

Submission -

A New Australian Strategy For International Education

Perspectives of independent providers in the higher education, vocational education, training and skills sectors.

> Australia's international education architecture is a labyrinth of disconnected government departments, agencies, funding mechanisms, market promotion and funding arrangements.

> > This needs to change.

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Introduction

Time For Bold Reform To Support Students & The Education Sector

The Independent Tertiary Education Council Australia (ITECA) is the peak body representing independent providers in the higher education, vocational education, training and skills sectors. ITECA welcomes the opportunity to provide advice to the Australian Government on the shape of the 2021-30 Australian Strategy for International Education.

The development of the Strategy comes at a time of crisis for Australia's international sector due to the Covid-19 pandemic. The closure of international borders has certainly insulated the Australian population from the worst aspects of the health crisis, but what cannot be denied is that the impact on the international education sector has been severe. Overall, onshore international student visa holders in Australia have dropped by almost 176,000 in the year to 29 March 2021,ⁱ. And when compared to the same time a year earlier, the sector experienced a fall of more than 111,000 international student enrolments by the end of March 2021.ⁱⁱ This creates a context in which bold reform is necessary.

Australia's international education architecture is a labyrinth of disconnected government departments, agencies, funding mechanisms, market promotion and funding arrangements. This needs to change.

The Strategy needs to be more than a plan to promote the sector and align some policy settings. It needs to set the framework for radical reform of regulatory arrangements, market research and funding. Importantly, the international education Strategy must be aligned with Australia's skilled migration program.

International education should not only be viewed as an export commodity, but also as well as a key asset of immense socio-cultural value for Australia. The potential to leverage the knowledge and skills of overseas students as well as our international teaching and research partners to ensure that Australia has the skilled workforce to support a growing economy needs to be fully realised. Of utmost importance, we need to build broad consensus that international students studying in Australia add to the nation's cultural diversity and to our socio-cultural national fabric.

We have the opportunity to reposition Australia's international education sector to increase Australia's standing in the world, sustain a commitment to cultural diversity, and to provide the nation with the skills it needs for the future.

The ITECA membership looks forward to working with the Australian Government on this matter.

Troy Williams FIML MAICD ITECA Chief Executive

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This needs to change.



Recommendations

Time For Bold Reform To Support Students & The Education Sector

Following extensive consultation with the ITECA membership in the higher education, vocational education, training and skills sectors that support overseas students, ITECA is pleased to make the following recommendations in the development of the new international education Strategy.

Recommendation 1 —

That the data collection and analysis tools and mechanisms in respect of overseas students and the international education sector more broadly be modernised and streamlined under the remit of a new Australian International Education Commission. by Australian education providers.

Recommendation 2 —

That a new Australian International Education Commission be established that brings together administrative, and selected regulatory functions, associated with the provision by Australian businesses and public institutions of education to overseas students.

Recommendation 3 —

That an investment be made to modernise the existing IT reporting infrastructure relied on by providers and all government agencies alike to ensure it becomes fit for purpose and fitting of a modern first-tier pillar of the Australian economy.

Recommendation 4 -

A single approach to marketing international education is needed, founded upon Australia inherent competitive advantages and the attractiveness of individual regions

Recommendation 5 —

That visa arrangements be revisited to enable students who were in Australia at the beginning of the pandemic (March 2020) and who have subsequently remained onshore, completed their qualifications and whose qualifications (at completion) are in an area of skills need, have the ability to apply for a broader post-study work arrangements. Further, for this limited group of students, this should be extended to the possibility of ultimately residency, where their skills are in areas of ongoing need.





ITECA looks forward to working with the Government on the development of the new international education Strategy. The challenges before the sector are real and ramifications will endure beyond the reopening of international borders. It is expected that the recovery, to pre-pandemic levels, will take some years. What will be certain is that the sector will be different, with international students supported in new and innovative ways.





Part 1 —

Independent International Education

Independent providers in the higher education, vocational education, training and skills sectors that support international students are often overlooked as government delivers its policy settings.

Number of students with independent providers —

There are a number of different ways in which overseas students are counted by the Commonwealth Government, leading to challenges in ascertaining the size and scope of the sector and participants in it. The Department of Home Affairs publishes data on student visa holders; while the Department of Education, Skills and Employment publishes data on overseas student enrolments and commencements from the Provider Registration and International Student Management System (PRISMS), as well as on higher education enrolments (counted differently). The National Centre for Vocational Education Research publishes data on enrolments in vocational education and training (counted differently again). As such, these data are not consistent across Government or readily comparable to one another.

Only some of these data offer high-level published information as to the number and proportion of students studying with different provider types and by location.

Independent international higher education sector —

The independent higher education sector is relatively small; however, enjoys a global reputation for the delivery of high quality programs both domestically and internationally.

The Department of Education, Skills and Employment reports that in 2019, there were 81,295 overseas students studying a higher education program with an independent education provider in Australia. iii These data are different from the commonly used enrolment data sourced from PRISMS, and are instead from the different higher education reporting systems.

The inability of the Australian Government to develop and manage a streamlined and consistent mechanism for the collection, analysis and reporting of data in respect of the international education sector is a significant issue. The main

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tool relied on by CRICOS-registered providers and government agencies alike – PRISMS – is over twenty years old and has had a series of updates and patches but never a significant upgrade. Further, PRISMS does not 'talk to' and is not consistent with or integrated with other key systems. It is critical that a new, modern system is built to ensure the international education sector can be effectively managed in the context of future risks and opportunities.

Independent international vocational education and training -

Australia's independent vocational education and training sector is worthy of particular recognition. The NCVER reports that, in 2019, there were 224,430 undertaking a vocational education and training course in Australia. Around 85%, or 190,570, of these were studying with independent providers. ITECA stresses the importance of understanding the many benefits that can be attributed to international students studying in Australia; however, the economic value cannot be overlooked.

Off-shore delivery by independent tertiary education providers —

Independent tertiary education providers are increasingly focussed on delivering education and training in-country in overseas markets. By way of example, ITECA is working with the Association of Indonesian Private Universities (APTISI) to develop partnerships between Australian and Indonesian education providers to deliver Australian qualifications across Indonesia. This activity is expected to grow significantly as international borders reopen in 2022; however, there is little to no visibility of or support for this critical activity. Data collection needs to improve to measure off-shore delivery by tertiary education providers.

Online delivery by independent tertiary education providers —

Independent tertiary education providers have often been the pioneers in the innovative delivery of Australian education – including online – into off-shore markets. Today, independent providers are leading the way in the introduction of immersive technologies such as virtual reality in the health sector. The independent tertiary education sector also recognises that online delivery is more than placing learning, research and assessment resources online with the development of online support mechanisms. The challenge for policy makers is that, as with off-shore delivery, there is little visibility of this activity.

From a policy perspective, there is an important aspect to the growth of independent tertiary education sector in international education, being that — in stark contrast to public providers — it has been achieved with little recourse to and no reliance on, public funds and no risk to the taxpayer. It is private capital, expertise and entrepreneurship that has been leveraged to grow the independent international education sector.

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Part 3 -

Diversifying Australia's Offering To Overseas Students

With little to no government support, Australia's independent international education sector has been pioneering new ways to support international students. Whereas the traditional model had been to attract students from overseas to study in Australia, the closure of international borders coupled with local lock-downs resulting in campus closures, saw the rapid transition to full online delivery.

New technologies in online delivery —

Not only have independent international education providers made the rapid transition to online delivery, but they have also radically restructured their offering to more fully support students. There is a realisation that online delivery is more than placing downloadable content online and managing assessments and exams, but that online delivery needs to support the overall student experience and welfare. Many independent providers are setting the standard in terms of supporting students.

Independent international tertiary education providers and leading the development of immersive technologies such as virtual and augmented reality in course design. This platform offers a more complete student experience in disciplines not previously suited to online learning.

Off-shore delivery -

Independent international education providers are increasingly looking to new ways to support students and one of increasing interest is delivering Australian qualifications to Australian standards in third countries. A ground-breaking partnership between ITECA and the Association of Indonesian Private Universities (APTISI) to develop partnerships between Australian and Indonesian education providers will see Australian qualifications delivered across Indonesia. The delivery by Australian providers of both higher education qualifications and vocational education and training qualifications in off-shore markets opens up a market for education delivery that is much broader than the market for students looking to head beyond their borders for delivery.

The next generation international education strategy should place a clear emphasis on supporting the international education sector in new types of delivery, including delivery off-shore, whilst also recognising the continuing longstanding reputation of Australian institutions to support international students studying domestically.

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Part 3 -

Bringing Together Disparate Government Activities

Prior to the onset of the Covid-19 crisis, Australia had enjoyed strong growth in the international education sector. The primary driver of this was the growth in the business of providers operating across the higher education, vocational education, training and skills sectors. Relatively little thought was given to the strategic opportunities for diversification, to external threats, and to the sustainability of the sector. The *National Strategy for International Education 2025* provided a broad direction for the sector; however, it lacked cohesiveness in terms of direction and the failed to fully appreciate the disparate nature of the architecture tasked with delivering the outcomes of the Strategy.

A sector that lacked a coordinated threat response mechanism —

The 2019-20 bushfire crisis, followed shortly after by the Covid-19 pandemic which endures, demonstrated the shortcomings in Australia's ability to support the sector. The ad-hoc and time-limited International Education Global Reputation Taskforce^v that included representatives from government and the international education sector, could only provide recommendations to the Minister. It lacked the authority to do more.

The Covid-19 pandemic, and the results of measures to deal with it, have demonstrated the deficiencies in Australia's ability to develop and implement a coordinated response to address threats to the sector. While myriad stakeholders in Australia and abroad review options and discuss possible approaches – some independently and some in concert with others – competitor nations such as the United Kingdom and Canada are rapidly gaining a hold in Australia's traditional markets. In no way is this a criticism of the individuals or organisations involved (within government and other stakeholders), rather, it reflects the different approaches and disparate agendas that exist. The views of the ITECA membership are clear – as a nation, Australia needs to do better if it is to ensure the sustainability and vitality of international education and its capacity building benefits for the long-term.

The ad-hoc framework created to respond to the 2019-20 bushfires, and later the Covid-19 crisis, served to highlight the major challenge, which had existed for some time, with Australia's approach to international education. The simple fact is that across government there are too many Departments, agencies and associated bodies that ostensibly share a commitment to supporting the international sector but do so in disparate and disconnected ways.

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Different approaches, agendas and focusses —

Consultations with the ITECA membership have identified the many different regulators, promotional bodies and funding organisations that independent international education providers deal with. Added to this are the government agencies associated with the related task of managing Australia's visa framework. These arms of government include:

- <u>Department of Education, Skills & Employment:</u> Oversight of the framework governed by the *Education Services for Overseas Students Act 2000* including the Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS) and processes associated with issuing and managing Confirmations of Enrolment (COE) for overseas students. The policy responsibility here is divorced and disconnected from the regulatory activity (excluding for schools) while the Department maintains some responsibility for certain international engagement activity and overseas posting. The Department has a data gathering mandate in respect of overseas students while the majority of risk analysis and use of this data is undertaken by other agencies.
- Department of Home Affairs: Managing the student visa framework.
- Australian Skills Quality Authority: Regulatory oversight as the responsible agency for the vocational education and training sector under the Education Services for Overseas Students Act 2000 (Cth).
- <u>Tertiary Education Quality and Standards Agency:</u> Regulatory oversight as the responsible agency for the higher education sector under the *Education Services for Overseas Students Act 2000 (Cth)*.
- Department of Foreign Affairs and Trade: Management of scholarships and awards associated with the New Columbo Plan and Australia Awards programs.
- <u>Austrade</u>: Provision of market intelligence, typically on a fee for service basis, and administration of selected grant programs.
- Department of Industry, Science, Energy and Resources: Managing and facilitating international research partnerships relating to science and industry including Australia's international Landing Pads, and through the international network of Australian science advisors at overseas posts.
- Study Hubs: State / territory and regional bodies organisation dedicated to promoting their region as a study destination and a preferred partner for education, training, research and innovation.

The development of a new strategy for international education provides the opportunity not only to better align the work of the Departments and agencies with their disparate agenda, but to bring them together through a single entity, the Australian International Education Commission.



There is no effective coordination of the activities of these government agencies; however, ITECA readily recognises the commitment of senior public servants to working together to support the sector. The challenge is that there are competing agendas and resourcing across the sector.

The development of the 2021-30 Australian Strategy for International Education provides the opportunity not only to better align the work of the Departments and agencies with their disparate agenda, but to bring them together through a single entity.

The Australian International Education Commission —

Following extensive consultation across the independent international education sector, ITECA is recommending the formation of a new agency, the Australian International Education Commission (AIEC). This new body would bring together the different aspects of the Australian Government's international education regulatory and promotion architecture and provide a single point of reference for state / territory governments and education providers.

AIEC Role -

To provide advice and recommendations to the Australian Government on whole-of-government strategies to achieve the sustained growth of Australian education exports, to ensure the sector's resilience from external shocks and to monitor and protect the welfare of international students in Australia.

AIEC Structure -

The Commission would be established under an Act of the Australian Parliament as an independent statutory body.

With direct policy making and expenditure powers, a statutory body (i.e. a Commission) is preferable to a single statutory office holder (e.g. single Commissioner) who would be reliant upon the cooperation and performance of other Departments and agencies to deliver outcomes. That is, the Commission would be action-oriented and capable of delivering tangible outcomes and be accountable to the Parliament as opposed to a single Commissioner, for whom any outcomes are outside of their own direct control.

AIEC Governance -

The Commission would be a statutory body with a Chief Executive Officer and an Advisory Council. The AIEC Advisory Council would comprise representatives from both independent and public providers in the higher education, vocational education, training and skills, as well as ELICOS and schools sectors.

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There is strong merit in the AIEC including a blend of representatives from stakeholder organisations (e.g. Universities Australia, English Australia, ITECA, et cetera) that directly represent providers and high calibre individuals with unique specialist expertise.

AIEC Statutory Responsibilities -

The Commission would have primary policy responsibility for Australian international education in both a domestic context as well as an international context, with a notable caveat for visa integrity issues.

<u>International Education Administration:</u> Those responsibilities that that currently rest with the Department of Education, Skills and Employment (e.g. CRICOS administration, international partnership and engagement activity etc) would be transferred to the AIEC.

Market Research & Promotion: Functions relating to international education trade promotion would transfer from the Australian Trade and Investment Commission (Austrade), while matters relating to education and research scholarships currently in the Department of Foreign Affairs and Trade would also move to be overseen by the Commission as part of its broader remit.

International Agent Oversight: The Commission would be charged with a new Australian Government responsibility for the oversight of international education agents operating in Australia, consistent with an element of its remit to ensure a robust, fair and student-focused international education framework operating in Australia. Similarly, the work of the Overseas Students Ombudsman and the Fair Work Ombudsman would have direct relevance and input to the work of the Commission on an ongoing basis while remaining independent from the Commission.

<u>Tuition Protection Service (TPS):</u> Policy responsibility for overseas student tuition protection would move to the Commission; however, the TPS would continue to retain administrative responsibility for tuition protection and operate separately within the Department given its broader domestic role. The TPS Director would liaise with the AIEC as required, especially on protecting the reputation of Australia's international education sector and linkage with domestic tuition protection issues.

<u>Immigration:</u> Responsibilities for student visa processing and the student visa framework would remain with the Department of Home Affairs; however, the AIEC would provide the relevant Minister(s) with responsibility for

The Commission would be charged with a new Australian Government responsibility of registering international education agents operating in Australia, consistent with an element of its remit to ensure a robust, fair and student-focused international education framework operating in Australia.



Immigration, Citizenship, Migrant Services and Multicultural Affairs with advice and guidance on student visa issues from an onshore and off-shore perspective.

<u>Provider Regulation</u>: Regulation of international education providers would remain the purview of the Tertiary Education Quality and Standards Agency (TEQSA) and the Australian Skills Quality Authority (ASQA); however, formal communication will exist between the Commission, TEQSA and ASQA to ensure that each is aware of, and consulted on, their regulatory activities.

AIEC Functional Responsibilities —

The Commission would be the lead Australian agency on matters associated with international education and responsible for providing support to the international education sector.

<u>Strategy:</u> Developing, refining and implementing, in concert with state / territory governments and the international education sector, the new international education strategy.

<u>Research</u>: Commissioning research into existing markets, and identification of emerging markets, to provide the sector with an understanding of the opportunities and risks associated with overseas market.

<u>Marketing & Promotion:</u> Developing and implementing, in concert with state / territory governments, a cohesive, coordinated marketing and communications strategy targeted at overseas markets, as well as key international collaborations.

<u>Immigration Advice:</u> Providing advice and guidance to the Minister for Immigration, Citizenship, Migrant Services and Multicultural Affairs on appropriate student visa policy settings, with particular reference to Australia's skilled migration program.

<u>Risk Identification & Management:</u> Working across government and the international education sector to identify, then put in place strategies to eliminate or mitigate risks to Australia's attractiveness as a study destination.

<u>Student Welfare</u>: Monitoring factors that impact of the welfare of international students studying in Australia (e.g. mental health, community acceptance and welfare) and working across government and the international education sector to put in place the strategies to deliver these.

<u>Engagement with States & Territories</u>: Working closely with and across all jurisdictions on building the domestic social licence focussing on the socio-cultural benefits of international education.

Broadly speaking, the AIEC would play the lead role in identifying what is required to support the sustained growth in Australia's international education sector along with ensuring that the infrastructure is in place to protect the welfare of international students studying in Australia.



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AIEC Funding —

Initially, and following initial establishment, a funding model based on co-investment would be adopted whereby the Commonwealth and international education providers share the Commission's annual costs.

It is important that the Commission be cognisant of the fact that there are diverse, long standing and effective international education promotion strategies across all state and territory jurisdictions, and associated infrastructure to support these at a departmental and agency level (e.g. Study Melbourne, Study Gold Coast, et cetera). In that context, and noting the need for a single outwardly focused strategy for Australia and that the jurisdictions are aligned to this, the criticality of associated marketing and communications, as well as direct engagement campaigns cannot be overstated. While each jurisdictions' capacity to retain a distinctive marketing flavour would be respected, it is essential that these activities be aligned in the context of a consistent and cohesive policy architecture in Australia's interests.

The need for a coordinated approach is overwhelming. Although Australia has set the example globally in managing the Covid-19 pandemic, this has resulted in a serious decline in students arriving in Australia. The market for international students is more intense and competing nations have developed study options and visa policy settings that, from the perspective of students, make Australia a less attractive place to study relative to competitor nations. The myriad government Departments and agencies, despite the expertise of their staff, lack the coordination and regulatory authority to develop and implement a coordinated approach and thus the Commission, as set out above, constitutes the best path forward.

Recommendation 2:

That a new Australian International Education Commission be established that brings together administrative, and selected regulatory functions, associated with the provision by Australian businesses and public institutions of education to overseas students.





Part 4 -

A Single Brand For Australian International Education

From a global perspective, Australia has a strong and justified reputation as a quality provider of education. The focus is strongly on quality across both the independent and public sectors, underpinned by effective regulators. The challenge is that rarely does Australia present a consistent market to international markets.

'Team Australia' or 'Team (Insert city name here') -

In the United Kingdom, the International Education Council works to identify actions that will lead to a major increase in education exports. The 2021 UK International Education Strategy includes a priority to provide clearer, more accessible information for international students interested in studying and working in the United Kingdom. Australia must adopt a similar outward looking forward strategy.

The challenge is that, as a nation, we do not present a consistent or clear message to international markets. Different states compete with each other, rather than competitor nations, for students. Although a "Team Australia" approach is preferred, we offer state-based campaigns to potential markets and, in many instances, individual cities are active in overseas markets. To date, the approach has been "Team Perth", "Team Gold Coast", "Team Cairns" et cetera.

Australia needs to end the parochialism not only between state / territories, but also individual cities. Out messaging to international student markets should be clear, concise – and unified.

A strong national brand for overseas markets —

Australia's international education sector needs to avoid creating confusion in the marketplace. A single approach to marketing international education is needed, founded upon Australia inherent competitive advantages and the attractiveness of individual regions. To external markets, a single brand and unified message needs to be taken forward in a way that allows individual regions and institutions to develop aligned messaging.

The task of undertaking the market research to support market promotion, and the allied task of campaign delivery, should be the responsibility of the new Australian International Education Commission.

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Recommendation:
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Part 5 -

The Alignment Between International Education & Skilled Migration

From a policy perspective there is substantial disconnect between Australia's approach to international education and skilled migration. The development of the *2021-30 Australian Strategy for International Education* offers the ability to use the international education framework to support the skills needs of Australian business.

The suggestion that there needs to be closer alignment between international education and skilled migration does not equate to a suggestion or recommendation that the right to study in Australia automatically provides an entitlement to residency. Indeed, ITECA is suggesting that it not be automatic and instead be based on nuanced policy settings and the needs of the Australian economy.

International education and migration alignment —

Australia's economic recovery from the Covid-19 pandemic has so far been faster than expected. As the Australian Chamber of Commerce and Industry (ACCI) has noted, skills and labour shortages across Australia are severely affecting business recovery from the COVID-19 pandemic. Australia needs to review its approach to attracting skilled labour.

Students that have completed their studies should have the ability to apply for post-study work arrangements, and ultimately residency, if their skills are in need at the time of qualification completion. The timing of this is critical and care should be taken to ensure that the assessment is made at the time of completing their course rather than at commencement. The potential of studying in Australia should not, in itself, be a primary factor in a student's decision to study in Australia.

First and foremost, student's attraction to Australian education should be based upon the quality of delivery. Adherence to this principle would preserve the framework recommended in the 2011 review of the student visa program that determined a successful applicant must be both a genuine temporary entrant and a genuine student. VII

In redesigning the link between international education and migration, care needs to be taken so as to ensure that post-study work rights for international students are not perceived as a back door into the labour market or residency.

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Off-shore delivery and skilled migration alignment -

The new international education strategy should also recognise that the provision of education off-shore can constitute a successful strategy to enlarge the pool of skilled migrants, an approach validated in the higher education sector^{viii}.

Despite the best efforts of stakeholders and government, in the minds of overseas students wishing to come to Australia to study – and sadly in the minds of many international student agents - there will always be a direct link between studying in Australia and the right to work. This nexus needs to be broken. The alignment of a post-study work arrangement to the skills needs of Australia at the completion of studies (rather that at the time of commencement) helps achieve this.

Recommendation 4:

Students that have completed their studies should have the ability to apply for post-study work entitlement, and ultimately residency, if their skills are in need at the time of course completion.



References

viii Transnational higher education and skilled migration - Evidence from Australia: Levatino, Antonina (2015)

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DESE, student visa data as at 17 May 2021

ii DESE, student visa data as at 17 May 2021

iii DSES Higher Education Statistics 2019, Section 7 Overseas Students

iv NCVER Data Builder

v NCVER Data Builder

vi ACCI Media Release: Acute skills shortage arising from blocked migration pipeline (8 Apr 2021)

vii Australian Government: Strategic Review of the Student Visa Program (2011)