



Australian Government

Australian Education International

# Strategic Framework for International Engagement by the Australian School Sector 2008–2011



## Foreword

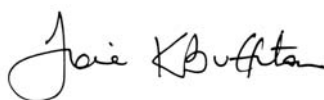
The school sector is an integral part of Australia's high quality, internationally recognised education and training system. The school sector, while a small player in the international education industry, undertakes a broad range of international activities with the social and economic benefits of these activities flowing to individuals, institutions and the wider community.

Australian Education International (AEI) seeks to further encourage and facilitate the international education achievements of the school sector. AEI provides up-to-date focussed market intelligence, positions Australia through initiatives including the *Study in Australia* brand, underpins the quality of education and training delivered to international students, and coordinates government support and assistance in partnership with the sector.

The Australian international education industry has seen rapid growth in recent years. The next period will be more challenging with our traditional markets increasing their domestic capacity and new competitors emerging. The priority for AEI over the next three years will be to work in partnership with the Australian school sector to achieve stronger recognition of the school sector's international engagement, and the benefits this brings to Australia's school system, Australian schools and their communities.

The *Strategic Framework for International Engagement by the Australian School Sector 2008 - 2011* (the Framework) focuses on opportunities for further engagement in international education and the challenges for the Australian school sector over the next three years. The Framework has been developed to provide a basis for consultation with stakeholders on how AEI will work with the sector to support its international engagement in a complex and changing global environment.

We are committed to developing strong and strategic cooperation between government and the sector as this is vital for the long term success of Australia's international education industry.



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# 1. Purpose of the Strategic Framework for International Engagement by the Australian School Sector

Australian Education International (AEI), the international arm of the Australian Government Department of Education, Employment and Workplace Relations (DEEWR), has developed this Framework to provide a basis for how AEI can work effectively with the school sector to support its international engagement over the next three years. It is designed to encourage a shared vision and greater collaboration and partnerships, amongst the key stakeholders of the sector.

The development of the Framework has been guided and informed by extensive consultation with the sector and a commissioned consultant report, *Meeting the World Halfway: Towards an Australian School Sector Strategy*<sup>1</sup>. The synopsis of the report is at Appendix A.

The Framework outlines how AEI will:

- strengthen strategic partnerships with school sector stakeholders
  - support a sustainable international school sector
  - work to ensure a quality international school experience
  - work to increase the international profile of Australian schooling.
- advance the outcomes of the Study in Australia brand evaluation, with particular attention to the need for school sector generic promotion
  - encourage schools to develop strategic partnerships and linkages, including across sectors
  - seek to showcase the quality of the Australian school education system to foreign government officials and other visitors examining Australian education and training.

Over the next three years, AEI will work in partnership with key stakeholders to:

- raise the profile of the school sector in international education forums and seek to increase engagement specifically with the school sector
- cooperate with the states and territories and the sector on the collection of information on the breadth of the sector's international education engagement
- identify world's best practice in school education and international engagement and, where appropriate, encourage its uptake in Australia
- undertake school sector specific research and analysis

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<sup>1</sup> Professor Malcolm Skilbeck and Dr Helen Connell, April 2006

## 2. Policy Environment

### 2.1 Australia's International Education and Training Engagement

In 2007, enrolments of international students in education and training institutions in Australia surpassed 400 000 for the first time. There were 455 185 enrolments by full-fee international students in Australia on a student visa in 2007<sup>2</sup>. This represents a 19 per cent increase on 2006.

The international education and training industry is a major export industry. It contributed \$11.7 billion to the Australian economy in 2006-07, making it Australia's third largest export earner<sup>3</sup>.

The benefits of international education, however, flow far beyond export dollars. International education brings science, research and innovation to Australia. It also brings foreign relations, national security, diplomacy and skilled migration benefits.

The social and economic benefits of international engagement flow to individuals, institutions and the wider community:

- International engagement builds linkages between Australian education providers and overseas institutions. These links facilitate the exchange of ideas, research and technology, as well as staff and students. Education providers participating in the international environment also contribute to global knowledge and gain valuable insights into international developments that benefit Australian education and training.
- The presence of international students in our education institutions and local communities enriches the educational experience of Australian students, as well as stimulating their interest in learning other languages, cultures and studying overseas. Educating overseas students provides Australia with opportunities to contribute to the education of the next generation of world leaders.

- International engagement allows Australia to identify and adopt world's best practice, thereby equipping Australian and international students with the skills required by a globally competitive economy and society.
- Showcasing Australia's excellence internationally helps Australia to influence international systems, promote international recognition of its qualifications and its quality assurance arrangements.
- The formation of personal and institutional relationships through international engagement establishes enduring friendships and partnerships in business and government. These underpin Australia's broader national interests in defence and security, environmental protection and trade.

Australia plays a leading role in international education and training issues through active involvement in a range of international forums. In the school sector this includes regular participation in, and contributions to conferences, papers and projects undertaken by organisations including the:

- Organisation for Economic Co-operation and Development (OECD)
- South East Asian Ministers of Education Organisation (SEAMEO)
- Asia-Pacific Economic Cooperation (APEC).

Australia is also leading the *Brisbane Communiqué* – a mechanism for building regional education and training quality and capacity in ways consistent with Australia's system.

### Whole of Government Engagement

The Australian Government—through AEI, AusAID, Austrade, the Department of Foreign Affairs and Trade (DFAT) and the Department of Immigration and Citizenship (DIAC)—actively encourages and facilitates Australia's international education and training engagement. This includes participation in multilateral, regional and bilateral Free Trade Agreement (FTA) negotiations that seek to promote international access to education services.

<sup>2</sup> AEI International Student Enrolment Data 2007

<sup>3</sup> *International Trade in Services, 2006/07* (ABS Cat No 5368 0 55 003)

AEI works to create an environment for successful international education and training engagement through:

- multilateral, regional and bilateral education cooperation with other countries
- underpinning the quality of education and training services delivered to international students
- achieving greater diversity of students, modes of education delivery and subjects offered
- coordinating government support in partnership with the Australian education and training industry.

AEI provides its services through a national office in Canberra and through the AEI International Network which has a presence in 25 locations worldwide.

The Australian Government works closely with state and territory governments to develop a whole of government approach to Australia's international education and training engagement. For their part, the state and territory governments are actively engaged in:

- promoting Australian education and training internationally
- facilitating government-to-government and institutional linkages through signing of agreements, hosting visits and delegations, exchanging information and staff
- providing support for student mobility
- undertaking international projects and consultancies
- recruiting international students
- monitoring and regulating international activities of Australian providers.

## 2.2 International Engagement by the Australian School Sector

The Australian international education industry encompasses both public and private organisations providing educational services to non-Australian students. The range of educational services offered by Australian providers across all sectors is extensive.

In 2007, there was strong growth in both enrolments and commencements in the school sector. Enrolments grew 11 per cent to 27 426 and commencements grew 25 per cent to 14 092. This reverses the trend of low or negative growth experienced since 2004.

In the school sector, the most visible engagement is the recruitment of full fee paying international students mainly at the secondary and senior school level. The sector comprises a diverse group of stakeholders including non-government schools, Catholic schools and the eight state and territory government school systems, as well as English language providers, private colleges and universities delivering school courses, mainly at the secondary school level, to international school students.

Many non-government schools and all the government school systems also offer school-based intensive English language preparation programs within their school for international students. Some schools and school systems also offer Foundation Programs and the International Baccalaureate alongside the Australian Senior Secondary Certificate of Education (SSCE).

Less visible is the engagement of Australian schools and their communities in a range of other activities such as:

- the offshore provision (including the sale) of Australian curriculum
- sister school relationships
- inward and outward bound study tours
- study term and year abroad teacher study tours
- visits and exchanges

- professional development programs for foreign teachers, principals and education officials
- the internationalisation of Australian curricula for domestic students.

The school sector has a number of inherent characteristics that differentiates it from other sectors in international education:

- *A large number of providers with small numbers of international students*  
In 2007 there were 428 Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS) registered providers offering school level courses. Across all providers the median enrolment was 13 international students.
- *Strong domestic focus of school enrolments*  
In 2007, there were 3 416 523<sup>4</sup> full-time school students in the Australian school systems. International students represented less than 1 per cent of the total school population. For schools and their communities, this is one element considered when allocating resources to initiate or to support existing international student programs.
- *Duty of care to all international students*  
There is a legislative obligation under the National Code of Practice for Registration Authorities and Providers of Education and Training to Overseas Students 2007 (the National Code) to ensure appropriate accommodation and welfare arrangements are in place for students under 18 years of age. The duty of care provisions are a core consideration in the approach taken by Australian schools to international engagement and management of programs, such as homestay and English language preparation.

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<sup>4</sup> Australian Bureau of Statistics, Schools, Australia, 2007 (ABS Cat No 4221 0)

## 3. Objectives and Strategic Directions

Australian Education International recognises that responsibility for the level and type of international engagement rests with schools and their communities. The role for AEI is to be a strategic partner to Australian school sector stakeholders in assisting them to engage internationally. AEI can:

- provide the sector with up-to-date market intelligence, including international policy developments
- position Australian education through initiatives including the Study in Australia brand
- underpin the quality of education delivered to international students
- coordinate government support and assistance in partnership with the sector.

### 3.1 Strengthen Strategic Partnerships with School Sector Stakeholders

#### Coherent Voice for the Sector

AEI's support to the international education industry is best applied when informed by industry needs and priorities. This requires effective consultation with industry in order to understand industry needs and a partnership approach to achieve an effective sharing of responsibility.

The first School Sector Stakeholders' Roundtable meeting held in March 2006 provided a model for a national school sector debate on specific issues, and to reach agreement and understanding on future directions. The meeting brought together a range of views and perspectives from government and non-government school representatives, as well as from school principal associations, the Curriculum Corporation, the Asia Education Foundation and state marketing bodies.

The majority of stakeholders support an annual School Sector Stakeholder Roundtable meeting as a way of bringing the sector together to discuss sector specific issues. AEI will host an annual meeting with stakeholders to determine priorities and activities for the coming financial year.

AEI will also hold annual meetings with relevant peak bodies and the views of industry will be obtained through discussions with relevant sector committees and government groups, including the Schools International Government Group.

#### Raising the Profile of the School Sector

The Framework represents the first step in the process of identifying how AEI can support the school sector to develop a sustainable international presence.

In its role as a strategic partner to the international school sector AEI works closely with state and territory governments to develop a whole of government approach to Australia's international education and training engagement. The recently established Joint Committee on International Education (JCIE) provides a forum for the Australian, state and territory governments to engage collaboratively in pursuing common strategic directions to support the sustainability of international education in Australia.

AEI will work with the school sector to raise its profile domestically and internationally in relevant forums including the JCIE and with bilateral and regional organisations such as the OECD, APEC and SEAMEO.

#### Formation of Strategic Partnerships

Given the small scale of international operations and the large number of providers, the formation of strategic partnerships and networks is important for the sector's future development. There are examples of school sector partnership and network arrangements, however they are not as widespread or active as they might be. There is a need for more partnerships, joint activities and sharing of resources and expertise to ensure the long term sustainability of the sector. Strategic partnerships may be formed to meet a range of outcomes, such as extending overseas marketing or addressing strategic policy issues.



## 3.2 Support a Sustainable International School Sector

The sector had positive growth in 2007 after a lengthy period of decline in enrolments from 2003 to 2006. Despite these encouraging signs, there are concerns within the sector about the long term sustainability of many schools' international student programs. A key priority for both government and industry is to achieve sustainable growth for the sector, through diversification and protecting and promoting the quality of Australian education.

In some markets, Australia's engagement in international education is also perceived as one-sided, with significant prominence given to the economic benefits that flow to Australia from international education. However, discussions with state and territory departments of education indicate that they support a broader range of international programs for teachers and students. These include teacher exchanges, study tours for students connected with either language study or other subject specific courses and sister school arrangements.

These activities add to the international experience of Australian students and accord with *The Adelaide Declaration on National Goals for Schooling in the Twenty-First Century*. The Declaration promotes understanding of the value of cultural and linguistic diversity, and students possessing the knowledge, understanding, values and skills to contribute to, and benefit from, such diversity in the Australian community and internationally.

The collection and dissemination of information on the breadth of Australia's international engagement would:

- enable understanding of its policy impact in terms of the contribution to governments' broader education and training objectives
- enable the sector as a whole to articulate a clear policy direction on the sector's broader international engagement
- facilitate a better understanding of the sector's strategic partnerships that may lead to identifying new areas for engagement or areas where engagement can be further enhanced
- contribute to increased understanding of the role that student exchanges and study tour experiences have in influencing Australian and overseas students to study abroad.

AEI will explore with sector stakeholders the collection of information on the breadth of Australia's international engagement, including student and teacher exchanges and school study tours, both inward and outward bound.

## Market Research and Intelligence

A range of market research and intelligence is available to the Australian school sector from both the Australian Government and other sources.

AEI has an ongoing program for market analysis that is generally country specific, focusing on the threats and opportunities for Australian providers in the market. Further research activity which focuses on specific aspects of particular markets, and which could relate to one or more sectors is planned. The investigation of the feasibility of undertaking more school specific research will be determined in consultation with the sector.

In 2006, AEI conducted an International Student Survey (ISS) across all sectors: Schools, English Language Intensive Courses for Overseas Students (ELICOS), Higher Education and Vocational Education and Training (VET)<sup>5</sup>. The schools component captured the perceptions of Year 12 international school students' experiences in Australia regarding their choice to study in Australia, level of satisfaction with education, pastoral and support services, social integration, and life in general and students' future plans and aspirations. The results of the school sector survey indicated that respondents' experiences of studying and living in Australia were very positive overall. Generally, respondents were highly satisfied with their stay in Australia, particularly with the key drivers of satisfaction such as the school, homestay, support services and perceived attitudes of Australians towards them.

With reliable and comparable enrolment data spanning a period of five years, a more in-depth analysis of the AEI Provider Registration and International Student Management System (PRISMS) database is planned to examine pathways and conversion rates for international students from Australian schools to the VET and higher education sectors.

Utilising the AEI International Network and other sources, AEI will continue to identify and disseminate to the sector information on international policy developments and world's best practice in schooling. Benchmarking the Australian education and training system against world's best practice will ensure that Australia has a world class education system. This will also ensure that international and domestic students are equipped with the skills required to compete in a global society.

State and territory governments also conduct their own market research, generally cross-sectoral, which have limited distribution within the government department or to subscribers within the state. There is potential for a more cooperative and coordinated approach across governments on school sector research to reduce duplication of effort and better identify research areas of benefit to the sector as a whole. AEI could assist in the development of a new (or modification to an existing) central mechanism to facilitate the systematic compilation and dissemination of school specific research activity.

AEI Online provides a range of information designed to assist Australian education and training providers to plan and develop their international business activities. AEI Online provides a single point of access to information about the regulatory environment, market intelligence and country specific analysis collected through AEI's International Network, monthly international student enrolment data, qualifications assessment information, research reports and publications, as well as a range of other AEI services. Much of the AEI Online website is in the public domain with information freely available to all providers. A small part of the site is password-protected, containing market-value information available only to Market Information Package (MIP) subscribers. Annual subscription to MIP is based on the CRICOS-registered provider's previous year's international student enrolment numbers.

<sup>5</sup> Copies of the ISS reports, including the 2006 *International Student Survey (Schools) – Final Year Secondary Schools Students Summary Report* are available to Australian CRICOS registered education providers at: [www.aei.gov.au](http://www.aei.gov.au)

## Promotion of Australian Education

Internationally, the Australian and state and territory governments have a vital role in raising awareness of the quality and capabilities of Australia's education and training system. Generic promotion of Australian education services by governments is important in:

- presenting Australia's education services as one system encompassing all education levels, fields and sectors
- highlighting the range of organisations, education modes and opportunities to study across Australia
- profiling Australia's quality assurance processes and structures for learning pathways within Australia
- providing government endorsement of the quality of Australia's education and training system.

*Study in Australia* (SIA) is the Australian Government's brand for the promotion of Australian education internationally. Its objective is to raise awareness of the unique study opportunities in Australia through the government agencies and industry bodies that have direct contact with students offshore.

In 2006, an evaluation of SIA provided advice and recommendations for improvements to the brand. As a result, a refreshed brand focusing on Australia's unique 'quality of education and quality of life' offering was launched in 2007. Recommendations for the school sector from the brand evaluation favours a stronger focus on the decision makers, parents and guardians, with information about the benefits of an Australian school education, such as flexible pathways to further education, the type of education experience, and the environment - culturally rich and safe. Further, there is scope to present schools as an integral part of Australia's high quality international education and training system.

AEI's approach to promoting the Australian school sector is country/region specific and is aligned with the country's stage of development – mature, emerging or niche markets. Importantly, AEI does not represent individual institutions but the sector as a whole.

Feedback from a number of Australian school sector providers has shown a preference for promotional events held overseas to be school-only events because of the targeted promotion that accompanies these events, along with the opportunity to meet with local education agents. While schools may have a preference for these sector specific events, it is also important that Australian schools participate in whole of sector events to demonstrate that Australian further education is underpinned by a high quality, internationally recognised school system.

## Education Agents

Education agents play a significant role in counselling and referring students to Australian education providers. Perhaps more than in other sectors, parents rely on the advice and services provided by education agents to make choices about where to send their child to study and to which institution. Schools with limited travel budgets also rely on relationships with education agents to represent them in markets.

Australian school providers have, however, reported reluctance by education agents in some markets to represent the sector. This is due in part to the additional workload associated with students under 18 years of age and the lower agent's commission compared with other sectors. AEI is working to address these issues through our International Network and agent training.

Agent training provided by AEI's International Network has strengthened relationships with local education agents and provided Australian institutions with certainty in selecting quality agents in a largely unregulated market.

AEI, in collaboration with DIAC and the Australian international education sector, has also supported an Australian registered training organisation to develop a free, online Education Agent Training Course<sup>6</sup>. The aim of the course is to further raise the professionalism and quality of education agents representing Australian providers by establishing a 'standard' in the level of skills attainment for agents.

### Homestay Accommodation

The ability of school communities to provide adequate homestay accommodation has been identified as a possible constraint to future growth.

Homestay is the most common form of accommodation for international school students enrolled with providers without access to on-campus boarding facilities. Homestay arrangements are also used by schools for student exchange programs and for study tours (both for profit and not-for-profit). This has resulted in pressure on quality homestay accommodation within school areas. Schools are responsible for maintaining and expanding the pool of homestay accommodation families. Finding homestay families for schools programs is often a balance between economic practicalities and meeting the social needs of international students. While schools are responsible for developing their own homestay policies, there is scope for key stakeholders to develop 'good practice' guidelines for managing homestay relationships, especially managing the expectations of students and homestay families and dispute resolution.

### 3.3 Work to Ensure a Quality International School Experience

Quality assurance is crucial to the long term sustainability of the international school sector. International students and their parents actively seek government endorsement of education systems when assessing their study options. The quality of education delivered to international students is underpinned by the quality frameworks which apply to all Australian education and training. International students are also protected by a legislative framework that provides robust and reliable consumer protection.

The *Education Services for Overseas Students (ESOS) Act 2000* regulates international education and training services for overseas students studying in Australia on student visas and provides consumer protection mechanisms to ensure overseas students receive the tuition for which they have paid.

The National Code 2007 includes a specific standard (Standard 5 – Younger students) regarding the provision of care to students under 18 years of age. Standard 5 clarifies the requirement that appropriate accommodation, support and general welfare arrangements be in place for the period that the student will be under 18 while in Australia. The provider must nominate the dates for which it will be responsible for these arrangements and for monitoring any changes to them.

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6 [www.pieronline.org/eatc](http://www.pieronline.org/eatc)

## Transnational Education

In November 2005, Ministers of Education and Training across Australia agreed to the Transnational Quality Strategy (TQS) to preserve and protect Australia's reputation as a provider of quality education and training when those services are delivered offshore.

An important element of the TQS is *The Australian List of Institutions and Courses in Other Countries* (AusLIST) – a searchable database of Australian registered providers delivering Australian qualifications/courses offshore. Membership of AusLIST<sup>7</sup> will be restricted to registered providers of Australian Qualifications Framework (AQF) and non-award ELT and Foundation Program courses where there are nationally agreed standards and quality assurance arrangements in place. Membership of AusLIST is available to eligible Australian providers delivering the Senior Secondary Certificate of Education (SSCE) offshore.

Data collection arrangements are being developed under the TQS for all sectors, including the school sector. AEI will work with state and territory governments to establish arrangements for the collection of data on the offshore delivery of the SSCE.

## 3.4 Work to Increase the International Profile of Australian Schooling

### International Cooperation

Multilateral, regional and bilateral education relations provide a sustaining and welcoming environment for international education and training engagement. Strategies employed by AEI to continue the significant investment in international cooperation on school issues include:

- organising and/or supporting outbound missions by Australian ministers, senior government officials and industry representatives to key markets
- hosting inbound visits by foreign education ministers and senior school representatives to showcase the Australian school system
- exploring opportunities to collaborate with foreign governments on a broad range of school education issues, including teacher professional development, curriculum development and teacher exchanges
- supporting relevant conferences, including providing financial support to facilitate attendance by international delegates
- signing bilateral or multilateral agreements to advance cooperation in schooling, including memoranda of understanding and FTAs
- advancing Australia's school education interests in multilateral forums.

<sup>7</sup> [www.transnational.deewr.gov.au](http://www.transnational.deewr.gov.au)

## Professional Development for School Sector Providers

AEI presents a series of international education industry seminars. These seminars provide industry representatives from all sectors with the latest policy directions and emerging trends relevant to Australia's international education and training engagement, and provide an opportunity to meet with AEI staff, particularly the offshore counsellors.

Professional development opportunities are also available through the *Endeavour Executive Awards*. The Awards provide opportunities such as intensive management training, peer-to-peer learning, short-term training, leadership and/or executive management training for high achievers in education, business, industry or government. The awards focus on building skills and knowledge through a host work environment rather than through formal enrolment in a study program at a host institution. The *Endeavour Executive Awards* provide an opportunity for teachers, principals and government education officials to work with counterpart organisations and schools in participating countries. Further information about the Awards can be found at: [www.endeavour.deewr.gov.au](http://www.endeavour.deewr.gov.au).

The *Endeavour Language Teacher Fellowships* (ELTF) program also provides opportunities for practising language teachers in Australian schools and trainee (pre-service) language teachers in Australian tertiary institutions to improve their language and cultural skills through an intensive short-term study program. Prioritised by the ten most commonly studied languages in Australian schools, these scholarships allow teachers to immerse themselves in the language and culture of the country in which they specialise and to update and enhance their skills.

## 4. AEI Support for the International School Sector

### 1. Strengthen Strategic Partnerships with School Sector Stakeholders

AEI will support and be a strategic partner to the school sector in Australia through:

- meeting annually with stakeholders to discuss school sector priorities and activities for consideration in AEI's business planning for the coming financial year
- regularly meeting with state and territory government agencies and peak bodies to exchange information on local issues and other developments associated with the implementation of the Framework
- promoting/initiating/leading a whole of sector approach to raise the profile of the school sector in relevant domestic and international education forums
- liaising with other agencies such as Austrade, AusAID, the Department of Foreign Affairs and Trade and the Department of Immigration and Citizenship on international education matters
- identifying and/or facilitating opportunities for cross-sectoral and cross-agency discussion and cooperation on issues of national interest, such as constraints on growth.

### 2. Support a Sustainable International School Sector

AEI is committed to working in cooperation with the school sector to grow Australia's engagement in international education through:

- developing, in discussion with the school sector stakeholders, appropriate school sector specific research proposals and programs to support the sector for consideration in AEI's business planning cycle for the coming financial year
- supporting the school sector through providing relevant, quality and timely information by:
  - compiling data on international school student numbers
  - identifying and disseminating to the sector information on world's best practice in schooling
  - supporting the collection of information on the breadth of the sector's international education engagement
  - releasing school specific market alerts and advice regarding emerging market opportunities
  - investigating the feasibility of a school sector area on AEI Online to facilitate access to good practice guides and other material to assist stakeholders and providers to engage internationally
  - developing, in discussion with school sector stakeholders, new generic messages and materials to promote the Australian school sector offshore.

### 3. Work to Ensure a Quality International School Experience

AEI will work to ensure a quality international school experience through:

- working with other Australian, state and territory government agencies to build on existing strong onshore and offshore quality assurance arrangements
- protecting Australia's reputation for quality education by communicating Australia's consumer protection and quality assurance regime to governments of other countries
- working with state and territory governments on arrangements for the collection of data on offshore delivery of the SSCE.

### 4. Work to Increase the International Profile of Australian Schooling

AEI will support and raise the profile of the school sector through:

- building stronger linkages with the Asia-Pacific region to advance greater cooperation in school education and professional development
- incorporating school education in multilateral and bilateral agreements, including in free trade agreements, where this will advance the interests of Australia's school education
- supporting visiting delegations to showcase the Australian school system to counterparts from relevant foreign government agencies and institutions in selected markets and to build linkages with Australian institutions.



## 5. Glossary

AEI	Australian Education International
APEC	Asia-Pacific Economic Cooperation
AQF	Australian Qualifications Framework
AusLIST	The Australian List of Institutions and Courses in Other Countries
CRICOS	Commonwealth Register of Institutions and Courses for Overseas Students
DEEWR	Australian Government Department of Education, Employment and Workplace Relations
DIAC	Department of Immigration and Citizenship
DFAT	Department of Foreign Affairs and Trade
ELICOS	English Language Intensive Courses for Overseas Students
ELTF	Endeavour Language Teacher Fellowships
ESL	English as a Second Language
ESOS	Education Services for Overseas Students Act 2000
FTA	Free Trade Agreement
ISS	International Student Survey
JCIE	Joint Committee on International Education
LOTE	Languages Other Than English
MIP	Market Information Package
National Code	The National Code of Practice for Registration Authorities and Providers of Education and Training to Overseas Students 2007
OECD	Organisation for Economic Co-operation and Development
PRISMS	Provider Registration and International Student Management System
SEAMEO	South East Asian Ministers of Education Organisation
SIA	Study in Australia
SSCE	Senior Secondary Certificate of Education
TQS	Transnational Quality Strategy
VET	Vocational Education and Training
YTD	Year to date

# APPENDIX A

## Synopsis of Meeting the World Half Way: Towards an Australian School Sector Strategy (2006)

The Australian schooling sector has over the past decade made rapid progress in increasing opportunities for students from other countries to study here. It is a story of success on many fronts and notable attainments by the education systems, sectors and schools. In celebrating the achievements, AEI and stakeholders now seek to address the many challenges which are posed by the question 'What next'. Alongside a sense of satisfaction with what has been done is the realisation that there are looming difficulties which must be overcome if the gains of the next decade are to equal those of the past.

### 1. Concerns to address

In projecting future strategic directions for international education in the schools sector, the starting point is a set of concerns about the particular issue of declining enrolments in Australian schools by fee paying students from other countries. For governments both federal and state/ territory and for many stakeholders in the industry, a key target is not just to arrest the recent decline in numbers, but to move again on to the growth trajectory which was achieved in the preceding decade.

Other concerns than volume growth are also being widely expressed across the country and in some neighbouring countries from which fee paying students are coming. These are first, that in the prominence given to the economic benefits to Australia of a largely one-way flow of students, too little attention is being paid to achieving a 'balance of trade' whereby more young Australians study abroad, for shorter or longer periods. There is concern, too, to ensure that in the education of young Australians preparing for life in the global community, adequate attention is given to knowledge of that community and the skills, understanding and values needed for effective participation as future world citizens.

The stronger 'voice' that stakeholders are seeking for the schools sector nationally needs to speak loud and clear in addressing these concerns. This requires active political leadership and dynamic policy making nationally and in all States and Territories, in all three sectors of government, Catholic and independent schools. It entails a systematic approach to solving problems that have been well identified and in overcoming difficulties that have emerged, many a result of rapid growth.

For all of this, clear and firm strategic directions need to be set, pursued through partnerships and even greater concentration of effort. With AEI playing a more visible as well as a more creative and supportive role, all systems, sectors and institutions can in their own way contribute more effectively to a new vision for international education. This vision arises out of and expresses a significant shift in orientation, captured by the expression 'meeting the world halfway'. This means not only Australians studying abroad as well as students coming here from other countries and a better balance between economic returns and wider educational outcomes, it also signifies a re-energising of the school sector of the international education industry.

### 2. Firm foundations on which to build

Through a consultative process involving a wide and representative group of stakeholders and other interested parties both within Australia and in the three source countries of Malaysia, the Republic of Korea and Singapore, evidence has been amassed on current developments, trends, issues and expectations. Conclusions fall into several distinct but related categories:

- Australia's engagement with the world through international education has a long and distinguished history.
- Over the past half decade at the national level a comprehensive legislative, policy-making, regulatory, quality assurance, whole of government structure has been put in place; in preparation for the next stage of development it is currently being refined.

- An extensive, highly regarded network of AEI counsellors provides a wide range of services offshore; first steps for an onshore counsellor network have been taken.
- Through memoranda, partnership agreements and in procedural ways Commonwealth, State and Territory activities are being coordinated to achieve synergies and produce a national whole of government approach.
- State and Territory systems have made rapid progress in developing policies and structures to establish a viable industry, mobilising resources, and putting structures in place to build a viable, long term schools market.
- Independent and Catholic schools, proceeding largely as individual units but increasingly through peak bodies, enrol the majority of overseas fee paying students; they are building on a long tradition of engagement.
- Education agents and direct recruiting by schools are the major vehicles for attracting overseas students.
- Although international education takes many forms such as study tours, teacher and student exchanges, LOTE and other curriculum content, at the national level only the fee paying international student aspect is well documented; overall policy coherence has yet to be achieved.
- A strong, expanding national data base now exists; it needs to be further enlarged.

### 3. Competitor and source countries

From other countries, either for long engaged in international education or more recent entrants, there is much to learn. Commonly seen as major successful competitors, the UK, the US, Canada and New Zealand together draw in very large numbers of fee paying students but in different ways. UK public policy is oriented not towards schools but further and higher education. It is independent schools and the voluntary sector that are the vehicles and as a sector they are not experiencing growth. Two powerful instruments are the British Council, with a global outreach and business culture, and a prestigious, internationally respected public examination system which

effectively channels international students into UK higher education. Domestic schools policy focuses on an international dimension in school curricula and supporting student and teacher exchange.

The USA, with its SAT and a network of international schools around the globe has a most effective pathway for international students into higher and post secondary education, and appears not to be active in recruiting into public schools. As in the UK, it is the private schools which take in fee paying international students. That market is active; data, however, are elusive.

While Canada has no federal government apparatus for education, as a country it has a very strong, positive image in the international community (aid, peace keeping, brokering of conflicts, humanitarian work etc). Provinces are very active and effective in the international education schools sector. Of particular interest, nationally, is the role of NGOs in promoting, supporting, researching international education, and the high visibility of international education at the schools level in several provinces.

New Zealand, with a close eye on policy development, structures and recruitment initiatives in Australia, is a keen competitor in the market. It offers an example of lean structures and direct local-national lines of communication with a very high proportion of schools involved and incentives in the way fee income is distributed.

The new destination countries, Malaysia and Singapore, are actively building international education hubs, taking lessons from the experience of Australia among others and focusing on building up a strong presence in the Asian market. The increasing use of English as a language of instruction, lower cost structures, the combination of high academic standards and an Asian cultural setting, the growth of international schools and a whole of government approach (which appears to include substantial subsidies), present emerging competitive challenges.

Evidence on source country potential for international students is mixed but overall the picture is positive, provided there is a strong renewal of interest in Australia by system and sector authorities and individual schools.

Notwithstanding the strengths of other countries long in the market, and emerging new challenges, Australia has a policy framework, legislative and regulatory structures, a depth of experience and levels of expertise that are highly competitive. There is much to build on and develop through further coordination of effort, more information sharing and networking, taking a global not just a regional view of future markets, and showing more interest in going offshore.

#### **4. Addressing barriers to growth and diversification**

The principal barriers that have been identified on the one hand to market recovery of fee paying students and, on the other, to strengthening international education in Australian schools include:

- the practice of capping numbers of overseas students in schools, together with the non-involvement of many schools and the relatively low overall participation in the market of the Catholic education sector
- increasing difficulties in providing adequate homestay and school boarding accommodation, and costs of providing additional facilities
- in some areas, the heavy influx of migrant and refugee families, hence extra demand for ESL teachers and other support staff
- costs and complexities for individual schools in participating in promotional and marketing activities offshore; costs of access to AEI intelligence
- training and expertise of the specialist staff needed in schools; also training for all teachers in inclusive classroom practices and accommodating the special needs of international students

- community attitudes (actual or perceived as potential) and incoming student preferences which militate against wider involvement of schools in regional-rural Australia and in lower socio-economic areas of metropolitan centres
- for other international education activities barriers identified include the disruptions caused by inward study tours and short stay visits, the cost of study tours abroad and the low rating of international education in system goals and priorities;

Overall, a commonly reported barrier is the lack of awareness and understanding in the community of the scale, significance and potential of international education for Australia's future in the world.

While none of these constraints and barriers should be regarded as insurmountable in the face of concerted nationwide effort, many stakeholders believe that too little is being done, planned or envisaged to address them. Requirements identified in addressing the barriers include:

- more Education Ministers, senior politicians and senior system managers engaging directly with international education issues
- overcoming historic tensions and rivalries among the different sectors of schooling (government, non-government) through active leadership within them
- engaging local government, national, regional and local media and community groups including the Education Cities movement
- further progress on whole of government, whole of country approaches
- use of incentives to engage more players
- involvement of the private sector in partnership with government in increasing investment in infrastructure
- strong AEI leadership.

## 5. Addressing an image problem

Concerns expressed both within Australia and source countries, especially the charge of 'voracity' in the fee paying issue, call for attention in two ways: first, the aforementioned broadening of the base of international activities and actively promoting a more inclusive image internationally; second, ensuring that the highest standards of education, care and engagement with Australian society govern students' experience; third, showing more generosity. A new image of 'partnerships in the education of future citizens of the world to create a shared international life' is needed to drive out the perception of Australia as a country much better at taking than giving and sharing. Specific examples would include scholarships for needy overseas school students to overcome a sense that only wealthy families can meet the costs; more direct support for teachers, administrators and policy makers from less prosperous countries to spend time in Australia and more joint activity offshore especially in the growing international schools sector.

## 6. Why is Australia involved in international education?

Overcoming barriers and addressing concerns in the quest for the growth and diversification of international education will require great effort and commitment. It is reasonable to ask for a rationale. It is necessary in setting forth strategic directions to be confident of the likely benefits. The first question is why school students come here from overseas countries and what is it that Australia offers them? The widely agreed explanations encompass:

- to learn English
- to embark on a pathway into university or VET
- to escape the excessive pressure and inflexibilities of schooling as experienced in the home country
- to appreciate and enjoy the Australian way of life

- to be more independent
- eventually to gain permanent residence, settle and work here.

In short the aspiration is for 'a better life'. These can all be viewed and should continue to be presented positively as real contributions Australia is making to the international community, and as substantial returns to the investments families and students are making.

These are not, however, just altruistic. Australia does indeed gain economically both directly and indirectly from the influx of students. The presence of international students can enable Australian students to broaden their horizons (but this requires that schools and families move to achieve closer integration, better cross-cultural communication, and more shared activities in and out of school). There are, also, longer term benefits for the country in a network of former students in overseas countries. Finally, by opening its doors, encouraging students to study here and to study overseas, Australia is displaying openness to the world, a readiness to be an active partner in a common quest. The response to globalisation should capture its economic benefits. But it is no less necessary to understand – and promote – educational values and processes that are enriching for individuals, societies and cultures. The rationale is clear and strong. It needs to be more vigorously communicated both within Australia and abroad.

## 7. Strategic priorities

Three priorities are proposed in setting strategic directions for the next half decade:

- A range of measures is outlined *to reverse the recent downward trend in fee paying markets* – through more intensive marketing including active exploration of new markets, globally, together with collective action by Commonwealth, States/Territories and the private sector to overcome barriers and address concerns, including increased investment.
- *Developing and implementing a total quality agenda* taking in all of the elements from promotion, marketing, enrolment, educating and caring for students, the profile of Australia international education within and beyond Australia, to state of the art procedures for monitoring, evaluating, reporting and improving performance against nationally agreed standards. Specific attention needs to be given as well to strengthening the foundation courses. For students under the age of eighteen, definite steps should be taken to bring them closer in status and educational quality to Year 12 schooling.
- *Accomplishing a diverse, better balanced profile of international education* which incorporates alongside incoming fee paying international students a range of new measures and a sharper national focus on established practice, to include: encouragement and support to a greater offshore presence through international schools; partnerships; availability of a nationally branded end of school qualification based on common standards (Australian Certificate of Education); encouragement and support for the organisation and management of study tours; teacher/student exchange and sister school relations; greater availability of scholarships; and Federal, State and Territory Education Ministry initiatives, such as working parties to present a profile of international education which is across the whole curriculum, including LOTE.

In addressing these priorities, the human and organisation resource base must be strengthened, through professional development for teachers, organisers, managers, marketers, agents and all categories of technical and support staff. The *knowledge base* in the form of statistics, research and communication networks, already strong, needs to be enlarged to encompass the full range of activities under the international education umbrella, with a sharper focus on evaluative and decision-making requirements ('knowledge for what purpose and whose use'). The unavailability nationally, of data on the broad scope of international education activities is a weakness in profiling and presenting holistically Australia's international education endeavours. It also stands in the way of identifying resource needs and efficiencies in resource utilisation. The knowledge emphasis should shift towards an intelligence and brokerage service that AEI is able to provide, in conjunction with States, Territories and sectors. This will require a greater readiness to share data and to accept that transparency and collaboration will aid, not hinder, competitiveness.

## 8. Vision and innovation

The vision toward which stakeholders are reaching requires stronger, more visible leadership by AEI, more active, effective partnerships across the country and internationally, more collaboration and recognition that this is a common effort requiring many changes but promising shared benefits. The point in referring to an innovative culture and not only a vision for the future is that strategic directions are not simply accretions or adjustments. They are both goal and value oriented and underpinned by structural organisational and procedural changes. These need to occur at the three levels of:

- *national government*, with a whole of government mode under DEST leadership: continuing strategic momentum and clear visibility to and acceptance by, the field; stronger structures to provide a national voice and schools sector forum and a national intelligence service on and for international education
- *State and Territory governments*, with a continuing drive towards policy coherence and integrated whole of government strategies, full cross-sectoral engagement and a range of support measures to overcome the identified barriers to growth
- *schools*, with a shift from an 'add on' approach to one which fully integrates the dimension of international education with the whole of school life, identifies specific needs and engages with providing authorities and governing bodies in meeting the needs and, in turn, is rewarded for success.

## Further information

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