



Australian Government

Australian Education International

AEI INTERNATIONAL EDUCATION BRIEFING

HOTEL REALM, CANBERRA, 4 MARCH 2011

SOUTH AND SOUTH EAST ASIA SESSION

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Scott Evans, Counsellor (Education) Bangkok, AEI

Introduction

I am the AEI Counsellor for Thailand and Philippines, based in Bangkok. I have been in Thailand since July 2010.

The focus of this presentation is Thailand.

AEI does not have a tradition of involvement in the Philippines, so it will take time to learn the lay of the land. Scott intends to traverse the current education landscape and major education reforms or initiatives underway, before canvassing some issues of specific interest to institutions, such as collaboration and regulatory issues.

Second Decade of Education Reform (2009-2012)

The cornerstone of the Thai Government's education policy agenda is the "Second Decade of Education Reform" policy document.

The first decade of education reform commenced in 1999 with the passage of the 1999 National Education Act. This first period is characterised by structural adjustment and consolidation of education administration and some funding arrangements. Key among these were:

- the consolidation of various Commissions (Higher Education, Basic Education, Vocational Education etc.) under one Minister and Ministry
- the creation of a national standards agency – the Office of National Education Standards and Quality Assessment (ONESQA).

The education reform framework of the second decade of reform is based on 4 pillars:

- quality education and development for young Thais
- quality development of a new generation of Thai teachers
- revitalisation of educational institutions and resources
- revitalisation of education administration and management.

Under these four pillars, eight policies have been formulated to push forward a second decade of education reform. Emphasis is given to the provision of quality education and manpower development as the key to national development and enhanced competitiveness.

Thailand aims to provide quality, student-centred, life-long learning opportunities. Clear indicators will be used to evaluate the performance of both teachers and learners.

The policy document on the second decade of education reform is quite a grand and aspirational document. Many countries in the South east Asia region set out similar long-term aspirational policy documents.

The big question is, what does this mean in practice? A major stated focus of the policy document is a focus on developing a modern and skilled labour force to meet the demands of a quickly modernising economy, especially with regard to the ASEAN Economic Community 2015 deadline.

Thailand sees itself as needing to do more to be ready for its people and its economy to take full advantage of ASEAN 2015.

The best way to explain the policy priorities is to provide information on the issues and projects around which AEI Bangkok is collaborating with the Thai Ministry of Education:

- The development of a national qualifications framework for Thailand covering all sectors will build on the work previously done in the higher education sector on a Thai Qualifications Framework for Higher Education (TQF:HEd).
- The TQF:HEd will form the core of the new Thai NQF.
- Some Australian institutions have been involved to date in the development of the TQF:HEd and I have recently contacted about eight Australian institutions with regard to the next phase of TQF:HEd implementation.

Higher Education (more broadly)

Current issues include:

- Risk Management in Thai Universities – working with La Trobe University.
 - There is soon to be risk management within the MOE to improve systems, processes and broader administration.
 - Working with La Trobe University (Carl Gibson), a major Thai alumni association and the MOE.
- Improving the status, and standing of Thai Universities and their international collaborations and research output.
- As part of the development and implementation of the National Qualifications Framework and the TQF:HEd, development of agreed teaching standards and learning outcomes will underpin the QA processes.
 - There is a great deal of interest in the processes through which Australian Universities develop and accredit their own new programs.
- The Thai government has nominated 9 universities to become the National Research Universities: Chulalongkorn, Mahidol, Kasetsart, Chiang Mai, Thammasat, Khon Kaen, Prince of Songkla, King Mongkut Thonburi Technology, and Suranaree Technology universities.
 - Research funding will go to other universities but the 9 National Research Universities will receive the lion's share of research funding.
 - The 9 are keenly looking for more international engagement to raise the profile and standard of their research output.

VET

Major aspects of the reform in the VET sector are very aspirational. They centre around the desire of the Thai MOE and the Government more broadly:

- to better link the VET sector supply with labour market demands
- to shift from a qualifications-based system to a competency based system
- to better link the development of standards and curriculum in the VET sector with industry, including direct industry involvement in this process.

There is quite an interest in the Thai MOE in our industry engagement, the Industry Skills Councils and their role in developing standards / Training Packages.

The Thai MOE is very interested in how Australia was able to get such comprehensive buy-in from industry without incentives – however, Thai industry is very willing to become involved in the system freely and willingly. They see the benefits of being involved in setting competency-based training standards.

The VET sector at the moment gives very basic training and industry is expected to provide the substantive training to 'job readiness' on the job – the focus is on how to improve the VET system so that graduates actually have skills and some experience valued by and relevant to industry.

There is a proposal for the establishment of a vocational qualifications institute to set a direction for the development of better quality and skills outcomes from the graduates entering the labour market.

Collaboration with Thai MOE on VET issues has basically ceased due to senior management changes in OVEC which saw a new manager come in with priorities other than international cooperation.

Schools

The principal reforms in the schools sector (Office of the basic Education Commission) are:

- Devolution of school management to the district level and below – getting local communities involved in running schools is delivering better quality and outcomes at the local level.
- Development of a series of public schools where the curriculum will be taught in both Thai and English, thereby creating a “bilingual” school system to better equip Thai students for the world economy.
 - Although literacy rates are around 96%, English language capacity in the general Thai population is actually quite low.
- Thai MOE has a target of attracting approximately 1000 TESOL teachers to work in Thai public primary and secondary schools within a year.

Regulatory issues

Due to the regulatory environment in Thailand, there is little capacity for Australian institutions to set up operations in Thailand in the same way that is the case in Singapore, Malaysia and in many parts of the Middle East, for example.

Partnerships with existing registered Thai education institutions are required and these are often effectively licensing or franchising arrangements.

The only Australian institution so branded and operating in Thailand is RMIT Worldwide.

This means that Thai institutions are therefore very keen to increase their general cooperation with Australian Universities. There is some cooperation at the moment (UTS Science, Melbourne / Nossal institute – Medicine, UQ – a range of areas), but of course it is dwarfed by the level of engagement in other countries like Malaysia, Singapore, India and China.

AEI is working closely with Austrade to raise the profile of Australian Research excellence in Thailand and the main initiative at the moment – the Visiting Researcher Program – will take place in Thailand June 2011.

A range of national research priorities (water resource management and clean and renewable energy and environmental law) have been identified - we have sought expressions of interest from Australian researchers / universities to participate in a seminar series that is intended to showcase Australian research and universities and to initiate or build institutional linkages in these areas.

Seminars will be jointly funded by Austrade and AEI as it is considered to be a soft marketing exercise as well as an opportunity to showcase research excellence.

If successful, this initiative will be repeated and other research priorities such as tropical medicine and agriculture.

Marie Grealy, Counsellor (Education) Jakarta, AEI

Indonesian education policy developments

In recent years there has been substantial efforts by Government of Indonesia to develop its education system in all sectors.

- Improving the quality and access to basic primary education has been at the forefront of Ministry of National Education's (MoNE's) priorities which has been substantially supported by the Australian Government through AusAID's country partnership program.
- However the development of the higher education sector which in Indonesia includes universities, polytechnics and academies – is also a high priority on MoNE's education reform agenda. In its National Education Strategy 2010-2014 the priorities for higher education are around providing better access and equity and quality improvements so institutions become internationally competitive and relevant to the needs of the nation and provinces. MoNE's program to create world class higher education institutions includes:
 - Improving teacher quality – Directorate General of Higher Education (DGHE) as well as some provincial governments are providing scholarships for lecturers to gain higher qualifications through overseas education. MoNE has set a number of targets to upgrade lecturers' qualifications. For example 85% of undergraduate lecturers have a minimum qualification of masters and 90% of post-graduate have a doctoral degree.
 - Internationalisation of universities. MoNE has provided block grants to targeted universities to set up international offices to facilitate exchange of international students, staff and research collaboration.
 - Improving quality assurance through measures such as requirement of higher education institutions to have ISO certification and an increase the number of programs that are accredited.
 - Increasing autonomy primarily through giving institutions the capability to earn income through levying student fees and income generation. However the Law on Education Legal Entity (BHP) was found to be unconstitutional. MoNE is currently looking at new mechanism to grant institutions greater autonomy.
 - Expanding number of polytechnics. ADB is working with MoNE to design and implement enhanced polytechnic system including building more polytechnics, improving quality and relevance of courses to be competency based and stronger links to industry so that training meets the skill needs of industry.

In that context some of the work AEI has been doing to support MoNE includes:

Teacher quality

- Sponsoring senior MoNE officials to undertake study tour to Australia in May to learn about Australian and state government initiatives to improve teacher quality and leadership skills.
- Visiting universities to promote Australia Awards scholarships to upgrade lecturers' qualifications.

Universities

- Encouraging research linkages between Australian and Indonesian universities through hosting of seminar series which aim to highlight Australia's excellence in research.
- Promotion of Endeavour Executive and Research Fellowship Awards as a vehicle for facilitate research collaboration and developing twinning programs.
- Also published and distributed to Indonesian universities information about Australian universities as well as a set by set guide on how to establish partnerships.
- In June this year in collaboration with MoNE and Austrade, we will be hosting an internationalisation workshop which will aim to build the capacity of Indonesian universities to further support research collaboration as well as student and staff exchanges with Australian universities.

VET

- We have provided support to the MoNE polytechnic taskforce in providing information about Australia's VET system focusing on competency based training, training packages and industry's role in development of training packages. We have also been talking with ADB about how we can assist and provide input into the polytechnic project.
- Broadened our government engagement in VET through signing of a formal agreement with Ministry of Manpower and Transmigration who have responsibility for vocational training centres. Under this Agreement AEI is sponsoring two Ministry of Manpower and Transmigration (MOMT) officials to undertake a four week internship with TAFE Directors Australia to learn about TAFE system and VET policy frameworks. In addition ten master trainers from the Vocational Training Centre will be doing a train the trainer course in Australia in April funded by AusAID.

Stephen Li, Director (Education) Singapore, AEI

Quick Market Update

- Student Numbers
 - 3022 higher education commencements (3171 in 2009)
 - 294 VET commencements (277 in 2009 –continue to grow since 2007)
 - Overall 3711 vs 3880 in 2009 (higher than 07 and 08)
- Economic growth expected to be 5% in 2011 (15% growth in 2010).

Quality Assurance

- Private Education Act - Council for Private Education(CPE) in Singapore
- Enhanced Registration Framework - 231 private education institutions (PEI) passed
- Edutrust (Provisional - 40)
(4 years - 17)
(Star – 0) as of 4 March 2011
- Collaborative approach with the Council
- Joint cross border projects amongst the agencies

Establishment of the CPE to enforce the Private Education Act.

Over 300 PEIs have submitted for Enhanced Registration Framework (ERF) and yet to be assessed.

Edutrust scheme to ensure PEI have subscribed to and providing students protection scheme.

CPE is still going through its teething stage. AEI will be working closely with CPE to enhance collaborative effort to achieve better understanding in quality assurance, shadowing each other's audits to help to build relationships at all levels amongst the agencies.

Transnational Education

- Over 20,000 students in Singapore
- Market consolidation
- Feedback from operators on market outlook positive.

Hub for International Students from the region. Total number of international students is about 100,000.

Due to the establishment of CPE, market is consolidating. Big providers swallowing up small provider or providing displaced students with places to continue their studies. Most operators are expecting growth in 2011. Singapore is a good hub due to cost of living, multicultural environment, and easy for regional students to settle and feel at home.

Research

- Research and Development received Monetary boost by an addition of \$1 billion
- Established research centres for collaborations
- Research centres of excellence
- High value returns to boost economic growth

In the new budget announced on the 18 February 2011, the national research fund will receive an addition of 1 billion Singapore dollars to the 6.5 billion dollars fund managed by the national research foundation. The fund has funded projects ranging from cancer research to solar energy harvesting. The government views this as long term investments to help the country to move towards a high-value economy with broad based innovative enterprises.

I have also noticed that the research centres are looking at compatible institutions to collaborate in research areas that would complement their capabilities. The news on these opportunities is often spread from within the communities.

Singapore wants to attract the world's best and they are willing to invest if they can see long term economic benefits.

Vocational Education

- Retraining market - with Workforce Development Agency
- Progression path for ITE graduates
- Secondary school graduates studied in the Technical stream

Priya Raja, Advisor (Education) and Shazia Naqvi, Officer (Education) New Delhi, AEI

Introduction

Priya Raja, Advisor (Education)

Shazia Naqvi, Research Officer (Education)

Apology

Peter Nolan, Counsellor (Education) was unable to be here today due to the Hon Michael Knight's visit to India as part of the strategic review of Australia's student visa program. He sends his apologies.

Market challenges

India is growing and changing at a fast rate. India remains one of the fastest growing economies in the world. Its economic growth for the last three years averaged 8.8%, with the GDP growth for 2009-10 around 6.8%. The services economy has led to an increase in the demand for skilled labour, which in turn has fuelled growth in the higher education sector.

With twenty percent of India's 1.16 billion population aged 5-14 years and with a median age of 20-30 years, India has the fastest growing education and training market in the world. In the next five years alone, an estimated 75 million youth between ages 18 and 25 will be joining the workforce.

Current pressures at all levels of the education and training system are brought about by the wide supply and demand gap and a high drop-out rate in each sector. Literacy levels in India are still below 75%, well below the government aim of full literacy.

The challenge for India is enormous.

- 71% of India's 1.2 billion population are below 35 years of age – India is young.
- 500 million people need to be up skilled by 2022 – over 21 times Australia's population. Current capacity is 4.3 million.
- 11 million students are in higher education – representing just 11% of 17-23 year olds.
- Unmet demand for university places is currently 4.7 million each year.
- India's Gross Enrolment Ratio is 12.7%. The goal is to increase this to 15% by 2012 and 22% by 2020. This is an increase equivalent to Australia's population by next year.
- India aims to set up around 1500 new higher education institutions, at least one central university in each state, and 14 new innovation universities.

India recognises that it can't achieve these goals alone.

The passage of the Foreign Educational Institutions (Regulation of Entry and Operations) Bill will enable Australian providers to set up campuses and offer full degrees in India. Currently, only twinning programs and joint degrees are recognised in India.

The temptation is already there for some to jump ahead of the pack. But in the absence of this legislation, graduates' qualifications are not recognised by the local authority for government jobs or further study in India.

Under the Bill foreign institutions will need approval by the Indian government to award full degrees and diplomas in India. Some of the conditions for obtaining approval will probably include:

- application be endorsed by the Australian High Commission
- 20 years track record in Australia
- a minimum corpus of INR500 million or around AUD11 million
- proof of status of accreditation in home country and financial soundness
- a not-for-profit principal, with 75% of the income received from the corpus to be used for development purposes and the remaining 25% deposited back into the corpus fund.

India also wants to see more foreign students study in India, particularly as a means to enhance the educational experience of domestic students. It is hoped that the passage of the Foreign Educational Institutions Bill will also stimulate greater student and faculty mobility with overseas institution campuses in India.

In terms of the numbers of students from India travelling overseas to study, Australia has seen a significant decline in numbers – around 48% on higher education commencements in 2010 and 22% in VET.

Indian students have been the highest represented of those affected by college closures in Australia and the perception of students being ‘duped’ by foreign providers is increasingly in the media spotlight, especially following the Tri Valley University fraud investigations in the U.S. which continued to see Australia also wrapped up in the media reporting. Concerns over Indian student safety in Australia also continue to be reported by the Indian media, though to a lesser extent than in 2010.

Australia’s cost competitiveness has also weakened. IDP in India reports a 30-35% difference now between Australian and UK universities for undergraduate programs. The strength of the Australian dollar, increased course fees and financial evidence required for student visas have made it difficult for many Indians to see value in Australia over our competitors, namely the U.S., U.K. and increasingly Canada.

Additionally, the range of study destinations is growing with Singapore, Netherlands, Russia, New Zealand, United Arab Emirates and China accelerating their marketing activities.

Australia’s low 5% unemployment rate remains one significant advantage, with many Indians still looking at overseas work and living options when choosing a study destination. And given the challenges of limited access to quality education, India’s youth will continue to seek higher education abroad.

While the market for transnational education is relatively untapped due to the uncertainty in India’s regulatory framework, twinning programs and collaborations continue to grow. And there is strong and increasing interest in Australia as an educational partner to assist India in meeting its massive educational reform agenda.

But India is a frustratingly complex and unclear operating environment and any activity by Australian providers there requires a long term commitment. Australian institutions who have invested heavily in India, such as Deakin University, are seeing significant rewards but they will tell you that it does require a long term strategy.

In terms of what the Australian Government is doing, AEI has focussed on further formalising the bilateral education engagement. The focus is on building Australia’s reputation to attract genuine students and develop quality government, industry and institutional linkages.

A Joint Ministerial Statement on Education Cooperation was signed last year and, as an outcome of that, this year Australia and India will explore the establishment of an Australia India Education Council (AIEC) to provide a high-level forum to progress bilateral education collaboration.

Minister Evans' expected visit to India in late 2011 as part of the annual Education Ministers' Meeting may provide a good opportunity for the inaugural meeting of the AIEC, if it is successfully established.

The Bureau for Vocational Education and Training Collaboration (BVETC), established last year to facilitate bilateral engagement in VET, has been successful with a number of formal agreements now signed.

MyOzNetwork.com – a new social networking site for alumni in India – celebrated its one year anniversary last month with over 2000 members. Alumni member groups have formed on the site, with almost all Australian universities now represented. Australian institutions are increasingly using the portal to advertise their activities in India and scholarships.

The Australia-India Education Joint Working Group (JWG) meetings will be in Canberra in April and may include a higher education forum with the senior Indian officials hosted by Universities Australia.

Peter Mackey, Austrade Education Commissioner for the South East Asia, South Asia, Pacific

Introduction

The South East Asia, South Asia, Pacific region combines a mixture of traditional and emerging source markets for Australia, and accounted for around 42% of total student enrolments in 2010. Six of the top ten markets for Australia are found in this region.

South Asia

Australia's reputation as a reliable provider of high quality education and training services has been diminished in India, and to a lesser extent surrounding markets, for a range of reasons. The approach Austrade is taking is to re-engage and re-position, and improve perceptions of Australian education in the region.

The Australian Education Excellence Showcase

Austrade considered that a concerted, targeted effort was required, and so for that reason Austrade ran a nine city road show in Delhi, Kolkata, Hyderabad, Mumbai, Chennai, Kochi, Pune, and Colombo called *The Australian Education Excellence Showcase* in February 2011. While the showcase was supported by some 25 Australian education providers it was not positioned as a student recruitment fair. The purpose was to reposition Australia by showcasing the quality and innovation of Australia's higher education system, the industry linkages to Australia's vocational education and training (VET) system, as well as highlight employment/careers trends and human resource demands in South Asia and demonstrate how Australia should be seen as a solution to those needs through a range of models.

Presentations and seminars were delivered by the Australian High Commissioner to India, Austrade, Australian Education International (AEI), the Department of Immigration and Citizenship (DIAC) as well by academic staff from the institutions attending. Austrade also involved its knowledge partner KPMG who talked about the human capital demands for the region and the integral role for education and training.

The program in each city targeted key education stakeholders from local universities, VET providers, schools – as key influencers as well as parents and students. The event received around 310 media items/articles/editorials as at the date of the AEI event. All of this resulting media coverage was positive and the road show has delivered positive outcomes for Australian education in the region.

Association of South East Asian Nations (ASEAN)

Austrade is working with AEI and DIAC on a range of activities in the region such as: agent engagement/information sessions which Austrade has run in markets such as Vietnam, Thailand and the Philippines.

A series of pre-departure briefings with AEI, DIAC and other relevant agencies across the markets in the region.

Other Austrade initiatives

Austrade is currently undertaking a pilot Visiting Researcher Program to Thailand, with co-funding from AEI. The purpose of this program is to showcase Australian excellence in research as well as to strengthen institutional collaboration, which helps to build a more sustainable sector. Austrade is looking to extensively expand this program throughout the region this year given the overwhelming response to this initiative from Australian education providers.

Austrade is also running a High School Counsellors Familiarisation Visit program in June to Australia from seven markets in the region to provide these key influencers with a better understanding of all of the sectors so they are better positioned to advise students about study options in Australia.

Visit by Professor Ian Frazer: Professor Ian Frazer will be visiting the region in April and Austrade will be hosting a series of events to showcase Professor Frazer's achievements and his documentary *Catching Cancer* to a range of key education stakeholders in the region.

International Education Seminar Series, May 2011 – Australia: Austrade will be running an extensive International Education Seminar Series around Australia from 16-25 May in Brisbane, Sydney, Melbourne, Adelaide and Perth to provide detailed market updates and provide an opportunity to meet one on one with Austrade's experienced education team from markets in the region (and around the globe) including South Asia, Thailand, Vietnam, Philippines, Malaysia, Singapore and Indonesia.