australia can diversify and refresh its education engagement with China to ensure it is keeping pace with China's rapidly developing education system and changing aspirations for education cooperation. The work will inform the Expert Members on strategies to manage sustainable growth in Australia's largest international student partner, explore ways to encourage Chinese students into a broader range of courses, institutions and locations around Australia, and identify new approaches to quality assurance and collaboration.

5.9. A focus on India

Through the establishment of an India Working Group, Expert Members will drive key action stemming from the India Economic Strategy. The Indian Government aims to increase its university enrolment rate from 27 per

cent to 50 per cent by 2030, and it estimates an additional 120 million skilled workers will be required by 2022¹⁶. India's tertiary age population, the largest in the world, is projected to peak at 126 million in 2026¹⁷. The India Economic Strategy makes a number of recommendations to position Australia to partner with India to support its education ambitions in the higher, secondary and vocational education sectors.

¹⁶ Mr Peter N Varghese AO (2018). *An India Economic Strategy to 2035*

¹⁷ Mr Peter N Varghese AO (2018). *An India Economic Strategy to 2035*

6. Conclusion

Australia's international education sector is growing, albeit at a slowing rate, and has many opportunities before it.

To reach the ambitious targets of the National Strategy and the complementary market development roadmap, Australia will continue to grow our education offerings, maintain our strong reputation for quality, and strive for innovation and improvement in the international education sector.

High student satisfaction, developing new and growing existing partnerships and the many other achievements listed in this report, are all sources of pride for the Council. Working collaboratively across industry, government and education providers, with the insights and active engagement of the Expert Members, Australia's response to challenges and opportunities will continue to be strong and sector led.

Attachment A: Enabling Growth and Innovation Projects

2016-17 Projects

Organisation	Project Title and Description
KPMG	<p><i>A scoping study of a 'sharing economy' model for international student accommodation in Australia</i></p> <p>The project examines the feasibility of a user review ratings scheme for international student accommodation and makes recommendations for future models which could be used in Australia.</p>
Universities Australia	<p><i>Developing employability opportunities for international students by undertaking an audit of work-integrated learning</i></p> <p>A work-integrated learning (WIL) audit provides a comprehensive overview of current WIL activity. The project will identify barriers and opportunities to providing greater opportunities to enhance the employability skills of graduates.</p>
Council of International Students Australia	<p><i>Council for International Students annual conference</i></p> <p>This project provides funding to support the ongoing sustainability of the conference and of the Council for International Students Australia, including diversifying participation in the conference and a forum on the student experience.</p>
Harvard Project for Asian and International Relations	<p><i>Harvard Project for Asian and International Relations Conference</i></p> <p>This project primarily provides funding for scholarships and bursaries to support participation in the conference, and to highlight the opportunities available in the Australian education system.</p>
Enhanced 2018 international student survey - This project consists of eight sub-projects	<p><i>Data Stocktake and Data Gaps Analysis</i></p> <p>The project will include a consultation across all education sectors to identify provider perspectives on the utility of existing international education data available and perceived 'data gaps' (including qualitative survey-based data).</p>
	<p><i>Onshore English Language Intensive Courses for Overseas Students</i></p> <p>Focusing on ELICOS students, this project continues a biennial process in which international students participate in a survey investigating their student experience on and off campus.</p>
	<p><i>Onshore schools sector research</i></p> <p>The survey examines international secondary school students' experiences in Australia.</p>
	<p><i>Onshore higher education and vocational education and training</i></p> <p>Focusing on higher education and VET, the 2018 survey continues the biennial survey in which international students across Australia participate in a survey investigating their student experience on and off campus.</p>
	<p><i>Offshore higher education research</i></p> <p>This survey investigates the experience and satisfaction of students at offshore locations undertaking Australian higher education programs.</p>
	<p><i>Graduate employment outcomes research</i></p>

	<p>This survey investigates the outcomes of international graduates who completed qualifications in Australia.</p> <p><i>International student costs of studying and living in regional versus metropolitan areas</i></p> <p>Focus group and survey research will investigate the comparative costs of studying and living for international students in regional and metropolitan areas. This may inform marketing strategies to encourage more international students to study in regional areas.</p> <p><i>English Language Intensive Courses for Overseas Students (ELICOS) all-visa students data collection</i></p> <p>This annual survey-based data collection involves capturing data about all international students in ELICOS colleges across Australia, including those on visitor/tourist visas, working holiday maker visas and other types.</p>
Universities Australia	<p><i>Enhancing international cooperation and regional engagement through the China-Australia Higher Education Cooperation Program</i></p> <p>The China-Australia Higher Education Cooperation program increases the number of partnerships between Chinese and regional Australian universities, helping to promote regional Australia as a key study destination for Chinese students.</p>
Australian Academy of Science	<p><i>Enhancing research collaboration between Australia and the Americas through postgraduate research student internships</i></p> <p>This project allows postgraduate research students from the United States and Latin America to undertake a research internship program of up to 10 weeks in Australian higher education and research institutions. The project builds on the arrangements currently in place with US, Brazil and Mexico, and allows for extension to Argentina, Chile, Colombia and Peru.</p>
English Australia	<p><i>Raising the profile in China of Australia's excellence in the delivery of English language training</i></p> <p>The project investigates the drivers and conditions to develop a standalone English Language Intensive Course for Overseas Students (ELICOS) market with China encompassing both onshore recruitment and offshore delivery.</p>
Australia Indonesia Centre	<p><i>Transforming Relations with Indonesia through Policy Collaboration</i></p> <p>This project commissions research to help government transform relations with Indonesia through policy collaboration on education and training. The research identifies how Australia and Indonesia can reduce barriers to cooperation, and create new opportunities for Australian providers to help Indonesia meet its education and skills needs. It will also identify where Australia can share expertise in regulating and quality assuring education systems with Indonesia, as its education and training needs change.</p>
Australia India Institute	<p><i>Strengthening Strategic Engagement with India</i></p> <p>This project commissions research to identify new approaches to strengthen the education, training and research relationship between Australia and India. The research will help Australia's education, training and research institutions to build stronger linkages with Indian counterparts and overcome access barriers. It will also consider how Australian qualifications can become better known in India, to improve the job prospects for Australian and Australian-qualified Indian students in India.</p>

Austrade	<p><i>Strategic messaging framework</i></p> <p>This project delivers a new messaging framework for use across Australia's international education and training sector, and by all levels of government. The Framework improves the quality and consistency of how Australia's strengths are positioned internationally.</p>
Austrade	<p><i>Digital experience gap analysis</i></p> <p>The project analyses the range of digital channels used by international students and education providers, how they relate to each other and how stakeholders engage with them.</p>
Austrade	<p><i>Market action plans</i></p> <p>This project establishes a common framework to trial improved approaches to coordinating market development activities across Australian, state and territory governments, peak bodies and providers.</p>
International Education Association of Australia	<p><i>Building and strengthening support for international education in Australia</i></p> <p>This project targets engagement with industry and communities to develop a toolkit to assist in raising the profile of international education into the future.</p>

2017-18 Projects

Organisation	Project Title and Description
Council of International Students Australia	<p><i>International Student Engagement and Leadership program</i></p> <p>This project will improve the engagement of international students on university campuses nationally and help international students in supporting each other in addressing mental health issues, workplace exploitation and campus-based engagement.</p>
English Australia	<p><i>International Student Mental Health – training to support a better experience</i></p> <p>This project will provide training for teachers and staff to provide better support for international students.</p>
Universities Australia	<p><i>International University Students and Pre-departure Information: What are they getting and what do they need?</i></p> <p>This project will document the perspectives of pre-departure information currently provided to international university students, and develop a report showcasing examples of best practice.</p>
ISANA International Education Association	<p><i>National Code of Practice for Providers of Education and Training to Overseas Students 2018 Online Tutorial</i></p> <p>This project will develop and deliver an instructional tool for international education professionals to understand and meet their obligations under the <i>National Code of Practice for Providers of Education and Training to Overseas Students 2018</i> (the National Code).</p>
Victorian TAFE Association	<p><i>Growing Regional Pathways to Higher Education</i></p> <p>This project will see metropolitan providers partner with regional providers to jointly deliver ELICOS and VET programs, leading to regional growth in international student university enrolments.</p>

Australian Technology Network	<p><i>WIL to Work: Enhancing International Student Capacity through Work-Integrated Learning</i></p> <p>Resources and online modules for international students to support effective participation in work-integrated learning (WIL) will be piloted across five universities. Recommendations for broader dissemination across the higher education sector through an International Student Engagement Strategy for WIL will also be developed.</p>
Universities Australia	<p><i>Australia-Germany Joint Research Cooperation Scheme</i></p> <p>This project will support continued research collaboration between Australia and Germany, as well as facilitate high quality research outcomes and the exchange of skills and knowledge of mutual benefit to Australia and Germany.</p>
Deakin University	<p><i>Establishing an Industry-led Training System for the Logistics Sector in Indonesia</i></p> <p>This project actively engages with Indonesian and Australian government agencies, public and private sector education providers and industry stakeholders to establish an industry-led governance, quality assurance and validation system for the Indonesian logistics sector.</p>
International Education Association of Australia (IEAA)	<p><i>Building and Strengthening Support for International Education in Australia - Phase 2</i></p> <p>Building on IEAA's 2016-17 Phase 1 EGI project, Phase 2 will develop and implement a targeted, cohesive dissemination strategy for the existing online toolkit/resources, to effectively convey and reinforce the benefits of international education to broader industry and local communities.</p>
NSW Education Standards Agency	<p><i>Investigating Markets for School Curriculum, Assessment and Regulation Exports</i></p> <p>This project will identify opportunities to deliver and sell Australian school curriculum, assessment and regulatory products in offshore markets, through a scan of competitors, analysis of trends in the sector, and analysis of specific target markets and segments.</p>
Deloitte Access Economics	<p><i>Market Diversification in International Education and Training</i></p> <p>This research project will develop potential policy and strategic responses to the risks associated with insufficient diversification in international source countries. An assessment of the impact and appropriateness of these responses will be undertaken, to identify those that would be most useful, as well as areas for further research and analysis.</p>
IEAA	<p><i>Economic Benefits Interactive Online Tool</i></p> <p>This project will facilitate and communicate a better understanding of the benefits of international education through an interactive online and open source economic modelling tool, which provides disaggregated result for the national, states, territories and regions.</p>
Tribal Group Pty Ltd	<p><i>Filling the Data Gap: International Engagement in the School Sector</i></p> <p>This project will undertake a national exercise to design and implement a methodology and system to capture international engagement data in the Australian secondary school sector.</p>
Navitas	<p><i>International Higher Education Student Flows Via Global Data Integration</i></p> <p>This project will integrate disparate sources of international higher education data to understand the macro trends in student mobility from source countries to major destination countries. It will include the development of a data integration tool; three detailed case studies; and the sharing of insights via a report and workshops.</p>