



Australian Government

COUNCIL FOR INTERNATIONAL EDUCATION

2019 Report to the Prime Minister

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

Senator the Hon Michaelia Cash, Minister for Employment, Skills, Small and Family Business

The Hon Karen Andrews MP, Minister for Industry, Science and Technology

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1. Executive Summary

The ten-year *National Strategy for International Education 2025* (National Strategy) is designed to grow Australia's international education sector to become more adaptive, innovative and globally engaged. A high quality and sustainable international education sector delivers benefits and opportunities for students, for Australia and for the world.

The implementation of the National Strategy is a joint effort between governments, the education sector and the wider Australian community. This collaboration is essential to ensure the needs of students, business and industry are met as the sector grows and responds to changing international dynamics.

This is the third annual report to the Prime Minister. It sets out the activities and achievements under the direction of the Council for International Education (Council) in 2019 under the three pillars of the National Strategy. Significant achievements include:

- the delivery of *Growing International Education in Regional Australia*, the associated launch of the Destination Australia regional scholarship program and the announcement of adjustments to visa settings to offer students who live and work in regional locations an additional one to two years of post-study work rights;
- the delivery of reports and recommendations by the China Working Group and India Reference Group; and
- the completion of sector strategies for the Vocational Education and Training (VET), Schools and English Language sub-sectors.

As the mid-point of the National Strategy approaches in 2020, the Council has reviewed progress over its first four years and considered which goals are on track and which may require additional focus and effort to be achieved by 2025. These priorities are reflected in the work plan that has been developed for 2020 (see [Attachment A](#)).

After consecutive years of growth, Australia's international education sector now faces significant new challenges: the rebalancing of global political and economic power; increased competition from other nations; and the importance of ensuring international education becomes a sustainable element of Australian society and the economy. It is time for the Council to examine how the National Strategy can be refreshed so Australia can negotiate the challenges and grasp the opportunities that will emerge. Expert Members will lead this work in 2020.

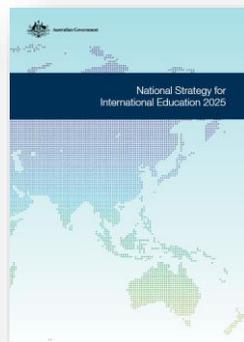


Image 1: Cover of the *National Strategy for International Education 2025*.

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2. Sector Health Check

Australia's international education sector is a true success story and is looked upon by many countries as a world leader. The largest service export industry and fourth largest export industry overall, international education contributed more than \$37.6 billion to the Australian economy and supported more than 240,000 jobs across the country in 2018–19.

Student numbers, composition and trends¹

There were over 720,000 international students in Australia to September 2019, 11 per cent more than for the same period last year, and with growth averaging 11 per cent per annum since 2013. Broadly in line with proportions in previous years, the largest volume of enrolments were in higher education (49 per cent), followed by VET (28 per cent), English Language Intensive Courses for Overseas Students (ELICOS) (15 per cent), the non-award sector (5 per cent) and schools (3 per cent).

The first nine months of 2019 saw continued strong growth in higher education (12 per cent) and VET (17 per cent). English language courses grew at a much lower rate (3 per cent) and enrolments in schools and non-award courses both declined (-4 per cent for both). The fall in school and non-award enrolments is mostly due to declining numbers of Chinese students, who have represented around half of all international students in Australian schools over recent years.

Enrolments from Latin America grew by 10 per cent in the period January to September 2019, compared with the same period in 2018. Ninety-one per cent of enrolments from the region were in VET and ELICOS, 92 per cent of enrolments were in NSW, Queensland and Victoria, and 89 per cent of Latin American enrolments were from the top three source countries: Brazil, Colombia and Chile.

Across all education sectors combined, enrolments by Chinese students grew by 13 per cent in 2018, but this softened to 3 per cent growth in 2019 (incorporating new student decline of 1 per cent). Offshore visa grants from China were down 1 per cent in the first six months of 2019 compared to the same period in 2018, the first decline after many years of growth. While this trend from Australia's largest student partner country deserves attention, growth from India – Australia's second largest student cohort – remained strong for much of 2019, particularly in areas such as masters by coursework in information technology. Figure 1 depicts the relative change between Chinese and Indian enrolments.

¹ Department of Education International student data: <https://internationaleducation.gov.au/research/international-student-data/>

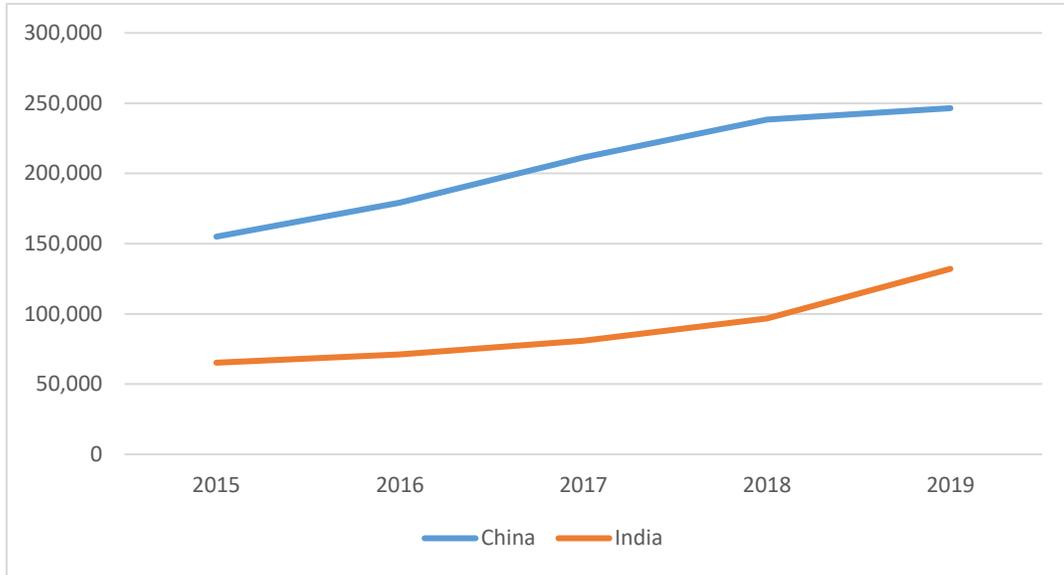


Figure 1: International student enrolments from China and India, year-to-date to September 2019.

Australia’s top 25 source countries for commencements (new enrolments) demonstrated mixed levels of growth. Figure 2 shows the performance of each for the year to date at September 2019, in terms of volume (right hand axis, marked by the orange line) and growth (left hand axis, marked by blue bars for growth and red bars for decline). Ten of Australia’s top 25 markets showed double digit growth, with the Philippines, Saudi Arabia, India and Sri Lanka showing the biggest increases.

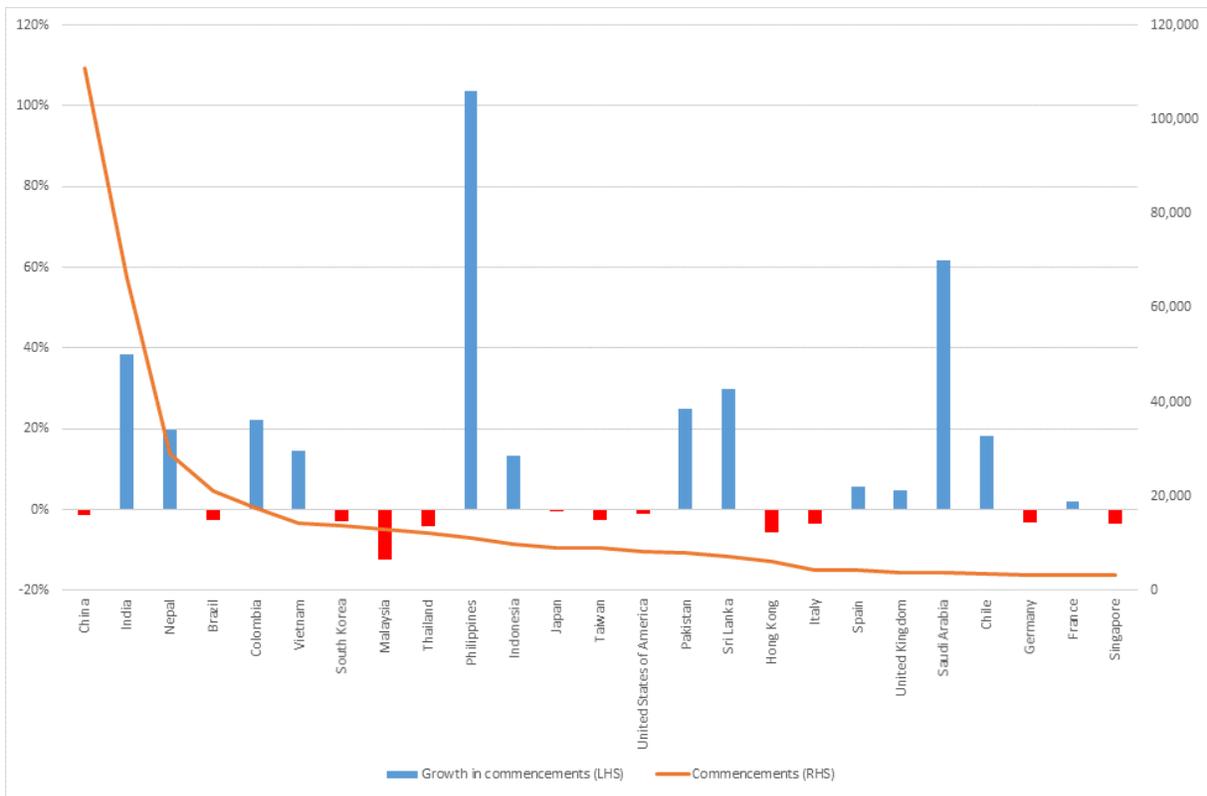


Figure 2: Performance of the top 25 source markets for international student commencements, year-to-date to September 2019.

Australia's success in attracting international students becomes clear when contextualized against the efforts of our competitors. Figure 3 shows the overall and relative performance of the five main English-speaking destinations in attracting globally mobile tertiary students. The tables mainly use 2016 data from the United Nations Educational, Scientific and Cultural Organization (UNESCO) Institute of Statistics (the latest comparable data for all five destinations). Australia attracted 17 per cent of all globally mobile tertiary students going to one of these five main English-speaking destinations (the United States attracted 49 per cent, the United Kingdom 22 per cent, Canada 9 per cent and New Zealand 3 per cent). Figures in green indicate where a country attracts more students from a particular country than its share of the global market and figures in red indicate where a country attracts fewer students from a particular country. For instance, Australia attracts 17 per cent of all international students worldwide, so China (19 per cent, more than our total market share) is in green and South Korea (8 per cent, less than our total market share) is in red.

	Students	US	UK	Canada	NZ	Australia	Australian growth in 2017
China	589,046	53%	15%	10%	3%	19%	14%
India	233,626	58%	7%	9%	6%	20%	12%
Saudi Arabia	77,825	75%	11%	8%	1%	6%	-13%
South Korea	77,463	78%	6%	6%	2%	8%	37%
Vietnam	43,799	51%	9%	5%	3%	33%	6%
Malaysia	43,770	19%	40%	2%	4%	35%	-1%
Canada	38,319	74%	15%	NA	1%	10%	-30%
Hong Kong (SAR)	36,059	22%	46%	6%	0%	26%	-1%
France	36,051	18%	33%	43%	1%	4%	-5%
Nigeria	34,984	32%	46%	17%	0%	5%	15%
All countries	1,970,226	49%	22%	9%	3%	17%	13%

Figure 3: Top ten source countries for international students going to the main English speaking destinations in 2016.

Notably, Australia has a very strong presence in ASEAN countries and South Asia, relevant to our English speaking competitors. While Australia is also an attractive destination for students from much of East Asia, students from Japan and South Korea – countries with which we have strong diplomatic and economic relations – are both relatively underrepresented in our student cohorts. Despite strong recent growth in Latin America, the nearby United States remains the dominant destination for students originating there.

Student satisfaction – onshore education²

The majority of international students studying in Australia are satisfied or very satisfied with their study and living experience. The 2018 International Student Survey found that international students' overall satisfaction rate, and their satisfaction with their learning experience, was 89 per cent. This was an improvement on 2016 results and one percentage point above the satisfaction rate for Australia's major competitors. Students' satisfaction with living in Australia was even higher, at 90 per cent, compared to 88 per cent in other countries.

On average, the top five factors for deciding to study in Australia are the quality of teaching (98 per cent), reputation of the qualification (95 per cent), personal safety and security (95 per cent), reputation of Australia's education system (94 per cent) and reputation of the education provider (94 per cent). Australia was the first-choice country for 75 per cent of students who study here.

² Department of Education 2018 International Student Survey:
<https://internationaleducation.gov.au/research/Pages/Data-and-Research.aspx>

Student satisfaction – offshore education³

In 2017, there were approximately 119,000 higher education and 36,500 VET students studying offshore through Australian institutions.⁴ In 2018, the Department of Education surveyed the satisfaction of offshore higher education students for the first time. Eighty-two per cent of those surveyed were studying undergraduate courses, and satisfaction levels varied with the location of the student between 85 per cent in China and 90 per cent in 'other' locations (which included students in Bhutan, Mauritius, New Zealand, Papua New Guinea, Sri Lanka, United Arab Emirates and Vietnam).

The key factors in students' choice of an Australian institution were the reputation of the qualification (97 per cent), the reputation of the institution (95 per cent), the earning potential of the qualification (95 per cent), personal safety and security (95 per cent) and the specific qualification title (94 per cent).

Seventy-two per cent of students were local to their study location. Ninety-four per cent of students said they were engaged with their study and 70 per cent said they would recommend or strongly recommend their institution to other students. More in-depth analysis found student satisfaction with how well their program is organised, including how well institutions assist new students to understand program structures, has a high correlation with students' propensity to recommend their institution to others. This is a useful finding to inform the development of Australia's transnational education programs.

³ Department of Education 2018 Offshore Higher Education Student Survey:
<https://internationaleducation.gov.au/research/Pages/Data-and-Research.aspx>

⁴ Department of Education offshore education data:
<https://internationaleducation.gov.au/research/offshoreeducationdata/pages/transnational-education-data.aspx>

3. Implementing the National Strategy – Progress in 2019

2019 saw the delivery of a number of key policy and program priorities that contribute to the goals of the National Strategy. The Council's priorities for 2019 included ensuring sustainable growth of the international education sector through regional diversification, supporting greater international engagement in the VET and schools sectors, increasing transparency and good practice by education agents, pursuing a strategic approach to marketing and branding for Australian education, implementing the findings of the Latin America Working Group, and elevating its understanding and approach to the education markets in China and India.

Progress on each of these priority actions has been achieved through partnerships between and across government and the sector, both at home and offshore. This includes a coordinated whole-of-government approach, including Australian Government agencies and state and territory governments, informed by research funded through the Enabling Growth and Innovation (EGI) program (see [Attachment B](#)). Ongoing engagement from the Expert Members of the Council and stakeholders more broadly, including both those from within the sector and those representing communities where international students study and live, have ensured the work of Council is informed by a broad range of perspectives.

3.1. Making transformative partnerships

Maximising the potential of Australia's international education sector depends on effective collaboration between education providers, business, communities, governments, students and alumni. These partnerships require careful maintenance to ensure the sector – and its global reputation – remain strong. In 2019, the Council focused on the growth and development of partnerships through taking a lead role in key multilateral fora, the collaborative development of sector strategies for VET, ELICOS and schools, and targeted bilateral engagement with key partner countries and regions.

[Sector strategies for VET, Schools and English Language](#)

The VET, schools and ELICOS sectors all have potential for substantial development and growth. The VET strategy was launched in early December and strategies are under development for the other two sectors to support greater international engagement.

The *VET International Engagement Strategy 2025* recognises the potential for Australia to play a central role in meeting the rapidly changing global skills needs of industry, business, employees and governments around the world. Priorities include consistent Australian Government promotion, branding and messaging, increasing market access opportunities offshore and promoting Australia's VET frameworks and systems internationally, and developing innovative training products, such as the International Skills Training (IST) courses, to meet specific market needs. EGI funding was provided for several projects in 2018–19 to support the implementation of this strategy, including development of a VET Strategic Messaging Framework with resources for Australian diplomatic posts to promote the Australian VET system, and a VET Market Access Toolkit to support providers enter and operate in international markets.

Schools are the foundation of Australia's highly regarded education system, which takes an evidence-based and future-focused approach to teaching and learning to soundly prepare students for further education and the future of work in the global labour market. They also serve as a pipeline to further study in the Australian system. The draft Schools Sector Strategy identifies the need to capture the full range of international engagement activities in schools, to communicate better and understand the value of the sector. A project, *Filling the Data Gap: International Engagement in the School Sector*, is now underway to meet this need. Funded through the EGI program in 2017–18, the Tribal Group is mapping international student cohorts and

activities, and creating a tool to capture this data annually for international school students on student and non-student visas. Also funded under EGI, the New South Wales Education Standards Authority and Nous Group undertook market research through an in-market parent survey to determine the greatest opportunities for exporting Australian school products, finding Vietnam, Malaysia, China, Philippines, India and Indonesia as the key markets in the short to medium term. The final report was published in March 2019.⁵

The strategy also identifies the need to expand opportunities for all Australian schools to participate and engage in international activities, for which two projects were funded through EGI in 2018–19:

- *Supporting Australian Schools to Build International Engagement*, led by the Monash University Faculty of Education, to develop a toolkit to support school communities and leaders to implement international engagement activities; and
- *International Engagement in Australian Regional Schools*, led by Indigenous Professional Services, scoping the feasibility of international engagement in regional and rural Australian schools.

Australia is one of the three largest providers of English language instruction, alongside the United States and the United Kingdom, and is well known internationally as a high quality destination for English language teaching. Student satisfaction surveys show that 90 per cent of English language students are satisfied with their experience in Australia with teaching quality and safety – two key factors for choosing to learn English here. Australia outperforms international benchmarks for English language provision in terms of overall arrival, living and learning experiences, and support offered to students learning English.⁶ The draft English Language Sector Strategy identifies issues including the need to support the wellbeing and academic preparedness of English Language students, to strengthen their pathways into further study and embrace new technologies to capitalise on future opportunities in curriculum design and delivery. These objectives are supported by EGI-funded projects including:

- *International Student Mental Health – training to support a better experience*, led by English Australia, which has provided mental health training to ELICOS teachers and staff across Australia; and
- *Pathways to Success in International Education*, led by The University of Melbourne’s Graduate School for Education, which will compare the academic outcomes of international direct entry and pathway students to identify best practice in supporting international pathway students to succeed.

Multilateral engagement

Australia’s participation in multilateral organisations offers the opportunity to influence education systems and standards across regions and other country cohorts, on matters including quality, recognition of qualifications, and two-way mobility for students and workers. Qualifications recognition fundamentally underpins Australia’s international education industry, as well as its skilled migration program. Australia’s leading role in these multilateral organisations helps promote our national interests in international education, training and research, and supports international capacity building.

⁵ NSW Education Standards Authority and Nous Group, *International opportunities for Australian school curriculum, assessment and regulatory products*: https://internationaleducation.gov.au/International-network/Australia/InternationalStrategy/EGIProjects/Documents/Final%20report%20International%20opportunities%20for%20Australian%20schooling_Nous_2019.pdf

⁶ Department of Education 2018 *ELICOS International Student Survey Results*: <https://internationaleducation.gov.au/research/pages/data-and-research.aspx>

Australia was instrumental in the development and adoption of the UNESCO *Asia-Pacific Regional Convention on the Recognition of Qualifications in Higher Education 2011* (also known as the Tokyo Convention), and has been actively encouraging countries to join. Australia was also a leading contributor to the drafting of the UNESCO *Global Convention on the Recognition of Qualifications concerning Higher Education*. The Global Convention, agreed at the UNESCO General Conference in November 2019, is set to become the first global treaty in higher education. It will provide an effective, forward-looking and sustainable framework for international cooperation in qualifications recognition through the establishment of best principles and practices, which are based on fairness, transparency and non-discrimination. These conventions will help better facilitate student, academic and institutional mobility, improve quality and enhance international cooperation in higher education. They will also support innovative Australian education practices through, for example, new transnational delivery mechanisms.

Australia is also working with the Asia-Pacific Economic Cooperation (APEC) economies to create opportunities for Australian providers to enhance online education delivery with the *APEC Quality Assurance in Online Education Project*. A toolkit has been developed for governments, quality assurance agencies and institutions to assess the quality of online courses. This quality assurance can build understanding and trust in online delivery, so it is valued like face-to-face learning, enabling greater flexibility in transnational education and recognition of qualifications delivered through online education. The Department of Education will lead a number of regional workshops with APEC members, focusing on challenges they face, and building the capacity of participating economies to develop, deliver and evaluate the quality of online courses with the aid of the toolkit.

Australia is working with APEC economies to reduce barriers to women's equal participation in science, technology, engineering and mathematics (STEM) education and the workforce through the development of a set of Women in STEM Principles. The Principles were agreed by APEC in August 2019, and are expected to assist in shaping education standards and systems within the Asia-Pacific region.

Australia is also working with APEC members Chile, Mexico and Peru, and APEC non-member guest Colombia, to pilot the use of the APEC tourism occupational standards to support the delivery of industry-relevant training tailored to the Latin American labour market. Led by the Department of Employment, Skills, Small and Family Business, this initiative will help ensure better alignment between skills training and the real world on-the-job needs of local industry.

Exporting system reforms

Strong and sustainable higher education funding arrangements for Australia's key partners can increase student access to higher education, expand opportunities for partnership and support other reforms designed to increase mobility. Australia's innovations in education systems and financing are tested, proven effective and in-demand from other nations which are working to develop their own systems.

The Department of Education is working with and supporting world-renowned expert on income-contingent loans (ICL), Professor Bruce Chapman, to encourage systemic reform in higher education funding arrangements by key partners in South East Asia and Latin America.

Work to date has included:

- assisting the Malaysian Government through technical advice on the development of an ICL model tailored to the Malaysian economic context;

- building capacity to apply the modelling to inform alternative funding approaches to its current time-based repayment loan scheme; and
- organising a three-day regional conference on income-contingent financing in Brasilia in July and presenting about ICL financing approaches and sharing Australia’s experience in transitioning to an ICL system.

As noted, the EGI program (2017–18 round) has also supported a project to identify opportunities to export school system products in six key markets. This project, *International opportunities for Australian school curriculum, assessment and regulatory products*, was undertaken by the New South Wales Education Standards Authority.

Australia’s VET sector was highlighted as an international model of best practice to the United States House of Representatives hearing on education and labour by Mr Tim Bradley, Minister Counsellor (Industry, Science and Education) in July 2019. Mr Bradley’s presentation and submission to the hearing, *Scaling Up Apprenticeships: Building on the Success of International Apprenticeship Models*, emphasised how the Australian Apprenticeships System delivers nationally recognised, stackable, adult and youth apprenticeships, designed in partnership with local industry, to promote access to small, medium and large businesses. Mr Bradley’s comments attracted strong interest from both majority and ministry members of the committee who are both grappling with how best to reform America’s approach to workforce development.



Image 2: Tim Bradley, Minister Counsellor (Industry, Science & Education), speaking at the US House of Representatives hearing on education and labour, July 2019.

A focus on China

Australia's education and research engagement with China is broad, especially in terms of government-to-government cooperation and relationships between providers across all education sectors. Australia is a key destination for Chinese international students – 17 per cent of all international students worldwide are from China – and Australian universities and research organisations have increasingly deep and long-standing research interests, engagement and expertise in China. Australia's global reputation for quality education, training and research, combined with existing government-to-government, institution-to-institution and people-to-people links, provides a solid foundation to progress the bilateral education relationship more broadly.

The Council established a China Working Group in late 2018 – co-chaired by Professor Kent Anderson and Laurie Pearcey, Pro-Vice-Chancellor (International) University of New South Wales – to look at how the government and the sector can encourage diversity and broaden Australia's education, research and innovation engagement with China. The higher education, research, schools, VET and ELICOS sectors were represented, and there were Australian Government observers including from the Department of Education, Austrade and the Department of Foreign Affairs and Trade.

The Working Group commissioned a sectoral engagement survey of education, training and research providers operating in China. It also sought perspectives from critical informants within the Australian education sector, peak industry bodies and other key stakeholders including Department of Education staff at the Australian Embassy in Beijing, and Austrade staff in Canberra and Shanghai.

The report, *The Australia-China Education Relationship: Diversity, Complexity and Maturity*, was presented at the Council's Expert Member meeting in July 2019. It provides a stocktake of the status of the Australia-China relationship, highlighting the depth of Australia's long-term education engagement with China. It identifies emerging opportunities for diversification and makes recommendations designed to elevate the relationship, promote greater sharing of education policies and information, increase research collaboration between Australian and Chinese institutions and researchers, expand marketing and promotional activity to harness emerging opportunities and regional engagement, and enhance collaboration in transnational and online education. In particular, the report identified developing a state and territory government-endorsed single senior school certificate brand to complement individual state and territory certificates for the purpose of marketing offshore delivery in competition with other destination nations.

To complement the work of the China Working Group, the *China Skills Heat Map* highlights the unique skills needs and priority discipline areas across seven Chinese provinces. Released in November 2019, the report provides an overview of the vocational education landscape in China and opportunities present for Australian providers.



Image 3: *The Australia-China Education Relationship – diversity, complexity and maturity*, a report by the Council’s China Working Group; and *Positioning for deeper engagement: a plan of action in India*, a report by the Council’s India Reference Group.

A focus on India

India is at the forefront of Australia’s education relationships. A long friendship, based on shared values and common interests, has created a strong foundation for an enduring partnership in education. Formal agreements in place since 1970 have been enlivened by student exchanges and partnerships that enrich the experience of Indian and Australian students, academics and education institutions. At 15 per cent of the total, Indian students are the second-largest cohort of international students in Australia. Opportunities for further development and engagement were identified in the *India Economic Strategy to 2035 (the India Economic Strategy)* released in 2018, and the Council commissioned the India Reference Group to drive action and capitalise on this potential. The Group met six times and sought advice from industry experts around Australia, as well as from the Australian High Commission staff in New Delhi and Mumbai. It undertook a suite of consultative workshops with more than 200 sector experts in Brisbane, Sydney and Melbourne, facilitated by the CEO of the Australia India Institute, Professor Craig Jeffrey. The Group’s report, *Positioning for deeper engagement: a plan of action in India*, was endorsed by the Council’s Expert Members in July and launched by Minister Tehan in November. It recommends:

- key pieces of research to better identify solid and viable opportunities and a Market Action Plan to provide advice on progressing the opportunities;
- initiatives to support consistent approaches to marketing and policy, including from Australian governments;
- practical support for education institutions, including a dedicated researcher hub in New Delhi,
- a review of opportunities for skills development and training, and government-led missions in India; and
- strengthening cohesion in Australian education branding.

These recommendations build on the success of the education sector under the *India Economic Strategy*, which include a successful state and territory forum on state government engagement in India and significant progress on qualifications recognition. They will inform further activities under the *India Economic Strategy*.

The Australian Government has appointed Ministerial Champions to drive forward work in the four priority sectors outlined in the *India Economic Strategy*. Senator the Hon Simon Birmingham, Minister for Trade, Tourism and Investment has been appointed India Economic Strategy Ministerial Champion for tourism, Minister Tehan will be champion for education; Senator the Hon Bridget McKenzie, Minister for Agriculture, will be champion for agribusiness; and Senator the Hon Matthew Canavan, Minister for Resources and Northern Australia, will be champion for resources.

Australia will continue to build engagement with India through a series of activities delivered under the Australia India Business Exchange (AIB-X) program, focusing on these four priority sectors. Minister Tehan led a senior university and research delegation to New Delhi in November 2019, which focused on building both government and institutional connections between Australia and India. As well as attending a range of events organised by universities to strengthen their connections with India, the Minister joined his Indian counterpart, the Hon Ramesh Pokhriyal, Minister for Human Resource Development, in launching the Australia India Research Fellowship and opening the India Australia International Education and Research Workshop. The strong university and education delegation demonstrated Australia's commitment to working closely with India as a key partner in the Indo-Pacific region.

The AIB-X program will continue in 2020 with a high-level government and business delegation to expand Australia's trade, investment and education relationships.



Image 4: Minister Tehan at an agricultural research event in India, November 2019.

Implementing the recommendations of the Latin America Working Group

Latin America is a key region with potential for stronger education partnerships and growth. Brazil and Colombia are both now in the top ten source countries for international students, with enrolments from the region growing particularly strongly in the VET and ELICOS sectors. The 2018 Latin America Working Group report *An Educated Choice: Expanding Australia's Education, Training and Research Engagement with Latin America* made 22 recommendations on how government, the sector and businesses could work together to develop a more strategic and coordinated approach to building partnerships with countries in the region. In 2019, a short-term implementation reference group coordinated stakeholder action to assist in implementing these recommendations. It produced a report identifying the priority actions with Latin America to be taken forward by the sector in order to build knowledge, expand engagement, promote Australia and commit to action. The Australian Government is continuing to focus on reducing barriers and creating an enabling environment, working closely with the sector to ensure ongoing alignment of actions and the development of long-term relationships with partners in Latin America. The EGI program is also funding projects to build information and data resources on education systems in Latin America and to research strengths in the region.

Work in 2019 will lead to next year's bilateral Research Collaboration Week with Brazil. This event will support the development of joint research projects to enhance collaboration with the region's leading producer of research publications. This builds on the Australia-Americas PhD Internship Program, supported through the 2016–17 EGI round, which has provided 43 high calibre students from Argentina, Brazil, Colombia and Mexico with first-hand experience in Australian research institutions to help establish strong collaborative international research links between Australia and Latin America.

The Education Counsellors in Brazil and Mexico continue to lead government-to-government engagement on systems development and alignment.

Working with Malaysia

Minister Tehan visited Malaysia in November 2019, his first visit to the country as Education Minister, to further strengthen Australia's education and research cooperation with this key strategic partner in Southeast Asia. Australia and Malaysia enjoy a longstanding education relationship, going back to 1951 and the original Colombo Plan, and have strong transnational education links with almost 20,000 students studying an Australian higher education qualification in Malaysia in 2018. While in Malaysia, the Minister opened the new University of Wollongong (UOW) Malaysia Kolej Damansara Utama (KDU) joint venture. The UOW partnership is the latest significant operation by an Australian university in Malaysia, joining branch campuses of Monash, Swinburne and Curtin universities. Minister Tehan held high-level bilateral talks with the Malaysian Minister for Economic Affairs and Deputy Minister for Education, focusing on shared challenges and opportunities for collaboration, for example on ensuring that graduates are prepared for a rapidly changing workforce. The visit comes ahead of Malaysia's 2020 APEC host year and an anticipated visit to Australia by the Malaysian Education Minister, Dr Maszlee Malik, which will create further opportunities to expand education and research relationships.



Image 5: Minister Tehan speaking at the opening of the UOW Malaysia KDU joint venture, November 2019.

Government-to-government engagement

Open and effective forums for ongoing bilateral dialogue and engagement with key education partners are essential for deep and rewarding relationships and collaboration in areas of mutual interest, enhancing our economic and social ties with valued regional partners.

Japan High Level Policy Dialogue

Japan is one of Australia's key partners in the Indo-Pacific. The Department of Education and Japan's Ministry of Education, Culture, Sports, Science and Technology (MEXT) engage in a regular High Level Policy Dialogue (HLPD) to exchange information and experiences on education challenges and reforms, and to identify priorities for bilateral education cooperation.

The HLPD takes place approximately every two years alternating between Canberra and Tokyo, with the most recent held in Tokyo in December 2018. The renewed Australia-Japan Memorandum of Cooperation on Education, signed by the Minister for Education, Mr Masahiko Shibayama, and the Australian Ambassador to Japan, Mr Richard Court AC, on 4 December 2018 in Tokyo, laid the groundwork for the Fifth HLPD on Education hosted by MEXT on 11 December 2018 in Tokyo.

At this meeting, discussion focused on research collaboration, transnational education, qualifications recognition, lifelong learning, language education and vocational education. Senior officials agreed both sides share similar challenges in preparing students for the evolving global economy. In particular, given the strong focus on its ageing demographic and the skills gaps it faces, the Japanese Government appreciated learning about Australia's experience in successfully assimilating and upskilling migrants to Australia. In turn, we recognised Japan's strong capacity to commercialise their research output. Some 75 per cent of Japan's research and development is undertaken by the corporate sector. To that end, the Australian Embassy in Tokyo worked closely with Universities Australia to facilitate a Research Commercialisation symposium on 9–10 October 2019, immediately following the Australia-Japan Business Council annual meeting in order to enable greater industry-academia collaboration.

Discussions at the HLPD, regarding Australia's FEE-HELP (Higher Education Loan Program), have helped guide the development of Japan's new policy for income contingent loans in higher education. The meeting also highlighted the collaborative work between Australia and Japan in multilateral frameworks including APEC and UNESCO.

The release of Japan's *Third Basic Plan for the Promotion of Education 2018–22*, designed to position Japanese society to respond to an increasingly globalised workplace, an ageing population and significant skills gaps, presents opportunities for Australian institutions willing to proactively engage in the Japanese market. As such, the Department of Education and its staff in Japan will continue to collaborate actively to present these opportunities to Australian education providers.

MEXT Officer Exchange Program

Since 1996, the Department of Education has participated in a reciprocal officer exchange program with MEXT. The program has a broad aim to enhance the bilateral relationship between Australia and Japan and reinforce the constructive and comprehensive education dialogue that occurs between the two departments. It provides a valuable opportunity for Australian and Japanese policy officers to conduct policy-relevant research to inform more effective policymaking and deepen the bilateral education relationship.

To support these aims, the research carried out by the exchange officers aligns to areas of mutual strategic interest identified in the biennial Australia-Japan HLPD. In 2019, Mr Yuki Sawaura, the MEXT exchange officer in Australia, completed research into the transnational education policies of Australia and Japan, along with the nations' experiences of establishing institutions abroad.

Australia-Korea Joint Committee on Education

The Department of Education's bilateral relationship with Korea is guided by a Joint Committee on Education (JCE), which comprises senior officials from the department and the Korean Ministry of Education. The JCE provides a framework for a deeper bilateral education relationship and allows the departments to identify priorities for bilateral cooperation and exchange information on education challenges and reforms. A key priority in our education relationship with Korea is research collaboration. To that end, the JCE endorsed a research project led by Yonsei University to analyse the social networks of the most active Korean and Australian researchers based on co-authorship citations. The project report identified best practice strategies for research collaboration, and recommended that a Korea-Australia Researcher Network be established (see next page). The ongoing discussions resulting from the JCE meeting have put in place an agreement for the establishment of a pilot program of the IST course in Korea. The IST pilot program in Korea will facilitate expansion of international VET and is scheduled for delivery in January 2020.

Engagement with Indonesia

Indonesia's 2019 announcement to open the establishment of foreign branch campuses offers significant opportunities for Australian providers. The Department of Education is working with Indonesia on implementation of its new policy on transnational education. It is also pursuing opportunities to expand Australia's education engagement with Indonesia through joint working group meetings, ongoing policy dialogues on qualifications recognition, quality assurance and VET policies and systems, and discussions with Indonesia to simplify its foreign researcher arrangements, through both bilateral and multilateral platforms.

Developing researcher collaboration

Much research development and innovation is the result of researcher-to-researcher relationships and collaboration. Supporting the formation of these relationships globally can contribute to a dynamic, effective and impactful Australian research sector. Australia's global research partnerships leverage our strong research capacity and deliver cutting-edge outcomes across disciplines.

Korea-Australia Researcher Network

The Korea-Australia Researcher Network (KARN) was launched on 31 May 2019 and is an initiative of the Department of Education and the Australian Embassy in Seoul. The KARN seeks to address the under-representation of Australian researchers in Korea and enhance researcher-to-researcher linkages and collaboration between the two countries. It will showcase best practice in research collaboration and highlight grant opportunities and seminar programs that support Australian and Korean research priorities.

The Australia-Germany Research Cooperation Scheme

The Australia-Germany Research Cooperation Scheme is jointly funded by Australian universities, and an EGI grant to Universities Australia and the German Academic Exchange Service (DAAD, Germany's national agency for the support of international academic co-operation). The Scheme facilitates high-quality research collaboration in areas of mutual benefit and highlights our world-class education and research system to an important international partner. It directly supports Australian early career researchers to work with colleagues in Germany and collaborating German researchers to spend time at Australian universities.

Supporting student mobility

Two-way mobility for students and academics into and out of Australia provides opportunities for knowledge sharing, career development and collaboration between individuals, institutions and businesses. Supporting this mobility strengthens our bonds with valued partner nations. Australia delivers a number of scholarship programs to support this.

More Australian students are taking advantage of opportunities to study abroad. In 2018 over 52,000 Australian students studied abroad, with 49 per cent doing so in the Indo-Pacific region. As part of a growing trend, one in four domestic undergraduate students currently undertake an overseas study experience during their program.⁷

The Australia Awards provide opportunities for people from developing countries, particularly those countries located in the Indo-Pacific region, to study at Australian universities and VET institutions. In 2019, 3,161 Australia Awards scholarships and short courses were offered to individuals from over 55 developing countries.

Since the New Colombo Plan (NCP) began in 2014, around 60,000 Australian students have been awarded a scholarship or mobility grant to undertake overseas study programs in the Indo-Pacific, including in the 2020 round. In 2018–19, 11,660 scholarships and mobility grants were awarded. Forty Australian universities and more than 300 private sector organisations are participating, delivering strong institutional, business and people-to-people links. The Department of Foreign Affairs and Trade has worked to increase the diversity of students and the range of host locations and in 2019, for the first time, scholarships were awarded for Cook Islands, French Polynesia and Samoa, and mobility grants for Niue and French Polynesia. In the 2019 round, five per cent of Scholars were Indigenous, up from less than one per cent in previous years, and three times the percentage of Indigenous domestic university students. Twenty-one per cent of NCP Scholars identify as

⁷ Australian Universities International Directors Forum, *Australian Universities Learning Abroad 2018 factsheet*.

coming from a lower socio-economic background, 17 per cent are the first in their family to attend university and 30 per cent are from regional Australia.

Strengthening business, trade and investment links through alumni

Australia's millions of global alumni, many of whom become business leaders and entrepreneurs, can identify new connections for Australian businesses and add depth to Australia's trade relationships, helping to grow Australia's investment profile in the region. For many Australian businesses, the most significant barriers to growing their operations overseas arise from a lack of familiarity with local languages, cultures and customs, something that can be negotiated through respectful engagement with alumni.⁸ Under the *Australia Global Alumni Engagement Strategy 2016–2020*, the Department of Foreign Affairs and Trade works with other agencies to strengthen and build on alumni connections.



Australian alumnus, David Zhu

David Zhu graduated with honours in electrical engineering from the University of Melbourne in 2009. His passion for entrepreneurship led him to establish his company Henger, which imports dairy products into China from Australian companies such as A2 Milk and Gippsland's Longwarry Food Park.

3.2. Strengthening the fundamentals

In the face of growing competition from other countries, the shifting geopolitical landscape and pressure to demonstrate ongoing value for money as an education destination, it is more important than ever that Australia strives for excellence in its delivery of international education. This allows Australia to maintain its reputation for high standards of quality through targeted and effective regulatory frameworks, while continuing to support innovation and emerging models of delivery. Alongside data about education quality and outcomes, students' own reports of their experience have a significant impact on Australia's reputation. While international students overwhelmingly report a positive experience of their time in Australia – the 2018 International Student Survey reported that 90 per cent of students were satisfied with their living situation – governments and the sector must continue to work together to ensure students are well-prepared for their time here, and their safety, security, wellbeing, and mental and physical health are all appropriately supported.

Pre-departure information for international students

The accuracy, reliability and relevance of the information students receive before their arrival can shape their expectations and initial experiences, influencing their impressions of study in Australia. Universities Australia's project *International university students and pre-departure information: what are they getting and what do they need?* was funded under the EGI program in 2017–18. It involves research into the usefulness of the pre-departure information international students receive, including a survey of international students at universities around Australia. Due for completion in December 2019, this research will inform improvements to students' pre-departure information.

⁸ Department of Foreign Affairs and Trade, *Australia Global Alumni Engagement Strategy 2016-2020*. Linking alumni with Australian business. Fact Sheet 6

Student accommodation

The growth in international student numbers means there is increasing pressure to provide safe, secure and affordable accommodation – a fundamental element of a positive student experience. In 2018, the Council wrote to the Student Accommodation Association (SAA), as an outcome of the Student Services Delivery Working Group, recommending the creation of student accommodation standards to give providers and students clearer expectations and greater assurance when recommending and selecting accommodation. SAA is implementing a National Property Accreditation Scheme (NPAS) for providers of accommodation offered for the exclusive use of students, which Expert Members have now reviewed. They considered whether the proposed NPAS will meet the objectives of accommodation standards, and have recommended its endorsement by states and territories, which are responsible for regulating student accommodation. Throughout 2019, SAA has been consulting industry on the proposed accreditation standards.

Student mental health

Alongside the challenges of study, the stresses of adjusting to life in another country and separation from family and other support can affect the mental health of international students. English Australia has reported that in a 2017 survey on mental health issues of over 95 English Language Teaching (ELT) colleges, nearly 40 per cent reported speaking with students who had suicidal thoughts and were not equipped with resources to support student mental health.⁹

Recent events and media attention have highlighted how international students may be prone to a number of vulnerabilities, including lower English language ability, which may precipitate or exacerbate mental health issues, social and cultural isolation, financial stress and study pressure.

Current literature suggests international students may face significant obstacles to accessing support and services that support positive mental health. The known reasons for this include greater stigma around seeking help from mental health professionals, lack of awareness of available services, a lack of cultural appropriateness of professional advice and greater out of pocket cost of accessing mental health support.¹⁰

Following the 2019 release of the Victorian Coroner's report into the 2016 suicide of an international student, the Minister for Education agreed to the Coroner's recommendation to undertake consultations on international student mental health. The consultations commenced in the second half of 2019 and include discussions with students, peak bodies, educational institutions and relevant community groups. This will inform the sector's further development of best practice and strategies to support the health and safety of international students.

Physical safety of students

International students rank safety as one of the top five reasons to study in Australia. Importantly, physical safety is a basic need and expectation, and failure to provide this could rapidly erode Australia's good reputation as a study destination. The Australian Government is committed to keeping students safe, and after a number of international students were attacked in Melbourne, physical safety has been included as a

⁹ English Australia, *Guide to Best Practice in International Student Mental Health 2018*: <https://www.englishaustralia.com.au/documents/item/493>; Sophie O'Keefe, *Best Practice in International Student Mental Health*: <https://learningandteaching-navitas.com/best-practice-international-student-mental-health/>

¹⁰ English Australia, *Guide to Best Practice in International Student Mental Health 2018*; Helen Forbes Mewett and Anne Maree Sawyer, 'International Students and Mental Health', *Journal of International Students* vol. 6, issue 3 (2016), pp 661-677.

discussion issue within the consultations on student mental health. While the physical safety of international students remains an ongoing challenge, improvements in this area will benefit all of Australian society.

Preventing workplace exploitation of students

The employment of international students while in Australia can benefit both students and Australian businesses, but students can be vulnerable to exploitation if they do not understand their rights and entitlements under the law. Workplace exploitation can be detrimental to students' physical and mental wellbeing, and undermine their experience in the classroom.

Then Australian Government released the report of the Migrant Workers' Taskforce (the Taskforce) on 7 March 2019. The Taskforce, chaired by Professor Allan Fels AO and Dr David Cousins AM made 22 recommendations aimed at improving workplace protections for vulnerable migrant workers, including international students.

The Government has accepted in principle all 22 recommendations, and announced additional funding to the Fair Work Ombudsman in the 2019–20 Budget to bolster enforcement action against employers who exploit vulnerable workers. Funding will also be provided to enhance resources to ensure vulnerable workers are aware of their workplace rights.

In line with the Taskforce recommendations, and following the release of a package of actions to address international student exploitation released by the Council in 2018, Ernst & Young was commissioned under the 2018–2019 EGI Program to develop and disseminate information and best practice advice for international students, education providers and education agents on preventing student workplace exploitation.

The materials, available in late 2019 in a range of media, focus on early intervention and redress and have been informed by stakeholders including international students' support and advocacy organisations. They have been designed in close consultation with the Fair Work Ombudsman to help prevent student workplace exploitation and support students to access legal services and report cases of exploitation to the Fair Work Ombudsman. The materials include a toolkit to guide agents and providers in delivering resources to students at the right points in their education journey and will also be made available on the *Study In Australia* website.

Countering foreign interference in Australia's universities

Australia's universities are deeply engaged internationally, sharing and developing knowledge through collaboration with experts from across the world. This collaboration underpins the generation of world leading research but also means Australia's universities can be at risk of foreign interference. The cyber hack on the Australian National University in 2018 was a stark reminder of this risk.

To ensure the sector continues to be an attractive education and research partner in an environment of unprecedented threat, the Australian Government established a taskforce in 2019 to develop best practice guidelines to deepen resilience to foreign interference.

The University Foreign Interference Taskforce, comprised of both Australian Government and higher education sector members, consulted widely in the development of the guidelines, focusing on the four key strategic areas of foreign collaboration, research and intellectual property, culture and communication and cyber security. Through joint sector-government working groups, a written submission process and a series of face-to-face consultations, the taskforce developed guidelines that outline practical, risk-based approaches to countering foreign interference, while protecting the central tenet of university autonomy.

In 2020, government and the sector will continue to work together to progress efforts to counter foreign interference. Universities Australia will call for best practice examples of existing or new processes that have been introduced as a result of the guidelines for broad dissemination across the sector. At the same time, government agencies will progress work improving responsiveness to sector requests for advice and intelligence.

The Taskforce will reconvene in 2020 to consider best practice examples, and how government can assist the sector with more timely, practical and targeted advice.

Improving the transparency and standards of practice by education agents

Around three-quarters of international students who come to study in Australia are assisted by education agents, who influence the impressions, expectations and experience of these students. The existing Education Services for Overseas Students (ESOS) legislative framework holds providers responsible for the actions of their education agents. To help education providers work with high-performing education agents, the Minister for Education committed to share data on enrolment and visa outcomes of overseas students recruited by education agents. In October 2019, the Minister released a report drawing connections between agents and trends in enrolments and student outcomes, such as visa refusals and study completion rates to help providers make informed decisions about the agents they engage. The Minister also released new visual analytics tools to give providers a more in-depth understanding of the enrolment and visa outcomes of students recruited by their own agents against comparable benchmarks, and support the sector to identify and address the small number of poorly performing agents. The Australian Government is working towards further release of education agent data. Transparency around student outcomes for enrolment and visa outcomes of students recruited by agents will facilitate improved decision-making by providers, agents and students and incentivise providers and agents to work towards better student outcomes.

In February 2019, the Joint Standing Committee on Migration reported on the efficacy of current regulation of Australian migration agents, and four of its ten recommendations suggested ways to improve the management of education agents. These include establishing a register of education agents, requiring agents to undertake education and training, and monitoring education agent compliance with Australian law. The Australian Government is currently considering the recommendations of the report.

Maintaining confidence in Australia's admission standards

Admission standards support confidence in the quality and prestige of Australian education and training. Concerns about the English language standards of international students, and their impact on both international and domestic students, were raised in the media during 2019. While the Tertiary Education and Quality Standards Authority (TEQSA) advised there was no evidence of a systemic problem with English language standards, and that existing compliance frameworks could respond to any pockets of poor performance, it is important such concerns do not diminish the reputation of international education in Australia. Changes to the *English Language Intensive Courses for Overseas Students (ELICOS) Standards 2018* further strengthened the ELICOS sector by raising the already high minimum standards of English language instruction. To ensure compliance activities to uphold admission standards are appropriate and effective, in August 2019 the Minister for Education asked TEQSA to provide comprehensive guidance to the higher education sector on English language requirements and to pay particular attention to compliance with English language requirements in its monitoring activities. The Australian Government will continue to identify and act on emerging trends, risks and issues in the international education sector through collaboration between the Department of Education, the Department of Home Affairs and education regulators, the Australian Skills Quality Authority (ASQA) and TEQSA.

Strengthening students' employability through Work Integrated Learning

Employability is an area of focus for the sector. The ability of students to gain meaningful work while studying and after graduation is a key factor in Australia's attractiveness. Work Integrated Learning (WIL) allows students to combine their study with relevant work, building their skills and post-study employability. Universities Australia, supported by the EGI program, has completed an audit of WIL opportunities for international students. As well as collecting and collating data about existing opportunities by area of study, level of study, location (metropolitan or regional) and comparison to domestic student uptake, the audit provided insight into areas for improvement in the delivery of WIL to international students. This included effective communication methods, better promotion of WIL and its benefits, assistance with résumé development, providing students with an overview of Australian workplace norms, and suggesting that citizenship-based restrictions to participating in WIL be removed. Next steps include dissemination and piloting of resources and online modules to support international students' participation in WIL (developed by the Australian Technology Network with funding through EGI), discussions with relevant agencies on how WIL arrangements fit within existing visa conditions for international students' permitted work hours, and the development of an International Student Engagement Strategy for WIL.

Strengthening the regulatory framework

Australia's strong and targeted regulatory framework underpins the quality and reliability of our education system, and it must be kept focused and up-to-date. Building on revisions to the standards under the ESOS framework in the National Code of Practice for Providers of Education and Training to Overseas Students 2018 (National Code 2018) and ELICOS Standards 2018, the Education Services for Overseas Students Regulations 2019 (ESOS Regulations 2019) were remade to commence from 1 October 2019. The updated ESOS Regulations 2019 maintain the quality delivery of education to overseas students by helping providers to comply with the ESOS legislative framework and ensure the currency and accuracy of data collected in the department's Provider Registration and International Student Management System (PRISMS). The ESOS Regulations 2019 increase the transparency and availability of information on student English language skills and information on education agents which will assist education regulators to monitor education providers and take action where they do not meet the expected standards.

Visa settings

To support Australia's international education sector, it is important the government maintains internationally competitive visa settings and high levels of immigration integrity. From local and global experience, we know international student flows are closely linked to changes to residency and work rights. Australia's international education sector grew by 11 per cent per year (2013–2017) following changes such as the expansion of post-study work rights (2013) and the introduction of the Simplified Student Visa Framework (2016). Likewise, recent rapid growth of 20 per cent by key competitor Canada is attributed to its favourable visa settings. In an attempt to boost growth in the higher education sector, in September 2019, the United Kingdom announced it would reintroduce two-year post-study work opportunities for international student graduates, after they were removed in 2012. There is also a current decline in the United States' market, attributed in part to the introduction of more difficult migration settings.

Through the announcement to provide an extra one to two years of post-study work rights on the Temporary Graduate (subclass 485) visa from 2021, the Australian Government is encouraging international students to enrol in regional higher education institutions, and to stay in regional Australia for longer. This is discussed in the section 'Growing International Education in Regional Australia'.

3.3. Competing globally

Competitive pressure is growing, both from countries similar to Australia (United States, United Kingdom, New Zealand, Canada) and in some cases from our traditional student source countries, such as China, which are increasingly able to meet their own education needs and attract students from abroad. Likewise, geopolitical events far beyond our influence can have a major impact on the ability of students to study here.

Diversification is at the heart of Australia's market growth agenda in terms of student profile (source market and course type), study location and delivery models. The international education sector has a variety of strengths and needs that must be considered when developing these strategies; the multiple conditions providers operate in mean there is no single solution. At the core of Australia's global competitiveness is our reputation for providing a positive student experience.

Growing International Education in Regional Australia consultation

With the majority of international students choosing to study in Sydney, Melbourne and Brisbane, there is significant potential to diversify international education across regional locations within Australia. Diversifying the range of study destinations means different options and experiences for students and that the benefits of the international education sector can be shared more widely. Not only can more local communities gain from closer integration to the international flow of students and research, foreign partners can tap into the particular expertise Australia's regional institutions have developed.

Expert Members sought input on the most effective strategies to pursue this, seeking written submissions on the consultation paper *Growing International Education in Regional Australia* in 2018, followed by a series of targeted roundtable discussions in regional education destinations in February and March 2019. Roundtables were held in Canberra, Geelong, Warrnambool, Perth, Newcastle, Cairns, Armidale and Adelaide, where stakeholders from the Northern Territory and Tasmania participated. Minister Tehan opened and participated in the first roundtable consultation held in Warrnambool. The consultation paper received 59 written submissions.



Image 6: The Hon Phil Honeywood, Convener of the Expert Members of the Council for International Education, and the Hon Dan Tehan MP, Minister for Education and Chair of the Council for International Education, meet with an international student at the stakeholder consultation in Warrnambool.

Expert Members delivered their formal advice in March, and the Government responded in April 2019, with support for most recommendations. Recommendations relating to issues such as consistent branding and promotion of regional destinations and the establishment and coordination of better services and support for international students in regional areas will proceed across a range of projects and activities. A major initiative was announced on 20 March 2019 in advance of the complete government response, as part of the government's new population policy – an additional one to two years of post-study work rights will be available to eligible international students who graduate with a higher education or postgraduate qualification in a regional area from 2021. This additional period, which will require ongoing residence in a regional area, will support diversification by encouraging international students to study and stay in regional Australia for longer.

Austrade continues to roll-out social media campaigns to encourage students to consider study outside of Australia's major capitals and to experience the diversity that Australia has to offer in more than 30 study destinations.

Destination Australia Program

In August 2019, the Minister for Education announced new tertiary scholarships to attract Australian and international students to study in regional Australia. The \$93.7 million Destination Australia Program offers scholarships valued at \$15,000 per student, per year, to domestic and international students who live and study in regional Australia. They are available for students undertaking education at levels from Certificate IV through to PhD. Tertiary education providers, including those from the VET and higher education sectors, applied for funding through a competitive grants process to administer and promote scholarships, with 1,200 scholarships worth \$19.5 million announced on 31 October 2019. Scholarships will start from semester one 2020.

The Australian Government will continue to support current Endeavour program cohorts (2014–19) until scholars have finished their programs.



Image 7: Destination Australia promotional material.

Supporting diversification into growth areas

Remaining responsive to new opportunities in education, training and research not only supports the growth of the sector, it will ultimately strengthen the Australian economy and lead to mutually beneficial outcomes in partner countries through high quality graduates and stronger research networks. To support diversification into potential growth areas, Market Action Plans have been developed for Indonesia and Vietnam, with Mexico and India in development. 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.

The Market Action Plan for India is being developed in the context of the recommendations of the India Reference Group and is due in early 2020. In line with the *Australian International Education 2025* long-term market development roadmap for international education, Austrade will continue to pursue opportunities to support diversification of student markets and service offerings.



Image 8: Market Action Plans for Vietnam, Indonesia, Mexico (in development) and India (in development).

Transnational education

Transnational education – education delivered somewhere other than the country in which the home institution is based – represents a major opportunity for sector diversification. The delivery of education accredited to Australian standards to students in their home or other countries through offshore or online delivery takes advantage of emergent technology and the formal links Australia is building with foreign governments. In 2019, the Department of Education began work on an Australian Transnational Education Strategy, informed by The University of Melbourne’s research funded through the 2019 EGI program: *Trends, barriers and opportunities for Australia’s higher education delivery offshore*. They are preparing recommendations for Australian higher education providers seeking to develop and expand their offshore and online delivery, based on a comparison of Australia and key competitors’ performance, the identification of markets with growth potential and barriers to entry and growth. The Transnational Education Strategy will be developed further in 2020, and will support growth in offshore and online delivery across all education sectors.

In 2019, Austrade released the report *Transnational education: knowing our competitors*, providing insights from its global network on barriers and opportunities in Australia’s top transnational markets including China, India, Indonesia, Malaysia and Singapore.

As noted in the sector health check, Australia surveyed offshore higher education students for the first time in 2018, providing useful insights into their satisfaction with offshore delivery by Australian institutions and the reasons they chose, and may recommend, their course of study and institution.

The *APEC Quality Assurance in Online Education* project is also working in partnership with APEC members to reduce barriers to online delivery and recognition of transnational education in the Asia-Pacific.

Korea is set to undertake a pilot of the Australian Government's IST courses in January 2020. These courses are another quality Australian education product offered by licensed Australian registered training organisations (RTOs). IST provides tailored skills training services to students in international markets, with courses developed in partnership with industry and the training sector for delivery offshore.

There have been significant developments in Indonesia's education sector, such as the signing of the Indonesia-Australia Comprehensive Economic Partnership Agreement (IA-CEPA) on 4 March 2019, which includes outcomes for VET and higher education and finalisation of *Ministerial Regulation 53 of 2018* that allows foreign higher education institutions to establish campuses in Indonesia. The department worked closely with Indonesia's Ministry of Research, Technology and Higher Education (RISTEK DIKTI) as it developed its *Ministerial Regulation 53 of 2018*.

IA-CEPA recognises the importance of human capacity development for Indonesia to ensure sustainable economic growth. Once ratified, it will allow Australian VET providers to establish a presence in Indonesia without geographical and subject matter limitations. It also commits Indonesia to impose no further restrictions on Australian universities wanting to establish a campus in Indonesia when Indonesia opens its higher education sector to the world. Both countries are currently undertaking ratification processes.

Marketing coordination

The presentation of a strong and unified national education sector identity can maximise international recognition of Australia's diverse education offerings. Australia's Nation Brand will harmonise what the world sees, hears, knows and experiences of Australia, making everything Australian easily recognisable. It will capitalise on our known strengths and showcase our lesser known capabilities as we market ourselves to the world. It will enhance trust, build popularity and highlight the benefits of studying with Australian providers. In development throughout 2019, the Nation Brand will reinforce Australia's reputation as a quality provider of education.

Austrade is trialling new approaches to digital marketing to ensure the Australian education sector remains globally competitive. It led an International Education Digital Engagement Framework Scoping Study, which highlighted digital marketing, the digital journey and digital quality as three opportunities to improve the digital experience of prospective and current international students in Australia.

In response to the scoping study funded under the first round of EGI, a refresh of the *Study In Australia* website was launched in October and development of new digital marketing campaigns is underway. The India Digital Toolkit led by Austrade South Asia will enable Australian education institutions to understand the most efficient and effective pathways to engage India's education decision-makers through digital marketing.

The *Study In Australia* 2.0 Partnership Project is currently in a discovery phase, with Austrade working together with the Australian federal, state and territory governments to scope the potential for a new investment in a digital eco-system for international students, education agents and parents for every stage of the student journey.

4. Challenges and Opportunities

Although Australia's international education sector has recently enjoyed a period of high growth, there are a number of ongoing and emerging challenges that may undermine the future sustainability of the sector. However, these are balanced by a range of opportunities to diversify growth. These challenges and opportunities will underpin the 2020 refresh of the National Strategy.

Student experience

With Australia facing increasing competition in the global international education market as competitors develop sophisticated strategies and responsive policy settings, a sustainable international education sector needs to deliver quality education practices and services to students, ensure a satisfying and rewarding student experience, allow appropriate post-study employment opportunities, and continue to leverage our positive international reputation.

Australia has performed well as a preferred destination for mobile international students and is competitive with its main competitors (New Zealand, the United Kingdom, the United States and Canada) in all factors that influence students' choice of study destination.¹¹ In addition to the quality of courses and institutions, these include affordability and cost of living, and return on investment in terms of employment options. To maintain its status as a preferred destination, Australia needs to enhance the international student experience through course quality and admission standards, providing value for money regarding course fees, ensuring a safe and healthy living environment and accommodation, and offering competitive post-study work rights.

While students overwhelmingly report feeling safe in Australia, some recent cases of physical assault have been widely reported, including in international media. They can be vulnerable to becoming victims of crime, with fraud and extortion cases reported in the media, and are also exposed to vulnerabilities and obstacles that can undermine mental health, awareness of which has grown following the Victorian Coroner's investigation into the 2016 suicide of an international student.

Opportunities to enhance the student experience include collaboration between government and institutions to ensure international students are better equipped with pre-departure information that helps them prepare for life in Australia, and are appropriately supported to access services to support their physical and mental health once they are here studying. Providers would benefit from developing employability strategies to equip their graduates for the rapidly changing global workplace. Similarly, while action has been taken to prevent workplace exploitation of international students over recent years, ongoing vigilance is required to ensure employers adhere to the law.

The traditionally high levels of international student satisfaction with their experiences in Australia and the positive views of Australia reported by alumni, highlight the ongoing potential for Australia's global alumni to promote and advance Australia's interests. Ninety-seven per cent of Australia Awards Alumni survey respondents (both the 1996 to 2005 graduates¹² and the 2011 to 2016 graduates)¹³ became more positive about Australia as a country through their experience, and 73 per cent built networks with Australians or

¹¹ IDP, International Student Buyer Behaviour Research 2018: <https://www.idp.com/partners/news-article-12/>

¹² Australia Awards Global Tracer Facility, *Tracer Survey Report Year 2, 2018*. (Note: The Tracer Survey involved 1,072 alumni who completed scholarships as part of the Australia Awards or predecessor scholarship programs between 1996 and 2005).

¹³ Australia Awards Global Tracer Facility, *Tracer Survey Report Year 3, 2019*. (Note: The Tracer Survey involved alumni who completed Australia Awards scholarships between 2011 and 2016).

Australian organisations. Likewise, the outbound New Colombo Plan continues to develop strong institutional, business and people-to-people links.

Regulatory and governance arrangements

The continued growth and increasing complexity of the international education sector brings a suite of policy and regulatory challenges. As new business models and practices emerge, the regulatory environment needs to adapt, allowing stakeholders to grasp opportunities and respond positively to emerging trends. This needs to be carefully balanced with the need to maintain the sector's quality and integrity and its ongoing viability as a significant element of Australia's export-driven economy.

English language standards were under significant public scrutiny in 2019. While the higher education regulator, TEQSA, has indicated that there is no evidence to demonstrate a systemic problem, anecdotes of poor practice and low standards continue to surface. An evidence-based discussion is needed within the sector to clarify the extent and specific location of any problems. The Minister for Education has written to all higher education providers and TEQSA, calling on them to collectively ensure that appropriate standards are met. Failure of the sector to meet these standards risks diminishing the Australian international education sector's international prestige and domestic social license.

The ASQA strategic review into international education, *Protecting the quality of international VET and English language education*, found that while international students have good experiences studying in Australia, the sector must not be complacent. One issue is the failure of certain VET providers to ensure their students participate in a minimum of 20 contact hours per week. The report also recommended legislative tightening to make it explicit that international students are required to attend courses on a full-time basis and strengthening collaboration across agencies to ensure consistent access to data and intelligence.

Provider closures and defaults continue to occur, some due to business failure and some due to regulatory action. While Australia should set and maintain high standards for education and training of international students, closures have the potential to erode Australia's good reputation. All stakeholders must work closely to ensure when closures do happen, affected students are well-informed, supported and protected as far as possible, noting the stress caused to students in these circumstances. The Tuition Protection Service (TPS) continues to support students impacted by closures who were otherwise not supported by their provider. The TPS is being expanded in 2020 to cover two cohorts of Commonwealth supported domestic students, reflecting the strength of its support for international students, and the effectiveness of the industry-funded levy model.

Education agents play an increasingly important role within the international education sector, involved in approximately 75 per cent of overseas student enrolments in 2018. They are valuable partners for providers offering services to international students, and in many cases are the first point of contact a potential student has with the Australian education system. Providers are responsible for ensuring education agents act ethically, honestly and in the best interest of international students, and uphold the reputation of Australia's international education sector.

Diversification

For Australia to remain competitive and grow its share of the global education market, diversification needs to continue, supported by transformative partnerships and effective global marketing and promotion. While looking to develop new markets, we must ensure we continue to attract genuine students and maintain high levels of immigration integrity. Australia's education system is admired world-wide for its quality, and there is still unmet demand for our expertise in education system development, particularly within the Indo-Pacific

region and, increasingly, in Latin America. A refresh of the National Strategy will help ensure Australia can confidently respond to this demand and increase our global influence.

The majority of international students study in Sydney and Melbourne and more than half of the total number of international students come from just five countries, with 28 per cent from China and 15 per cent from India. These nations are also among the largest sources for our major competitors, with China's own rapidly evolving higher education system increasingly attractive to its domestic students and those from abroad, including countries participating in its ambitious Belt and Road Initiative. The ever-changing geopolitical context means that despite our world-class international education sector, unfolding events in source or destination countries can quickly influence student flows. Over-reliance on a small number of markets is a risk should those markets decline, and there is evidence that demand from China is starting to soften.

This lack of diversification can affect community perceptions around the uneven distribution of impacts and benefits from international education and raise concerns about the capacity of services and infrastructure to support further growth. While anecdotal reports about the impact of international students on the domestic student experience and the broader community are not currently supported by any reliable data, such perceptions may undermine domestic support for international education more broadly. The Council will continue to draw on evidence to build and preserve the sector's social license.

Recent work on *Growing International Education in Regional Australia* has identified opportunities to distribute international education more widely across the country, which can improve student experiences and spread the benefits of international education to regions that are keen to welcome international students.

There are significant opportunities to attract more students from Latin America, South Asia and Southeast Asia, where demand for education and skills is growing rapidly. Argentina, Colombia and Chile are ranked in the top 15 fastest growing source countries, and while enrolments in Australia from countries in the Latin American region have been predominantly in the VET and English language sectors, higher education engagement could be expanded, particularly at the postgraduate level. Australia's competitors have also recognised the significant potential of the region. The United Kingdom's *International Education Strategy: global potential, global growth*, for example, identifies Latin America as a high value region. This reflects factors including growing middle classes, the drive to enhance quality of education and the diversification of economies towards skills, knowledge and services.

As Brexit proceeds, there may also be an opportunity to attract more tertiary students from continental Europe, such as Spain, Italy and France, which are all in Australia's top 25 source markets. However, these students may be attracted by the United Kingdom's announcement that it plans to reintroduce two-year post-study work visas for international students; potential students from South Asia are also likely to view this possible change favourably. With competitor countries continually adjusting their policy settings, sustained engagement with priority partner countries in South Asia and Europe can help to broaden our market base. Australia's visa settings in the international sector need to remain competitive.

Transnational education is an area of great opportunity for Australian providers across all sectors. Increasing transnational education delivery, including online, can also diversify international education and support sustainable growth, across accredited and non-accredited courses and at different qualification levels. This will need to be supported by ongoing government-to-government work to reduce trade barriers, such as regulatory barriers to establishing offshore campuses and repatriating profits, and to ensure that Australian qualifications delivered through new models are fully recognised internationally.

5. Delivering the National Strategy – Next Steps

To achieve the goals of the National Strategy by 2025, the Council’s Expert Members have developed a work plan that builds on the foundation laid down in the first four years of its implementation, and targets gaps in effort or achievement so far. The plan is at [Attachment A](#), and it provides a map of the work planned for 2020. It describes actions the Expert Members, the sector more broadly, the sector and government together, and governments, will pursue to implement the National Strategy. A major activity for early 2020 will be the refresh of the National Strategy. The key activities outlined below will happen in the context of the refresh.

Strengthening the fundamentals

To build on Australia’s world-class education, training and research system (Goal 1), the government and sector will continue to work together on data collection and analysis, sharing, and communication.

To provide a positive student experience (Goal 2), in the short term, government and the sector will focus on supporting student mental health and accommodation. The sector and government will also further develop opportunities for WIL and work together to address workplace exploitation.

To achieve effective quality assurance and regulation (Goal 3), the government will continue to update and refine regulatory frameworks and increase transparency of education agents’ performance, and Expert Members will encourage the sector to undertake training on the National Code.

Making transformative partnerships

There are two activities designed to strengthen domestic partnerships. Expert Members will pursue ongoing work to better understand, with a view to more effectively leveraging, links between international students and inbound tourism and promote the benefits of employing international graduates (Goal 4). The sector will also engage with the government’s Global Talent Programs to harness international talent to work in emerging high-tech industries.

To strengthen international partnerships (Goal 5), government and the sector will implement the recommendations from the report of the China Working Group, designed to position Australia as one of China’s education, training and research partners of choice. The Australian Government will expand bilateral engagement with key partners, build confidence and trust in Australian online learning and qualifications in Asia and Latin America, implement the recommendations of the Latin America Working Group report, and work to address trade barriers to delivery of education services in ASEAN nations.

Government and the sector will also increase research collaboration with India. This includes implementing the recommendations of the India Reference Group, which focus on building strength and cohesion in Australia’s education branding, enhancing student and academic mobility, increasing research collaboration and enhancing opportunities in the VET sector.

To enhance mobility (Goal 6), the government will begin the ratification process for the UNESCO Global Convention on Higher Education Qualifications. Through the New Colombo Plan the government will continue to encourage the two-way flow of students in the Indo-Pacific and will introduce an additional 1–2 years of post-study work rights for eligible Temporary Graduate (subclass 485) visa holders.

To build lasting connections with alumni (Goal 7), government will improve alumni outreach through digital engagement. This will be used to inform the longer term development of an alumni community of practice.

Competing Globally

To promote Australia's education excellence (Goal 8), government and the sector will integrate information needed by international students into the Study In Australia website, as the definitive information source at all stages of study. Expert Members will support a comparative analysis of the costs of living and studying and employment outcomes in Australia. Government and the sector will work together to apply the Nation Brand to education.

To embrace opportunities to grow international education (Goal 9), the government will finalise the sector strategy for schools. Expert Members and the Government will seek to enable effective partnerships between Australian registered training organisations and Australian companies operating offshore to deliver workforce skills training. IST courses will continue to expand.

The Australian Government and Expert Members will continue to work with the sector to promote study opportunities in regional Australia, including the Destination Australia Program. The Australian Government and providers will work together to rollout scholarships to students for semester one in 2020, and refine the delivery of the program in future years.

The Australian Government will evaluate the Market Action Plan process to consider how future models can best build engagement with partners and enhance market development activities across governments. It will also work with the sector to develop and deliver a transnational education strategy to grow enrolments in Australian courses delivered offshore and online.

Attachment A: 2020 work plan

Goal 1: Building on a world-class education, training and research system.	
2020	Beyond
Action 1.1: Developing Australia's role as a global leader in education, training and research	
Government and sector to enhance sector data collection, sharing, analysis, distribution and communication to ensure Australian international education sector remains a global leader.	Expert Members to identify, and encourage the adoption of, best practice across the sector to support the continued development of a diverse, flexible and innovative education and training system.
Action 1.2: Setting nationally consistent approaches that support the Australian international education sector	
Government and Expert Members to consult with institutions, peak bodies, states and territories, and students on current and emerging issues to encourage the sharing of ideas and intelligence to align activities and ensure consistent policy settings.	
Government and Expert Members to consult with the sector on a refresh of the National Strategy for International Education 2025 in 2020.	
Goal 2: Delivering on the best possible student experience.	
2020	Beyond
Action 2.1: Supporting students	
Government to consult with students and sector to identify best practice mental health service provision for international students. Expert Members to support the adoption of best practice, by the sector, and evaluate the impacts.	The sector to continue to share information and best practice in relation to international student mental health and drive improvements.
States and territories to endorse and implement the National Property Accreditation Scheme (NPAS) to ensure providers deliver better information and offer quality accommodation to students.	Study In Australia website to include an accommodation section that reflects NPAS standards.
Expert Members to deliver on the package of actions to address workplace exploitation by providing a range of information products for students, providers and agents. Sector to disseminate to students. <i>This is supported by the Enabling Growth and Innovation (EGI) program, which has funded a project to create information materials on workplace exploitation</i>	Expert Members and Government to disseminate to the sector communication materials and promote best practice guidelines. Government to publish products on Study In Australia website to help prevent student exploitation.
Action 2.2: Informing student choice	
Austrade to continue working with federal, state and territory governments on a co-investment model for the Study in Australia website to support students through all stages of their study journey.	Study In Australia website continues to evolve to meet the needs of students, providers, agents and other stakeholders

<p>Expert Members to disseminate recommendations from the project on the provision of pre-departure information to providers, agents and study clusters.</p> <p><i>This is supported by the EGI program, which has funded a project to document student perspectives on pre-departure information.</i></p>	<p>Sector to action recommendations of the EGI-funded project to better deliver pre-departure information.</p>
	<p>Expert Members to facilitate a community of practice of providers, study clusters and local governments to collect examples, and support implementation, of best practices in coordinated student service delivery.</p>

Goal 3: Providing effective quality assurance and regulation.	
2020	Beyond
Action 3.1: Maintaining strong quality assurance systems	
<p>Government to run webinars demonstrating the PRISMS Agency Dashboard, a suite of visual analytics tools for education providers on their education agency data.</p>	<p>Expert Members to engage with the sector to identify best practice models for engaging with agent data to refine business practices and enhance student experience.</p>
<p>Government to continue to increase transparency of international education agents' performance data to inform provider and student choice.</p>	
Action 3.2: Ensuring strong student protection	
<p>Sector to ensure teachers/trainers of international students, and recruitment staff, undertake online training for National Code of Practice for Providers of Education and Training to Overseas Students 2018 (National Code).</p> <p><i>This work to be supported by the EGI program, which has funded a project to develop an instruction tool for education professionals on their obligations under the National Code.</i></p>	<p>Government to continue working with the sector to lead an integrated program of regulatory review.</p> <p>This will inform a review of the <i>Education Services for Overseas Students (ESOS) Act 2000</i>.</p>

Goal 4: Strengthening partnerships at home.	
2020	Beyond
Action 4.1: Engaging with the broader community	
Expert Members to engage the broader community about Australia's high-quality international education sector.	Government, Expert Members and the sector have positive, evidence-based messaging to build the social licence for international education in Australia.
Austrade to work with federal, state and territory governments to develop the next Tourism/Visitor economy strategy to acknowledge contribution of international education and reflect needs of education visitors (including international students).	All levels of government and sector to implement the Tourism/visitor economy strategy.
Action 4.2: Encouraging better links with business and industry	
Sector to engage with the Government's Global Talent Programs to build Australian industries' capabilities in fields such as quantum engineering, artificial intelligence, agtech and fintech.	
Expert Members and the sector to engage with industry bodies on the benefits of employing international graduates and on post-study work visa settings. <i>This is supported by the EGI program, which has funded a project to engage with employers on the benefits of employing international graduates.</i>	Expert Members to increase speaking engagements at industry conferences, with highly-specific tailored messages to better facilitate connections between industry and education/research.

Goal 5: Strengthening partnerships abroad	
2020	Beyond
Action 5.1: Building confidence through government-to-government engagement	
Government to lead the education agenda in, and to work collaboratively with, ASEAN to support development of regional education systems and deliver opportunities for Australian providers.	
Government and sector to implement recommendations from the China Working Group's report; subject to Ministerial consideration.	Australian Government, state and territory governments and the sector to progress recommendations to support a closer sustainable relationship and secure Australia's position as one of China's education, training and research partners of choice.
Government and the sector to implement recommendations from the India Reference Group's report, subject to ministerial consideration to further develop Australia's engagement in India by delivering on the 15 priority actions in the report.	
Government to work with APEC member economies to build confidence and trust in Australian online degrees in Asia and Latin America.	
Government to develop a Mexico Market Action Plan to establish a framework for greater collaboration between government and the sector to increase opportunities for Australian providers in the Mexico education market.	Sector to implement actions under the Plan. Implementation of actions under the Plan will be supported by seed funding initiatives.

Government and the sector to monitor implementation of identified actions from the Latin America Working Group's report *An Educated Choice*, outlined in their respective work plans, to position Australia as a valued education, training and research partner for key countries in Latin America.

Action 5.2: Strengthening collaboration through institution-to-institution partnerships

Government to facilitate an enabling environment through bi- and multilateral government engagement, and through work such as the Foreign Interference Guidelines to support Australian providers to collaborate with institutions offshore.

Sector to identify and action opportunities for growing institution-to-institution collaboration.

Goal 6: Enhancing mobility

2020

Beyond

Action 6.1: Supporting international mobility through competitive visa settings and work arrangements

Government to introduce an additional 1-2 years of post-study work rights for eligible Temporary Graduate (subclass 485) visa holders. The second visa will require ongoing residence in a regional area.

Action 6.2: Expanding student, education and training professional and researcher mobility

Government to encourage a two-way flow of students between Australia and the Indo-Pacific region through the New Colombo Plan.

Action 6.3: Supporting graduates through qualifications recognition

Government to begin the process for ratification of the *UNESCO Global Convention on Higher Education Qualifications*.

Government to support implementation of the Global Convention.

Government to share Australian best principles and practices in qualifications recognition with international education partners, including engagement with multilateral qualifications conventions.

Goal 7: Building lasting connections with alumni

2020

Beyond

Action 7.1: Engaging alumni

Government to facilitate alumni outreach through digital engagement, to collect and curate a library of digital profiles and to resource a community of practice for alumni engagement practitioners.

Goal 8: Promoting our excellence.	
2020	Beyond
Action 8.1: Promoting Australia as a high-quality international education provider	
Government and industry to work together to apply the Nation Brand to education, working to develop new approaches for international events, digital platforms and campaigns, and market-specific strategies.	All levels of government and the sector to work together, to develop a single senior school certificate brand to complement individual state and territory certificates.
Government to integrate information needed by students through Study In Australia: creating a single definitive source of information for international students at all stages of study.	Expert Members to identify, and work with, study destinations that are likely to experience growth and increased interest in international education, ensure community buy-in, increase brand value, and position Australian education across key markets.
Expert Members to support a comparative analysis of the cost of studying and living, and employment outcomes, in Australian cities compared to competitor cities abroad. <i>Some of this work will be supported by the EGI program to develop a “liveability index” of key international education markets and research on return on investment of studying in Australia.</i>	The sector to continue to innovate and improve to ensure Australia remains a value-for-money proposition for international students.

Goal 9: Embracing opportunities to grow international education	
2020	Beyond
Action 9.1: Building on innovative education and training services to meet student and employer needs	
Government to finalise and release strategies to drive further international engagement in the VET, ELICOS, Transnational Education and Schools sectors.	Government and sector to implement strategies.
Government to finalise response to the Australian Quality Framework (AQF) review	Expert Members to promote information about the provision of short courses to enhance employability skills and expand course offerings for international students, in line with the AQF Review.
Expert Members and Government to enable effective partnership models between Australian registered training organisations (RTOs) and Australian companies operating offshore to deliver workforce skills training. <i>This work is supported by the EGI program, which has funded a project to investigate effective partnership models between Australian RTOs and multinationals operating offshore.</i>	Expert Members and Government to support sector to implement best practice for establishing and maintaining successful provider-industry international partnerships.
Industry Skills Training courses to continue to expand.	

Action 9.2: Promoting opportunities in regional Australia	
<p>Government, Expert Members and sector to promote study opportunities in regional Australia, including through the Destination Australia Program, post-study work rights and new digital campaigns.</p> <p><i>This work is supported by the EGI program, which has funded a project to undertake research on growing the number of international students in regional areas.</i></p>	<p>Expert Members to analyse and advise on what study incentives are driving enrolments and influencing levels of student satisfaction, enrolment levels and employability in target study destinations.</p>
Action 9.3: Identifying and responding to new opportunities	
<p>Government to evaluate the Market Action Plan (MAP) process to consider future models to build engagement with partners and enhance market development activities across governments.</p>	
<p>Government to work with sector to develop and deliver a transnational education strategy to grow enrolments in Australian courses delivered offshore and online.</p>	<p>Sector to work to develop innovative new models for delivery of transnational education, including online and blended approaches for international markets.</p>

Attachment B: Enabling Growth and Innovation Projects

2018–19 Projects

Organisation	Project Title and Description
Council priority: Growing international education in regional Australia	
Australian Council for Educational Research (ACER)	<p><i>International students studying in regional areas</i></p> <p>An investigation of existing regional international education, pull factors for students, relationships to metropolitan and overseas institutions and courses, pathway opportunities and conversion rates of non-award courses into formal qualification enrolments in regional and metropolitan locations.</p>
Council priority: Providing the best possible student experience	
Ernst & Young	<p><i>Addressing workplace exploitation of international students</i></p> <p>Development and dissemination of information for students, best practice advice for providers and training material for education agents, providing clear advice on Australian workplace rights and conditions, how to prevent workplace exploitation, and avenues for advice and support should it occur.</p>
Nous Group	<p><i>Positioning Australia to remain an attractive study destination for international students</i></p> <p>Research and analysis of studying and living in key international education markets, with a view to developing a “liveability index”, plus research on the return on investment of studying in Australia, including a comparative analysis of employment outcomes of key international markets. The findings will point to how Australia can sustain or improve on its ranking as the third most popular study destination for international students.</p>
Council priority: Expanding research collaboration between regional Australia and Southeast Asia	
PhillipsKPA	<p><i>Expanding research collaboration between regional Australia and Southeast Asia</i></p> <p>Positioning Australian and Southeast Asia researchers to develop productive linkages and reach agreement on mutually beneficial research collaboration.</p>
Council priority: Implementing the recommendations from the Latin America Working Group final report	
Australian Council for Education Research (ACER)	<p><i>Analysis of research strengths in the Latin American region</i></p> <p>Development of a user-friendly resource to identify top research institutions in the Latin America region in specific fields of research, using objective metrics such as the number of publications in peer-reviewed journals and citations.</p>

Australian Academy of Science (AAS)	<p><i>Building research collaboration with Latin America: Connecting Australian and Brazilian research expertise</i></p> <p>The Australian Academy of Science (AAS) will deliver a Research Collaboration Week in Australia for Australian and Brazilian researchers in late 2019.</p>
English Australia	<p><i>Latin America Implementation Reference Group</i></p> <p>Supporting a short-term Implementation Reference Group to coordinate sectoral responses to the 22 recommendations outlined in <i>An Educated Choice</i>, the final report by the Council for International Education Latin America Working Group.</p>
Swinburne University of Technology	<p><i>Researching Latin American education systems</i></p> <p>Developing a user-friendly resource on the education systems of three priority Latin American countries (Brazil, Mexico and Colombia), to inform Australia's education and training engagement with these countries.</p>
Council priority: Implementation of the VET International Engagement Strategy 2025	
Edified Pty Ltd	<p><i>Development of a VET International Messaging Framework</i></p> <p>The establishment of a VET strategic messaging framework that will provide a consistent approach to promotion and messaging of Australia's VET system and its international offerings.</p>
Wallis Market and Social Research	<p><i>Best practice international partnership models to help skill the global workforce</i></p> <p>Research to investigate effective partnership models between Australian registered training organisations (RTOs) and Australian and multinational companies operating offshore to deliver innovative bespoke training programs, plus a best practice guide providing guidelines for establishing and maintaining successful provider-industry international partnerships to deliver workforce skills training offshore.</p>
PriceWaterhouse Coopers	<p><i>Development of a VET Market Access Toolkit</i></p> <p>Investigation of the challenges and barriers Australian VET providers face in international markets and creation of a market access toolkit for Australian VET providers to build their understanding of the demand, opportunities and modes of entry in key international markets, using Indonesia and Vietnam as a pilot.</p>
Council priority: Activities identified through the schools deep dive	
IPS Management Consultants	<p><i>Opportunities for international engagement in regional Australian schools</i></p> <p>Investigating the appetite, capacity and options for growing international engagement in regional Australian schools and school systems.</p>
Monash University – Faculty of Education	<p><i>Supporting Australian schools to build international engagement</i></p> <p>Creating a single, accessible and user-friendly 'toolkit' to support schools to build their capacity for international engagement.</p>
The University of Melbourne	<p><i>Pathways to success in international education</i></p>

	Analysis of the academic outcomes of international pathways students compared with direct entry students and identification of good practice examples of providing positive student experience, supporting international students to achieve success, and promoting the strength and desirability of available education pathways.
Council Priority: Growing Transnational Education (TNE)	
The University of Melbourne	<p><i>Trends, barriers and opportunities for Australia's higher education delivery offshore</i></p> <p>Development of recommendations for Australian higher education providers seeking to develop and expand their offshore and online delivery, based on a comparison of Australia and key competitors' performance, the identification of markets with growth potential and barriers to entry and growth.</p>
Council priority: Baseline data to inform evidence-based policy decisions	
English Australia	<p><i>National Survey of ELICOS institutions in Australia in 2019 and 2020</i></p> <p>Annual survey of Australian ELICOS institutions offering English language courses to students holding student and a range of non-student visas (e.g. visitor, working holiday and other) in 2019 and 2020.</p> <p><i>International student survey 2020 (ELICOS sector)</i></p> <p>Collecting time series data on ELICOS students' satisfaction levels across living, learning and support environments, and benchmarking Australia's performance.</p>
The Nous Group	<p><i>Scoping of a unique identifier for education agent/agencies</i></p> <p>This project will develop a scoping paper into the governance and legal foundations for a unique identifier for international education agents and agencies.</p>
Council Priority: Enhancing bilateral relationships – China Working Group	
Austrade	<p><i>Australia-China Education Cooperation Events in China</i></p> <p>Events to demonstrate Australia's commitment to the bilateral education relationship with China, including Australia's School System Showcase, the Australia-China Quality Assurance Dialogues, and International Conference on Qualifications Recognition.</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 updated 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 (WIL)</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</p>

	to establish an industry-led governance, quality assurance and validation system for the Indonesian logistics sector.
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>
International Education Association of Australia (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>
NSW Education Standards Agency (NESA)	<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 markets. 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>
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 case studies; and the sharing of insights via a report and workshops.</p>

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 of International Students annual conference</i></p> <p>This project provides funding to support the ongoing sustainability of the conference and of the Council of 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>
International Education Association of Australia (IEAA)	<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>
English Australia	<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>
Tribal Group Pty Ltd, t/a i-graduate	<p><i>Onshore schools sector research</i></p> <p>The survey examines international secondary school students' living and study experiences in Australia.</p>
International Education Association of Australia (IEAA)	<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>
Tribal Group Pty Ltd, t/a i-graduate	<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>
ACER	<p><i>Graduate employment outcomes research</i></p>

	<p>This survey investigates the outcomes of international graduates who completed qualifications in Australia.</p>
Australian Survey Research Group	<p><i>International student spending survey research</i></p> <p>This project is a supplementary survey to inform the Australian Bureau of Statistics calculation of export income from international education.</p>
English Australia	<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 market 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 market 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>