

8 March 2019

Professor Ian O'Connor AC
Higher Education Standards Panel
Department of Education and Training
50 Marcus Clarke Street
CANBERRA ACT 2600

Dear Professor O'Connor

REVIEW OF THE HIGHER EDUCATION PROVIDER CATEGORY STANDARDS

On behalf of Charles Sturt University, I am pleased to provide this submission to the Higher Education Standards Panel (HESP) in response to the Panel's discussion paper, *Review of the Higher Education Provider Category Standards – Discussion Paper* (Attachment 1) and call for responses to the questions raised in the Paper.

To quote from the Discussion Paper:

“The 2017–18 Commonwealth Budget included a measure for the HESP to oversee a review of the Higher Education Provider Category Standards (PCS). On 17 October 2018, the Hon Dan Tehan MP, Minister for Education, announced the appointment of Emeritus Professor Peter Coaldrake AO to undertake this review with oversight from the HESP.

The PCS describe different categories of higher education providers, and requirements expected of them, for registration by the Tertiary Education Quality and Standards Agency (TEQSA). The PCS are part of the Higher Education Standards Framework (Threshold Standards) 2015 which sets the high standards required to operate as a higher education provider or university in Australia.

Australia's model for categorisation of higher education has remained fundamentally unchanged for almost twenty years. Over this period, the higher education system itself has experienced significant transformation as it adjusts to meet the 21st Century needs of Australians and the global international education market.”

The fact that the existing categorisation arrangements for higher education provision in Australia have remained unchanged for more than two decades, while the system itself has undergone dramatic market, delivery and provider change, demonstrates that the current structure of the higher education sector meets the needs of students, employers, community and the sector itself. Further, in this time, Australian participation and completion rates in higher education have increased dramatically and the university sector has grown to be the second largest international education provider in the world, after the USA. These successes demonstrate that Australia's model for categorisation of higher education is fit for purpose.

Provider Characteristics

Charles Sturt University believes that the characteristics that define higher education provider and university in the PCS should not be changed. The University believes that the existing PCS definitions position Australia's higher education providers and universities to continue their success of the last decade or two, including continued increases in higher education participation and completion rates by Australians and continuing to grow export earnings through international education, including meet the Australian Government's targets in the *National Strategy for International Education 2025* (Attachment 2) and the *Australian International Education 2025 Roadmap* (Attachment 3).

In addition, the existing PCS categories of Higher Education Provider and Australian University including their respective definitions, have been particularly successful at bridging the metropolitan-regional divide in Australia. The current PCS arrangements permit and foster the customisation and tailoring of student service and provider delivery for the needs of our regional cities, rural towns and remote communities.

While much remains to be done to address lower participation and completion rates in regional Australia compared to metropolitan Australia, the existing PCS categories and their definitions provide the best sector framework for continuing this work as they provide an effective mechanism for *in situ* university development and delivery of teaching, learning, research and engagement in regional, rural and remote Australia. This flexibility, which promotes diversity in educational solutions that meet local needs, provided by the existing PCS arrangements, will be essential to ensure that the outcomes sort from the *National Strategy for Regional, Rural and Remote Education* (see, <https://www.education.gov.au/national-regional-rural-and-remote-education-strategy>) are effectively and efficiently achieved.

Current Trends and Emerging Needs

Charles Sturt University believes that the PCS remain fit for purpose to ensure that Australians possess the knowledge and are equipped with the skills to capture the opportunities and address the challenges of the 21st Century, be they economic, social or environmental. The PCS provide an effective framework for addressing current market trends.

Further, the University believes that the existing PCS arrangements provide sufficient flexibility for the higher education system and providers to adapt and adjust to long-term trends such as technological change, market disruption, everchanging consumer drivers, geopolitical uncertainty and the rise of institutional cynicism. Again, the PCS provide an effective framework for meeting emerging market needs and consequently, should not be changed.

Provider Categories

The table on Page 10 of the *Review of the Higher Education Provider Category Standards – Discussion Paper* provides a numeric analysis of the provider types currently registered under the PCS sector framework, while the table on Page 8 of the Paper provides a breakdown on student enrolments by provider type.

A review of the data provided in both tables demonstrates that the sector, in effect comprises 127 higher education providers and 40 Australian universities, with more than 90 percent of all student enrolments at Australian universities alone. Based on this market analysis, a case could be developed and put forward for removing all higher education provider categories from the PCS other than higher education providers and Australian universities.

While growth of both student numbers and provider registrations in the Australian University College, Australian University of Specialisation, Overseas University, Overseas University of Specialisation PCS categories has been non-existent, or if anything gone backwards over the last decade, Charles Sturt University, does not in and of itself see this market dynamic as a reason to remove any of these categories from the PCS. These categories should remain in the PCS to ensure on-going opportunity for system flexibility and innovation delivery to meet the needs of providers, students, community, industry, governments and regulator. Further, given the successes of the higher education sector under the existing PCS the University does not support the addition of any new categories to the PCS.

Category Revision

As discussed above, the existing PCS arrangements have enabled long-term and continued success of Australia's higher education and university sector.

These successes demonstrate that Australia's model for categorisation of higher education is fit for purpose. Consequently, the University does not support any change to the PCS.

Stakeholder Impact

Charles Sturt University's suggestions to continue with the existing PCS arrangements that have served Australia so well over the last decade or two, will ensure that the higher education sector continues to meet the needs of providers, students, industry, regulator and broader public interest. As well as, ensure that Australia's international education presence continues to play a role as a global leader and underwrites substantial export earnings for the country.

Charles Sturt University's support for the existing PCS including existing provider category types, as well as the definition and scope of each type, as put forward above, will ensure the drive for better educational outcomes for students and communities across New South Wales and Victoria continues unabated. Further, continuing with the existing PCS arrangements will assist the Australian Government in achieving the crucial outcomes sort from the *National Strategy for Regional, Rural and Remote Education*.

I would be delighted to provide further information to the Panel and would be available to provide evidence at any proposed consultations that that Department may undertake in relation to the issues raised in the *Review of the Higher Education Provider Category Standards – Discussion Paper*.

Yours sincerely

Professor Andrew Vann
Vice-Chancellor



Australian Government

Review of the Higher Education Provider Category Standards

DISCUSSION PAPER

DECEMBER 2018



Discussion paper

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Disclaimer

As this is an independent review, the discussion paper does not necessarily reflect the views of the Australian Government.

This document must be attributed as the *Review of the Higher Education Provider Category Standards – Discussion Paper*.

Reviewer

Emeritus Professor Peter Coaldrake AO

For the Higher Education Standards Panel

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List of Acronyms and Abbreviations

AQF	Australian Qualifications Framework
Bradley Review	Review of Australian Higher Education 2008
CSP	Commonwealth Supported Place
CGS	Commonwealth Grant Scheme
HELP	Higher Education Loan Program
HESA	Higher Education Support Act 2003
HESP	Higher Education Standards Panel
National Protocols	National Protocols for Higher Education Approval Processes
PCS	Higher Education Provider Category Standards
SAA	Self-Accrediting Authority
TEQSA	Tertiary Education Quality and Standards Agency
Threshold Standards	Higher Education Standards Framework (Threshold Standards) 2015
VET	Vocational Education and Training

Purpose

The 2017–18 Commonwealth Budget included a measure for the Higher Education Standards Panel (HESP) to oversee a review of the Higher Education Provider Category Standards (PCS).

On 17 October 2018, the Hon Dan Tehan MP, Minister for Education, announced the appointment of Emeritus Professor Peter Coaldrake AO to undertake this review with oversight from the HESP.

The PCS describe different categories of higher education providers, and requirements expected of them, for registration by the Tertiary Education Quality and Standards Agency (TEQSA). The PCS are part of the *Higher Education Standards Framework (Threshold Standards) 2015* which sets the high standards required to operate as a ‘higher education provider’ or ‘university’ in Australia.¹ The PCS fulfil a range of functions.



Australia’s model for categorisation of higher education has remained fundamentally unchanged for almost twenty years. Over this period, the higher education system itself has experienced significant transformation.

Demand for higher education has dramatically increased as Australia and other countries across the world transition from industrial to knowledge-based economies. Access and participation in higher education has rapidly expanded through developments in technology, innovative approaches to delivery, and globally mobile and connected students, academics and researchers. Student cohorts are more diverse with different learning backgrounds and needs, motivations and aspirations for learning, and expectations of higher education providers. New types of higher education providers and institutional partnerships have also emerged, such as those primarily offering pathways to second or later year entry to university, dual sector institutions, and providers with a significant focus on online delivery. Indeed, Australia’s higher education sector is reflective of the complex world around it – a world increasingly looking to it for solutions.

¹ Note that four standards (Provider Registration Standards, Provider Category Standards, Provider Course Accreditation Standards and Qualifications Standards) are part of the Threshold Standards.

Australia's higher education sector has established a reputation as an education leader globally. International education has become Australia's third largest export and largest service export, now estimated to be worth more than \$32 billion annually to the Australian economy and supporting more than 240,000 jobs across Australia. The most recent International Student Survey (2016) indicated 94 per cent of international students selected Australia as a study destination because of the reputation of Australia's strong education system and the reputation of its courses.²

The higher education sector will need to continue to innovate in order to respond to emerging needs and challenges brought about by globalisation, international mobility, technological advancements, demographic shifts, the changing nature of work, continued massification of higher education, and increasing competition in international education.

Australia is positioned well by a strong and dynamic higher education system. The PCS, as part of the Threshold Standards, have helped set requirements for the quality higher education system that exists today. Australia could continue to operate under the existing PCS. However, the sector is not static and nor therefore should be its PCS. It is important that Australia consider how it wants the PCS to support a quality higher education sector for the future. This review provides an opportunity to reflect on the current usage of the PCS and pivot, if required, to best capitalise on the strengths of an evolving sector. As such, this is an opportunity to consider the PCS through a contemporary and critical lens, to ensure they are fit for purpose against Australia's changing higher education landscape, comparable to international benchmarks, and accommodating to innovative and changing practice.

There are some big considerations to explore, some of which are set out in this discussion paper. These include the way in which Australia continues to define its higher education providers and universities, signals differentiation across the sector, and optimises the PCS to best meet student, industry, regulator and government need.

It is important to note that this review will not seek to reframe the Australian tertiary system and its broader policy and regulation. Rather, it will examine a discrete and important part of the Threshold Standards – Part B – to ensure that the PCS remain an effective framework for higher education delivery in Australia.³ Importantly, Part B also sets out criteria for providers seeking authority from TEQSA for self-accreditation of some or all of their courses of study. These links to the PCS will be examined as part of this review.

This PCS review is being conducted alongside a review of the Australian Qualifications Framework (AQF), led by Professor Peter Noonan.⁴ The AQF identifies criteria for senior secondary school, vocational education and training (VET) and higher education qualifications across a nationally recognised structure comprising ten levels. The AQF review aims to position the AQF for the future as a flexible and responsive instrument describing Australian qualifications and reflecting international best practice. That review will consider how to incorporate new and emerging qualification types such as micro-credentials into the AQF, whether and how to incorporate 'future' skills into the AQF, and how to better facilitate pathways for students between VET and higher education.

² Australian Government Department of Education and Training (2017) *2016 International Student Survey Results*.

³ Part B of the Threshold Standards is available at www.legislation.gov.au/Details/F2015L01639/Html/Text#_Toc428368878

⁴ For more information on the AQF review, visit www.education.gov.au/australian-qualifications-framework-review-0

With higher education providers under the PCS offering qualifications from Level 5 (Diploma) through to Level 10 (Doctoral Degree), there is appreciation of provider interests and potential synergies between the PCS and AQF reviews. The lead reviewers are therefore conscious of ensuring coordination and alignment of the two reviews.

The final PCS review report is expected to be submitted to the Australian Government in the second half of 2019.

Terms of Reference

The review of the PCS will:

- a) Assess the effectiveness of the current PCS as a framework for higher education delivery
- b) Identify any technical or other relatively minor changes that should be made in the short-term to improve the operation or effectiveness of the current PCS
- c) Analyse a range of possible different systems for the categorisation of higher education institutions, drawing on international experience and recent critical analysis including:
 1. the key characteristics that are or would be relevant to defining the various categories of provider within each categorisation framework canvassed
 2. the benefits and drawbacks of each approach for students, for higher education providers, other tertiary education providers, regulators, governments and the broader economy
 3. the impact of adopting different institutional categories, for example:
 - The potential for diversity of providers and student populations in each system
 - Appropriate barriers to and facilitation of new provider entry
 - Change management and transitional issues that would need to be taken into account in moving to a new approach
- d) Outline realistic and practical options that could be considered for adoption if a revised approach to categorising higher education providers in the Australian context were deemed to be warranted
- e) Make recommendations as to:
 1. the most appropriate categorisation system for Australian higher education delivery and
 2. criteria settings within each of the recommended provider categories.

Stakeholders will be consulted as part of the review.

Context

What are the PCS?

The PCS are part of Australia's national quality assurance framework and are set out in *Part B: Criteria for Higher Education Providers* of the Threshold Standards. They classify the types of education providers that can be registered by the national higher education regulator TEQSA to deliver higher education in Australia.

The PCS reflect and formalise key elements of differentiation in Australia's higher education sector, particularly the distinctions between providers that may label themselves as a 'University' or non-university 'Higher Education Provider'.

All providers of higher education that gain registration by TEQSA through meeting the Threshold Standards become a 'Higher Education Provider'. This title signals to the public that they are a provider of quality higher education in Australia. Those that meet additional criteria in research, scholarship and community engagement may seek approval from TEQSA to be registered in one of the university categories.

There are six categories under the PCS, which define the expectations by provider type.

Provider category	Criteria overview
Higher Education Provider	Must be an institution (Australian or overseas) offering at least one accredited higher education qualification course in Australia. These institutions are generally not self-accrediting and do not need to be engaged in research within their fields of teaching. They can apply for authority to self-accredit some or all of their courses.
Australian University	Must meet the requirements of the 'Higher Education Provider' category, be self-accrediting and deliver undergraduate and postgraduate courses of study that meet the Higher Education Standards Framework across a range of broad fields of study, including Masters Degrees (Research) and Doctoral Degrees (Research) in at least three of the broad fields of study it offers.
Australian University College	A provisional category for institutions with realistic plans to meet the criteria for an 'Australian University' or 'Australian University of Specialisation' within five years.
Australian University of Specialisation	Must fulfil the same requirements as an 'Australian University', but are only required to offer qualifications and conduct research within one or two broad fields.
Overseas University	Must be recognised as a university by its home country and meet criteria equivalent to the 'Australian University' category.
Overseas University of Specialisation	Must be recognised as a university by its home country and meet criteria equivalent to the 'Australian University of Specialisation' category.

Historical context

The PCS are based on the *National Protocols for Higher Education Approval Processes* (National Protocols) which were first adopted by State and Territory governments in 2000, and updated in 2007. The National Protocols were used by States and Territories for the regulation and accreditation of higher education up until the establishment of TEQSA in 2011.

The development of the National Protocols followed the attempt by new entrants of uncertain quality to operate in Australia, and the interest in protecting the reputation of Australian higher education and its established public universities. In particular, the short-lived and controversial establishment of Greenwich University as a distance educator in Norfolk Island in the late 1990s highlighted the absence of an agreed national approach to higher education approvals and protection of the term 'university'. The National Protocols were designed to ensure consistent criteria and standards across Australia for the recognition of new universities, the operation of overseas higher education institutions in Australia, and the accreditation of higher education courses to be offered by non self-accrediting providers. Around the same time, the Government amended the *Corporations Regulations 2001* to protect the title 'university' in Australia.

In 2008, the Australian Government initiated a Review of Australian Higher Education (Bradley Review) to consider the future direction of the higher education sector. A key recommendation was a focus on ensuring the quality of the higher education sector and the education it delivers. It noted that in a period of expansion, when higher education providers are attracting students who have not traditionally considered going to university and student pathways are linked to funding, higher education providers will be required to demonstrate that their graduates have the capabilities that are required for successful engagement in today's complex world. It also identified that Australia must enhance its capacity to demonstrate outcomes and appropriate standards in higher education if it is to remain internationally competitive. It called for the development of clear and strong standards which can be applied across the sector in order to establish objective and comparative benchmarks of quality and performance.⁵

Consequently, the Bradley Review recommended the establishment of a national quality assurance and regulatory agency which would be supported by the adoption of a new framework for higher education accreditation, quality assurance and regulation. In 2009, the Government announced the establishment of TEQSA as a single national regulatory and quality assurance agency for higher education.

With the establishment of TEQSA came new Threshold Standards that were tabled in Parliament in 2011. These initial Threshold Standards were largely based on the National Protocols that were already in existence at the time and included the PCS we know today. The *Tertiary Education Quality and Standards Agency Act 2011* also established the HESP to advise and make recommendations to the Minister for Education on making and varying the Threshold Standards. The HESP's first task, as set out in the legislation, was to undertake a thorough review of the Threshold Standards to ensure they were fit for purpose.

⁵ Detail from the *Explanatory Statement Tertiary Education Quality and Standards Agency Act 2011*, Higher Education Standards Framework (Threshold Standards).

Between 2012 and 2014, the HESP reviewed the Threshold Standards and a revised legislative instrument was tabled in Parliament in October 2015. The new standards took effect from 1 January 2017. It is important to note that the PCS element of the Threshold Standards were not included in this review. The HESP concluded that provider categorisation is as much a matter of public policy as it is of standards for higher education and, as such, necessitated a separate piece of work. That examination is the focus of this PCS review.

Shape of the current system

Australia's higher education sector currently comprises 170 TEQSA registered providers.

Provider category	SAA*	Non-SAA	Total providers	Student numbers
Higher Education Provider	12	115	127	132,951 [^]
Australian University	40	0	40	1,206,415 ^{**}
Australian University College	0	0	0	0
Australian University of Specialisation	1	0	1	1,279 ^{**}
Overseas University	2	0	2	183 ^{**}
Overseas University of Specialisation	0	0	0	0
Total	55	115	170	1,340,828

Source: TEQSA National Register summary table (accessed 03/12/2018 from www.teqsa.gov.au/national-register)

*SAA = Self-Accrediting Authority (a provider can self-accredit some or all of its courses)

**Student numbers equates to a headcount of all students, 2017 reference year (Source: Department of Education and Training Higher Education Statistics 2017)

[^] As of 2018, there are 127 providers registered by TEQSA in the 'Higher Education Provider' category, however, the student numbers for this category are based on latest available data from the 133 providers active in 2016 (Source: TEQSA (2018) *Statistics Report on TEQSA Registered Higher Education Providers*).

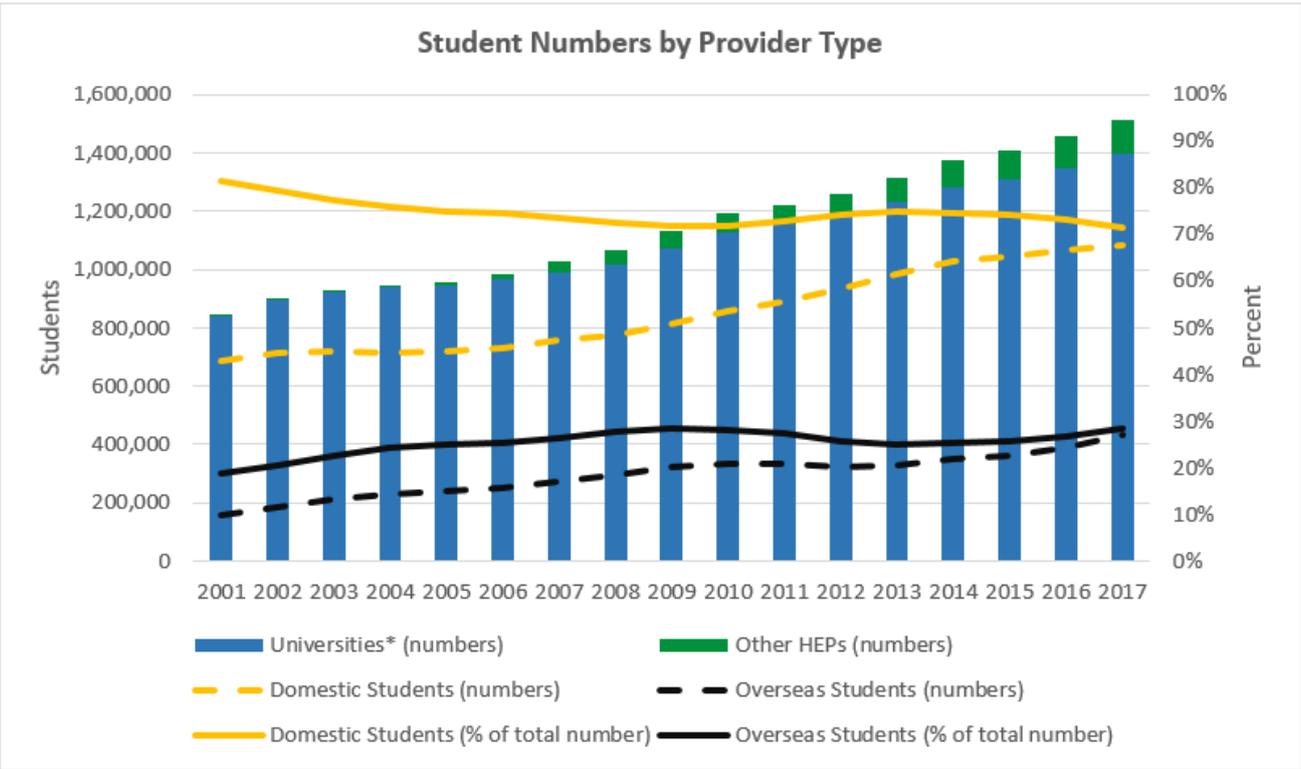
'University' category providers include:

- 37 public universities
- 2 private not-for-profit universities (Bond University and University of Notre Dame Australia)
- 1 for-profit university (Torrens University)
- 1 registered as an 'Australian University of Specialisation' (University of Divinity)
- 2 registered as an 'Overseas University' (Carnegie Mellon University and University College London, although the latter no longer has a dedicated campus nor offers courses in Australia)
- no institutions registered under the 'Australian University College' and the 'Overseas University of Specialisation' categories.

Non-university 'Higher Education Providers' include:

- not-for-profit providers including some Government semi-autonomous bodies
- for-profit stand-alone proprietary limited companies, sometimes with related VET provider companies, or that provide VET programs from the same (dual sector) company
- for-profit proprietary companies that are subsidiaries of a wider corporate group (either Australian or overseas-owned)
- faith-based colleges, some of which are standalone and others affiliated in a consortium
- online-only providers
- providers that specialise in one or more fields of education and providers that have multiple fields of education
- providers that offer established diploma or foundational course pathways into degrees at a single university, or multiple universities.

Australia’s higher education sector has experienced significant growth since the inception of the National Protocols in 2000, driven by increased demand for higher education by domestic and overseas students.



* Includes Table A, B and C providers under HESA (refer Funding section below).

Funding

The majority of higher education funding is administered under the *Higher Education Support Act 2003* (HESA). Under HESA, providers are listed under Tables A, B and C:

- Table A – Australian public universities and Batchelor Institute of Indigenous Tertiary Education
- Table B – four Australian private universities (Bond University, University of Notre Dame Australia, MCD University of Divinity, and Torrens University)
- Table C – Carnegie Mellon University and University College London (registered by TEQSA in the ‘Overseas University’ category).

Funding set out under HESA includes:

- the Commonwealth Grant Scheme (CGS) – through which the Australian Government subsidises tuition costs for domestic higher education students via Commonwealth supported places (CSPs). Table A universities are able to enrol as many domestic students in bachelor-level CSPs as they wish, except for medicine courses. Under current policy, CGS funding for these students is capped, but it was previously demand-driven. Universities continue to receive student contributions for every Commonwealth supported student enrolled. Table A universities are also allocated a certain number of postgraduate and sub-bachelor CSPs. Non-Table A providers are funded for CSPs based on allocations by the Australian Government. While funding is provided primarily to support the teaching of students, the Government does not prescribe how CGS funding must be spent by universities.
- the Higher Education Loan Program (HELP) – which provides income contingent loans to help students meet their study costs through higher education providers approved under HESA, such as FEE-HELP.
- Research block grants – which provide block funding to eligible Australian higher education providers for research and research training. Table A and B providers are eligible for research block grants on a calendar year basis using program-specific formulae that reward the performance of providers in attracting research income and the successful completion of higher degrees by research.

Provider category	Total number of providers in provider category [^]	Number of providers that currently access CGS [*]	Number of providers that currently access FEE-HELP ^{^^}	Number of providers that currently access research block grants ^{**}
Higher Education Provider	127	6	94	1
Australian University	40	38	40	40
Australian University College	0	0	0	0
Australian University of Specialisation	1	0	1	1
Overseas University	2	0	2	0
Overseas University of Specialisation	0	0	0	0

[^] Source: TEQSA National Register summary table (accessed 03/12/2018 from www.teqsa.gov.au/national-register).

^{*} Sources: *Higher Education Support Act 2003*, *Commonwealth Grant Scheme guidelines 2012* and Department of Education and Training.

^{^^} Sources: *Higher Education Support Act 2003* and Department of Education and Training.

^{**} Sources: *Higher Education Support Act 2003*, *Other Grants Guidelines (Research) 2017*, *Commonwealth Scholarships Guidelines (Research) 2017* and Department of Education and Training.

While the PCS have no direct relationship to Commonwealth Government funding for teaching and research, and funding considerations are not within the scope of this review, there is an appreciation that any changes to the PCS need to consider potential funding implications. For example, any new entrants to the university categories could conceivably gain access to public funds currently open to existing universities.

Considerations

A number of considerations are relevant to current discussions of the PCS. These are highlighted to help stimulate discussion for this review. It should be noted that the review is not limited to these considerations alone and interested parties are encouraged to share their perspectives on these or any other matters they consider relevant to this review.

Australia's conceptualisation of a 'university'

The established norm of what it means to be a university in Australia is embedded in the PCS, with the undertaking of research and scholarship (to inform teaching) a clear delineating requirement for the university categories.

To be a 'university' under the PCS, an institution must undertake research that leads to the creation of new knowledge and original creative endeavour, and demonstrate sustained scholarship that informs teaching and learning.⁶ The 'Higher Education Provider' category requires providers to be active in research only when engaged in research student supervision and requires academic staff to be active in scholarship that informs their teaching.⁷

Australia has come to conceptualise universities as places for both teaching and research. These two fundamental features have become synonymous with the title 'university' and have contributed to the good reputation of Australia's universities internationally for high quality teaching and research.

International comparison

The expectation that universities are distinguishable from other types of higher education provider by combining teaching with research activity is widely held internationally. However, Australia is somewhat unusual in codifying the types or scale of research activity necessary to be classified as a 'university' – that is, original research being undertaken in at least three broad fields of study in which higher degrees by research are awarded. This does not preclude other non-university providers undertaking research; indeed, there is a trend towards increasing research activity in these providers as the amount and ambition of non-university higher education provision increases globally.

The 'university' title is used in different countries in similar but often distinct ways. The prominence of research in universities varies, with some well-known international universities having relatively modest research programs, with many others highly research intensive. In certain national systems the leading research institutes are very distinct from universities. Also, in some countries, such as New Zealand, universities must meet international standards of research. Elsewhere, for example in the United States, the 'university' title is self-asserted by the institution in the absence of regulatory authority. While by no means universal, the most common international feature is that the 'university' title is granted by an education regulator or ministry of education as part of the process of classifying institutions and that universities are granted greater autonomy than other types of institutions.

⁶ *Higher Education Standards Framework 2015*. Part B1.2.3 and B1.2.5.

⁷ *Higher Education Standards Framework 2015*. Part B1.1.4.

Teaching-research nexus and rethinking the research requirement

“Part of the rationale for universities undertaking both research and teaching functions is the ‘teaching-research nexus’ — the theory that close proximity to world-class researchers makes students more engaged, develops their critical thinking, aids their research skills and keeps them up to date with the latest research findings”.

Productivity Commission (2017) *Shifting the Dial: 5 Year Productivity Review*⁸

The Bradley Review supported these defining characteristics of what it means to be a university in Australia, advocating that “the link between teaching and research is a common feature of respected universities internationally” and “while it is difficult to find compelling research evidence which unequivocally supports the argument that graduates with degrees from such institutions are demonstrably better than those from teaching-only institutions, it would not be in Australia’s best interests to ignore the weight of international opinion and practice on this issue”.⁹ The Bradley Review proposed that “there is an important difference between institutions which disseminate existing knowledge and those which also create new knowledge through research in various forms, which should be reflected in the title of the institution”.¹⁰

“Institutions with a strong culture of research are better placed to ensure that students receive maximum benefit from research-informed teaching which assists them to acquire a sophisticated understanding of their subjects and to recognise the importance of continuing to update their knowledge and skills”.

Bradley, D. (2008) *Review of Australian Higher Education*¹¹

The requirement for universities in Australia to undertake research remains one of continuing interest. Sometimes the matter is viewed through the lens of differential funding possibilities. Related to this are the current incentives for universities to support research through teaching revenue, particularly from international students. Another factor is the inextricable link between research and university standing, particularly where international university rankings are weighted significantly by research performance. There is also contention about the strength of the teaching-research nexus in practice, with commentators often pointing to a lack of evidence supporting the relationship between research and teaching quality, student experience or employment outcomes.

A 2017 Productivity Commission Review explored a range of issues associated with the teaching-research nexus. This included factors such as: the eminence and prestige research brings to universities; the potential barrier to new entrants becoming universities due to the expense of conducting research; the competitive advantage research affords to existing institutions in Australia’s university-centric market; and the impression that teaching quality is not rewarded, with the career development of academics depending “more on their research results and publication numbers than

⁸ Productivity Commission (2017) *Shifting the Dial: 5 Year Productivity Review*. Report no. 84. Canberra. p.108.

⁹ Bradley, D. (2008) *Review of Australian Higher Education*. p.124.

¹⁰ Ibid. p.125.

¹¹ Ibid. pp.124-125.

on their teaching ability”.¹² Indeed, the Productivity Commission review found “little empirical evidence that a positive teaching-research nexus exists (particularly at the undergraduate level)” and “no compelling policy rationale for requiring high-quality providers to conduct research in order to be able to label themselves as a ‘university’”.¹³

“That universities must foster excellence in research is unquestioned. However, universities are in the unique position of not just generating ideas that push out the boundaries of knowledge, but in also transferring that knowledge to students — a diffusion role that is not subject to the same level of status as research.”

Productivity Commission (2017) *Shifting the Dial: 5 Year Productivity Review*¹⁴

Public discourse on the current requirements on universities under the PCS also present other considerations. For example, should the requirement for universities to offer both undergraduate and postgraduate courses be relaxed, allowing freedom for a university to specialise in only undergraduate or only postgraduate courses, with or without research, as appropriate? Should specialised research institutes with a proven record become eligible to use the ‘university’ title and even offer postgraduate research-based qualifications? While this review presents an opportunity to explore all possible options, the implications of any change must be carefully weighed, particularly where change may have consequences for reputation and outcomes.

DISCUSSION QUESTIONS

1. **What characteristics should define a ‘higher education provider’ and a ‘university’ in the PCS?**
2. **Are the PCS fit for purpose in terms of current and emerging needs? Why?**

Signalling differentiation

Australia’s higher education sector continues to evolve as providers seek to meet the needs of students, industries and communities – locally, nationally and internationally. Ensuring the highest quality across an increasingly diverse higher education system is a challenge for the nation – but one that has far-reaching consequences if not upheld. The PCS act as a market signal for provider activity and quality. Australia’s robust quality assurance arrangements, including strict requirements to use the ‘university’ title, help to assure Australia’s reputation globally for high quality higher education provision and delivery, safeguarding its strong reputation and international standing.

¹² Productivity Commission (2017) *Shifting the Dial: 5 Year Productivity Review*. Report no. 84. Canberra. p.104.

¹³ Ibid. p.108.

¹⁴ Ibid. p.105.

However, the real differentiation of Australia's higher education sector might not be reflected in the PCS. Currently a single 'Higher Education Provider' category covers 127 different higher education providers.¹⁵ Consequently, the opportunity for higher education providers to demarcate their position through the PCS and signal their point of difference, specialisation, or excellence against other higher education providers may not be possible. By categorising all higher education providers together, broad minimum requirements become the focus. This is as opposed to the possibility of additional requirements to distinguish and incentivise differentiation and excellence.

For example, could pathway colleges linked to a 'university' and offering AQF Level 5-6 courses be classified as a standalone category of higher education provider? Additionally, should higher education providers that have reached the highest levels of confidence by TEQSA in their self-assurance and self-assessment capability be eligible for a new category (and title) which allows unlimited self-accrediting authority?

Another consideration is whether the PCS need to take account of varying activity and quality of a single provider. For example, the learning experience of a student at a main university campus may be very different to a smaller 'city building block' campus of the same institution. Is it acceptable to advertise this as a 'university' experience? With approximately 1.5 million higher education students enrolled in Australia, and around 90 per cent of those enrolled in universities, the sector should be aware of the lens through which students view institutions.

DISCUSSION QUESTIONS

- 3. Should some categories be eliminated or new categories be introduced? What should be the features of any new categories?**

Optimising the PCS

The PCS currently comprise six categories, including five university categories and one category for non-university providers. However, in practice two of the six categories predominate – the 'Australian University' category and the 'Higher Education Provider' category. There is one 'Australian University of Specialisation' and there are currently two providers in the 'Overseas University' category. Little to no take-up of the other university categories raises questions as to their utility, or even whether they should remain.

Progression categories

Under the PCS there have been no successful applications to date in the 'Australian University College' category. This category was established to provide a transitional category for a higher education provider with realistic and achievable plans to become an 'Australian University' within five years. Reasons for lack of utilisation of this category need to be understood.

One issue may be that there is a potential mismatch of requirements involved. On the one hand, the 'Australian University College' category has a requirement to self-accredit and deliver Masters Degrees (Research) and Doctoral Degrees (Research) in at least one broad field of study. On the other hand, the 'Australian University' category requires providers to have been authorised for at least five years to self-accredit 85 per cent of their courses, including research degrees in at least

¹⁵ TEQSA National Register summary table (accessed 03/12/2018 from www.teqsa.gov.au/national-register).

three broad fields of study. In other words, this aspect in the 'Australian University College' category is potentially misleading if the purpose of the category is to facilitate transition to the 'Australian University' category.

Another consideration is how the PCS could support higher education providers to follow their path of development through a logical progression of stages, and to remain at each stage for as long as they need to be without having to move to the next stage unless they are ready. For most providers, there is likely to be a very large leap between the stage where they are registered in the 'Higher Education Provider' category and have limited self-accrediting authority, to that where they have to meet all the research, community service and student services requirements of an 'Australian University'. The intersection with public funding frameworks makes this leap even more difficult for most.

'Greenfield' universities

The PCS currently contain no provision for 'greenfield' universities. The term 'greenfield' in this context would refer to an entity which has not been registered by TEQSA as a higher education provider and seeks to apply directly for university status. For example, this could include an overseas university seeking to be recognised under the 'Australian University' category or a new university established by a state or territory government. In this regard there could be significant challenges within the PCS, which currently limit the feasibility of such an application.

While the earlier National Protocols allowed 'greenfield' universities to operate on a provisional basis for up to five years, this option does not exist in the current PCS. It might prove difficult within the current framework for a provider that only 'plans' to meet standards (rather than is already meeting them) to be registered with TEQSA. 'Greenfield' universities are required to have the capacity, financial resources, and staff numbers to prove that they meet the minimum criteria for entry into the sector including being active in research and scholarship. This set of requirements may present problems for a 'greenfield' university not already in operation. To address this situation, should consideration be given to allow newly-approved 'greenfield' universities to operate in compliance with a sub-set of requirements as they scale up to full operation?

Overseas universities

A distinctive feature of the PCS is that they include discrete categories for overseas universities, providing opportunity for reputable institutions that can meet Australia's robust quality standards to operate on our shores. This provision projects an important signal to the world – that Australia is willing and confident to open its doors and work alongside (and in competition with) the best in the world. However, Australia's success in both attracting and retaining high quality overseas universities to operate campuses in Australia has been limited. Examining factors that may be viewed by reputable overseas universities as challenges, barriers, disincentives and risks to such investment in Australia is thus a relevant matter if the PCS are to retain categories designed to cater to such institutions.

Criteria for self-accreditation

Higher education providers may seek approval from TEQSA for authority to self-accredit some or all of their courses of study. The ability to self-accredit courses either on a 'limited' (confined to specific fields or levels) or 'unlimited' (applying to all current and future courses in any field or level) basis is a possibility for all higher education providers under the PCS and compulsory for all providers in the university categories.

The limited self-accreditation authority criteria largely amount to demonstrating a reliable history of course approvals, combined with meeting a select group of standards. The criteria for unlimited self-accreditation authority include more demanding requirements to be demonstrated:

- capability to plan, establish and accredit courses in new broad fields
- capacity for competent academic governance oversight and scrutiny of the accreditation of courses in new broad fields
- breadth and depth of academic leadership, scholarship and expertise to guide entry into and sustainable delivery in new broad fields.

The criteria for unlimited self-accreditation authority can present difficulties from a regulatory perspective, in that the criteria are designed in such a way that TEQSA is required to assess a provider's capacity to undertake future events, rather than demonstrating a history of capability.

Quantity and quality of research

The PCS do not currently define the quantity or quality of research required within each broad field of study to justify 'university' status. On the narrowest interpretation, to achieve 'Australian University' status a provider could demonstrate the requirements by providing a single undergraduate and postgraduate course and undertaking a single research project in each of the three required fields in a given year, and publication of at least one paper from each project in any form, and at any level of quality. This scenario may not meet community expectations of what a university should deliver, but it is plausible that a provider so described would satisfy the current PCS requirements. Additionally, the PCS do not define scholarship and what constitutes 'sustained' scholarship. There are many forms in which scholarship can take place, including the scholarship of discovery of new knowledge, integration, application, and teaching.¹⁶

Through this review, interested parties are invited to identify existing strengths and deficiencies of the PCS and propose detailed suggestions as to how it may be optimised in the context of these and other issues.

DISCUSSION QUESTIONS

- 4. Do specific categories need to be revised? How?**
- 5. How would the needs of providers, students, industry, regulator and broader public interest be served by your suggested changes to the PCS?**

¹⁶ Boyer, E. (1990) *Scholarship Reconsidered: Priorities of the Professoriate*. Carnegie Foundation. p.16.

Submissions

Written submissions for this review are open to all interested parties. The reviewer invites you to put forward your ideas, as pithily as possible, and provide the evidence and insights that underpin them.

This paper proposes five discussion questions to help guide responses. Submissions are not limited to these discussion questions and may address any issue and suggested alternatives relating to the current PCS.

Discussion questions

- 1. What characteristics should define a ‘higher education provider’ and a ‘university’ in the PCS?**
- 2. Are the PCS fit for purpose in terms of current and emerging needs? Why?**
- 3. Should some categories be eliminated or new categories be introduced? What should be the features of any new categories?**
- 4. Do specific categories need to be revised? How?**
- 5. How would the needs of providers, students, industry, regulator and broader public interest be served by your suggested changes to the PCS?**

Making a submission

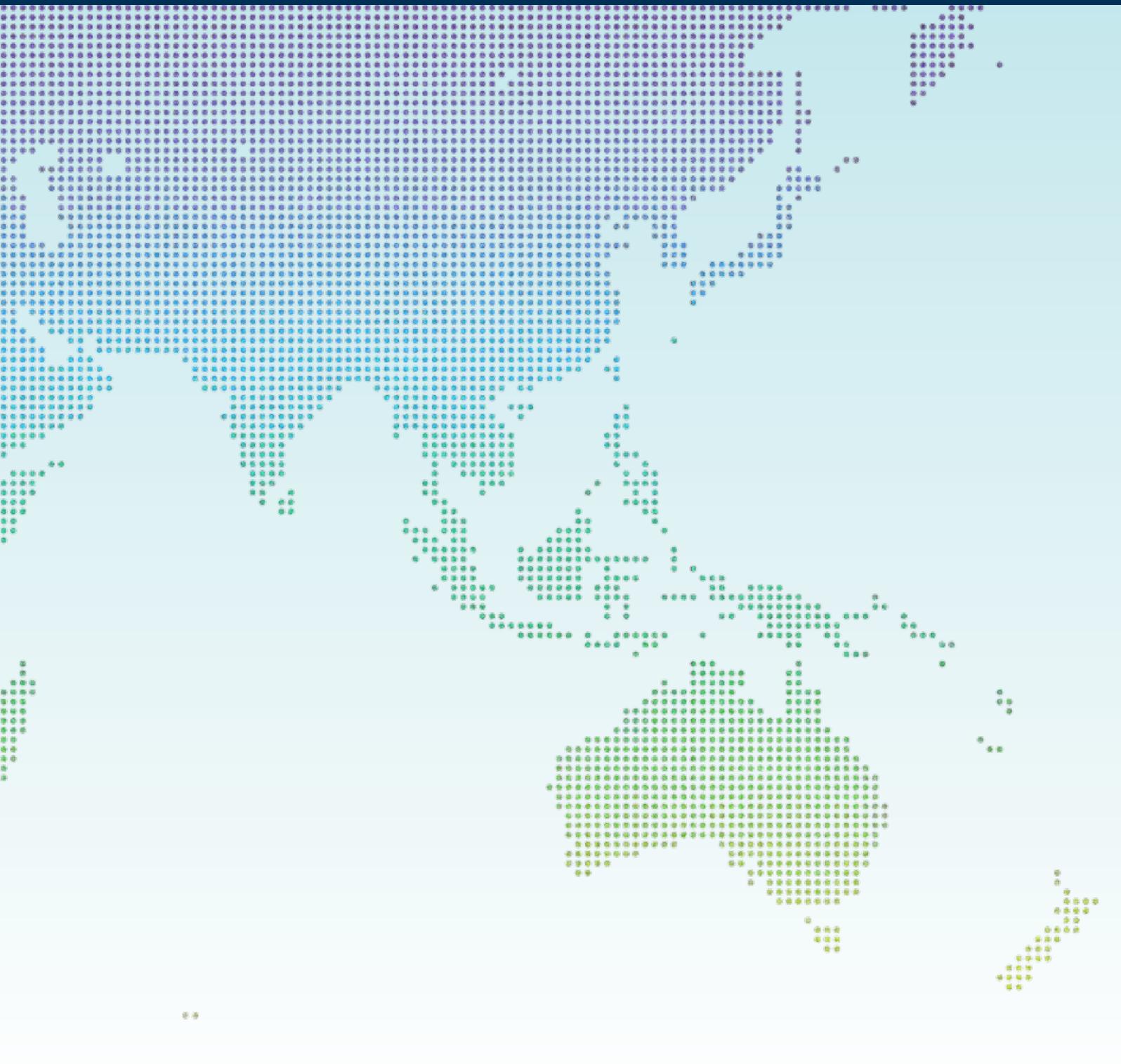
Submissions will close at 5.00 pm (AEST) on 8 March 2019 and should be emailed to PCSReview@education.gov.au.

Please note that the Australian Government Department of Education and Training will not treat a submission as confidential unless requested that the whole submission, or part of the submission, be treated as such. Publication of submissions will be subject to HESP approval.

For more information on this review, the HESP and to access a copy of this discussion paper, please visit www.education.gov.au/higher-education-standards-panel-hesp-0.



National Strategy for International Education 2025





Australian Government

National Strategy for International Education 2025



April 2016

Some of the case studies in this strategy are also featured in *World-leading research in Australia's universities* (March 2016), produced by Universities Australia with funding from the Australian Government Department of Education and Training.

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The document must be attributed as the *National Strategy for International Education 2025*.



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“I miss Australia. I miss the peace of Brisbane, the amazing food of Sydney, the wonderful galleries and museums of Melbourne, the splendid scenery of the Gold Coast and last but not least my dear friends and professors at UQ.

I can still remember clearly the noises possums make at the top of my house in the evening and the awful taste of vegemite... no offence. And the delicious corned beef I had on the farm.

I could tell you stories of my Aussie adventure all day and all night but today I want to talk about three words that impressed on me most when I was there. That is diversity, potentiality and family.

Diversity. In class my professor always emphasised the importance of diversity, whether in human resource management or trade and business. Globalisation and localisation has been the core of our case studies. People in Australia treat difference with respect.

Potentiality. “Why not just try?” My foreign friends in Australia always tell me this. In the past it was hard to imagine I could complete a 3000 word essay with critical thinking and high formality but I achieved this... I got the highest mark.

Family. I have been taken care of by my Australian families, professors and friends. Even the bus drivers, the cashiers, and the strangers doing morning exercise always said hello to me with big smiles.

All in all, I believe this colourful, wonderful, amazing experience will be my life treasure.”

Excerpt from a speech delivered by Ms TAO Xiaolei, senior student from the School of English for International Business, Guangdong University of Foreign Studies. 15 April 2016



Minister's foreword

The development of Australia's first *National Strategy for International Education 2025* highlights the importance of international education to Australia. Recognised as one of the five super growth sectors contributing to Australia's transition from a resources-based to a modern services economy, international education offers an unprecedented opportunity for Australia to capitalise on increasing global demand for education services.

The intent of the strategy is to ensure Australia remains a leader in the provision of education services to overseas students. Australia already has a well-deserved reputation for the quality of our education and research, however, to fully realise our potential we must be both strategic and ambitious.

To achieve this, we must build on our existing education, training and research strengths, to deliver high quality, innovative products and services to students that meet or exceed their expectations. This will enable us to withstand increasing competition and sustainably grow our market share, whilst maintaining the quality for which we are renowned.

The strategy particularly recognises the importance of innovation in achieving our goals, aligning our efforts with the Australian Government's *National Innovation and Science Agenda*. Although traditional forms of education will remain in high demand there are new and emerging forms of education where there are significant opportunities for both students and providers. These include blended delivery models, online professional development, and offshore and edu-tourism opportunities.

Collaboration and partnerships are also a key focus of this strategy. They can afford tremendous opportunity for expansion into markets that otherwise might be prohibitive, enabling smaller providers to achieve scale and broaden their education offerings. There is also a role they can play in promoting a continuum of education, encouraging students to progress through the Australian education system, transitioning from school to higher education or vocational qualifications or between providers.

This strategy, together with the long-term market development roadmap, *Australian International Education 2025*, signals the sector's and the government's commitment to work together to advance international education by identifying new products and new opportunities for expansion, and building on our current presence in existing markets.

In order to achieve this, it is critical that we embrace the role as a driver of change. We must be conscious of what our competitors are doing, particularly what they are doing better than us. It is vital we are honest about our shortcomings and proactive in addressing concerns when they arise. We must also remain cognisant of the needs and expectations of



Minister Colbeck visiting Jingshan School, Beijing, April 2016.

industry, tailoring our education product to meet changing requirements. The majority of the strategy will be driven by the education sector; however, there is a clear role for government in facilitating growth of Australian international education. Government must ensure that where there are interacting policy levers, such as with student visas and settings in trade agreements, our policies are mutually compatible and internationally competitive.

The strategy is the result of lengthy consultation with the sector, with the ideas and vision of education stakeholders brought together by the Coordinating Council for International Education. Their willingness to work together in developing this strategy is a testament to their commitment to the growth and development of Australian international education.

The Australian Government thanks the following sector expert members of the Coordinating Council for International Education for their leadership in developing this strategy:

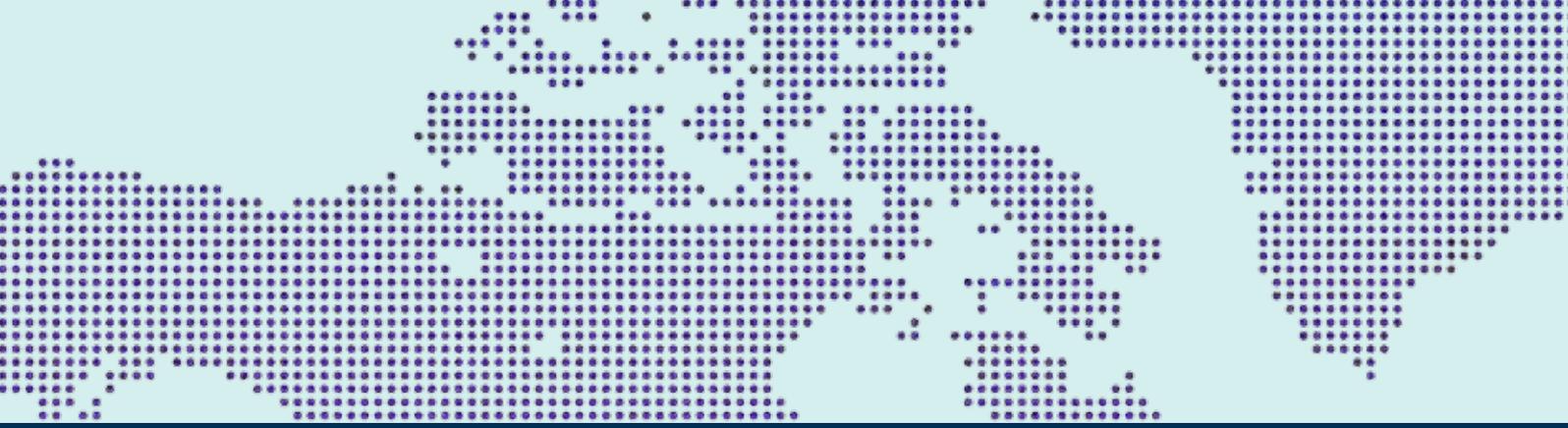
- » Ms Sue Blundell, former Executive Director, English Australia
- » Ms Kate Carnell AO, former Chief Executive Officer, Australian Chamber of Commerce and Industry
- » The Hon Phil Honeywood, National Director, International Education Association of Australia
- » Ms Belinda Robinson, Chief Executive Officer, Universities Australia
- » Mr Bill Spurr AO, Chair, Education Adelaide
- » Mr Malcolm White, former Acting Chief Executive Officer, TAFE Directors Australia.

To support the strategy's implementation, the government has announced the creation of an ongoing council. The council participants will represent a broad cross-section of Australian education stakeholders, and will have responsibility for the development of the implementation plan, to realise the ambitions outlined in this strategy.

As the first Minister for International Education I am proud to present Australia's first international education strategy. It is a vital step in developing this essential sector and will drive continued excellence and growth over the coming years.

Senator the Hon Richard Colbeck

Minister for Tourism and International Education



Executive summary

Australia's first *National Strategy for International Education 2025* sets out a 10-year plan for developing Australia's role as a global leader in education, training and research. The strategy and its goals and actions have been developed looking through three lenses: the benefits and opportunities for students, for Australia, and for the world. This balance is essential to ensure that we continue to meet the needs of students, business and industry while we grow.

Australian international education: now

Australian international education is a world-leading brand. Hundreds of thousands of students are attracted to Australia each year, and Australian teaching and research is delivered around the world. It provides high-quality education for students at all levels, from school through to higher education, vocational education and training and English language tuition. It is a valuable component of the Australian economy, and it builds capacity and networks for national and international business and industry. However, there continue to be significant opportunities to expand and improve our education offerings.

National Strategy for International Education 2025

The *National Strategy for International Education 2025* aims to build on the current success of the system to grasp new opportunities.

The strategy is built on three pillars:

- » Pillar 1—Strengthening the fundamentals
 - Goal 1: Building on a world-class education, training and research system
 - Goal 2: Delivering the best possible student experience
 - Goal 3: Providing effective quality assurance and regulation
- » Pillar 2—Making transformative partnerships
 - Goal 4: Strengthening partnerships at home
 - Goal 5: Strengthening partnerships abroad
 - Goal 6: Enhancing mobility
 - Goal 7: Building lasting connections with alumni

- » Pillar 3—Competing globally
 - Goal 8: Promoting our excellence
 - Goal 9: Embracing opportunities to grow international education.

The development of the strategy has been informed by consultation with sector stakeholders through the Coordinating Council for International Education.

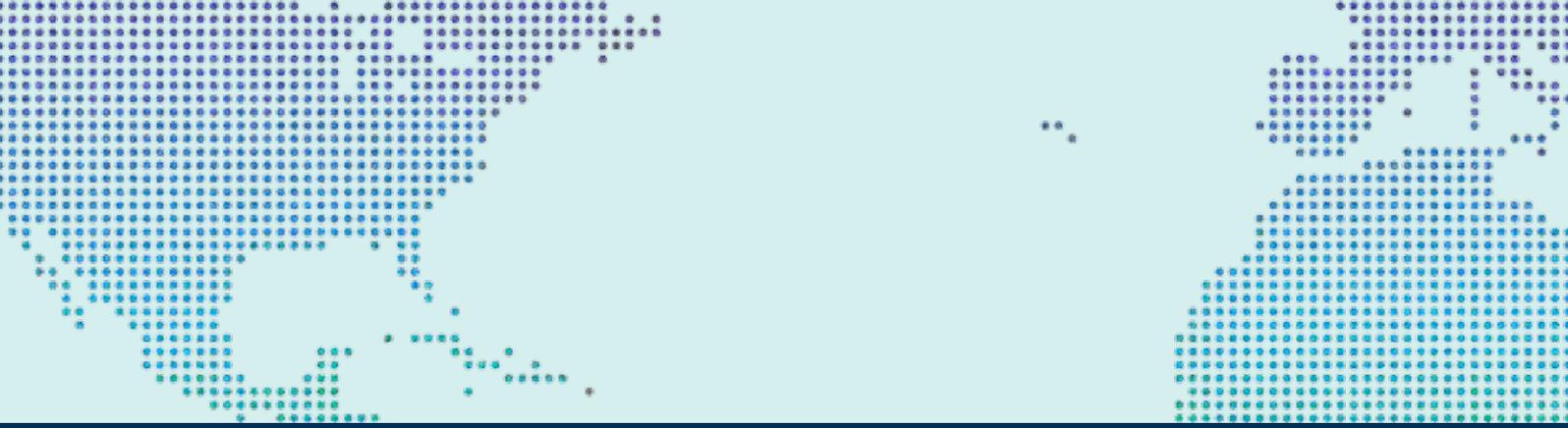
Strategy benefits and opportunities

The pillars, and their accompanying goals and actions, are designed to deliver benefits and opportunities for students, for Australia and for the world. Students will benefit from high-quality education, supported by effective industry links and student services. Australia will benefit from increased market share, connection with new and emerging markets, and stronger international relationships. The world will benefit from industry-ready graduates and increased capacity in education and research.

Australian international education: into the future

We have immense opportunities to grow Australian international education: new markets, new partnerships, new areas of teaching and research, new technology, and new modes of delivery. Our innovation will capitalise on technological advances to meet the needs of students and provide them with the skills needed by tomorrow's industries. New markets and partnerships will support delivery of Australian education across the globe. Most importantly, we will continue our commitment to the quality that is the essential foundation for all of these efforts.





Building on excellence

Australian international education

Australia has a state-of-the-art education system that delivers high-quality education and training products.

Australian international education encompasses all levels of the education system:

- » **Schools**—Australian schools support more than 3.7 million students each year, with a broad curriculum delivered by university qualified teachers. Focussing on growing our international student numbers at the school level will provide significant opportunities for continued engagement through further education.
- » **English language**—Australia provides English language teaching to students in Australia and in their own countries through formal in-country programs or distance education. For many students, this is a stepping stone to further study in Australia.
- » **Vocational education and training**—Australia’s vocational education and training system has been developed with industry to meet the needs of employers as well as students.
- » **Higher education**—Australia’s higher education system consists of 169 higher education providers, including 43 universities that attract international students, researchers and academics, and produces in-demand graduates.
- » **Research**—by a network of international collaborators.

Sector providers include those delivering student and teacher training, frameworks and content, education technology and software, and research and development.

Supporting all levels of education, Australia has rigorous quality assurance and student protection systems. We also have attractive visa arrangements to draw the best students and researchers to Australia, and to encourage work-study arrangements that increase industry experience and graduate employability.

Australia consistently ranks among the most popular study destinations for international students. In 2015, there were 498,155 students who chose to come to Australia to further their education. Australia is ranked third in the world for attracting international students in tertiary education, with around 6 per cent of the market, and we significantly outperform our competitors on a per capita basis.

Looking to the future

Global trends

Global trends can play a significant role in the international education market. Whilst some of these trends present a threat to growth, many also create real opportunities for those who are able to meet the needs of the market.

Increased global development and industrialisation, particularly within the Indo-Pacific region, will increase demand for skilled workers. Some countries face a significant shortfall.

An increase in incomes and a growing middle class, again within the Indo-Pacific region, is increasing demand for high-quality schooling and higher education with strong employability outcomes. Today's students also want greater choice in what, where, when and how they learn.

The global economy is driving increased mobility across the workforce, with many students, professionals and researchers relocating to take advantage of education, training, research and employment in other countries.

Improved technology is enabling the development of new modes of education delivery, including onshore, in-market and online. In-market and online delivery will broaden the reach of Australian education products.

Our competitors

The majority of the international market is serviced by a few countries, with the top six educating just over 50 per cent of all internationally mobile students. Australia's chief competition currently comes from the United States and the United Kingdom, who hold 19 per cent and 10 per cent of the market respectively, and we are closely trailed by France, Germany, Japan and Canada. Like Australia, these countries are also actively seeking to increase their market share.

In addition, emerging players like China and India are keen to expand their international education offerings, especially in higher education. They are also increasing their competitiveness in the market by offering courses in English. Just as Australian education providers look to opportunities offshore, these countries are also actively pursuing offshore delivery, including here in Australia.

Future opportunities

The increase in global education needs and the rise of new technologies represent significant opportunities for Australian international education to grow and compete.

Australia is well positioned to play a leading role in educating students to help meet the changing workforce needs of the global economy.

With employability a key driver for why students choose to undertake a particular course of study, there is a need for education providers to offer not only qualifications that give the skills desired by industry, but also work integrated learning opportunities that further boost the employability of graduates. Australian educators are working closely with industry to develop these products.



Keeping abreast of the developments in relevant countries is vital to realising our potential future growth. We need to accurately predict labour market opportunities where we can offer a quality education experience that meets the needs of local industries.

Many of these opportunities may occur offshore, and could also centre on capacity building, such as training the trainers, as well as providing direct training. Opportunities may also exist in the provision of less formal training, where the focus is on achieving competencies designed to address particular skills requirements, as opposed to a full qualification.

A 2015 report by Deloitte Access Economics, *Growth and Opportunity in Australian International Education*, commissioned by Austrade, identifies new and emerging priority markets. Growth is expected to continue to come from China and India, with the Philippines and Thailand also offering strong potential. The Australian Government has also identified China, India, Indonesia, Vietnam, South Korea, Malaysia and Hong Kong as important markets to pursue.

In-market delivery will broaden the number of students who can access Australian education products. This may occur through partnership arrangements with local providers, onshore presence of Australian education providers or through distance learning. Given the scale of the potential demand, Australian training providers may increase capacity through partnership or consortia arrangements with one another when entering these markets. The success of this strategy is dependent on stakeholders working together to grow our international education offerings.

With all of these opportunities, it is important to remember that they will only be realised if we continue our commitment to high quality. This is what attracts students and industry to us to meet their needs, this is what gives us access to new markets, and this is what will provide the basis for growth.

Melbourne's critical mass of biomedical excellence

The Parkville biomedical precinct and surrounds are home to around 10,000 scientists, clinicians and technical staff engaged in biomedical and health care research, practice and training. The research institutions include the University of Melbourne, Monash University, the Walter and Eliza Hall Institute of Medical Research, the Murdoch Children's Research Institute, the Florey Institute of Neuroscience and Mental Health and the Commonwealth Scientific and Industrial Research Organisation (CSIRO). This co-location facilitates research collaboration and organisations in the precinct, and researchers have created and commercialised many medical and technical innovations—for example, the bionic ear, retinal imaging, vaccines, diagnostics, microsurgical instruments and antibiotics.



Benefits and opportunities

For students

Through the strategy, we aim to improve student access to high-quality education, supported by effective industry links and student services.

The most recent International Student Survey (2014) indicated that 93 per cent of international students selected Australia as a study destination because of the reputation of Australian teaching institutions, the quality of teaching and assurance of their personal safety. Testament to the quality of Australian education is the number of international alumni of Australia who go on to become senior figures in their own countries.

Australian universities are ranked highly in terms of their international outlook, with 24 of our universities featuring in the 2015 Times Higher Education World's Most International Universities list. This list assesses the diversity of a university's student body and the extent to which its academics collaborate with international colleagues.

The strategy will build on these achievements. New modes of education delivery and new national and international partnerships will allow more students to have access to an Australian education. Although onshore learning in Australia will remain a core component of Australian international education, learning will increasingly occur in-market and online.

New visa arrangements and links with industry will prepare students for the workplace and improve employability. In 2013, changes were made to allow greater access to post-study work for international students who studied onshore in Australia. These post-study work visas enable international students to remain in Australia on completion of a higher education degree for 2–4 years—more than many other countries. In addition, we have announced changes to our student visa processing arrangements, making them simpler and easier to navigate.

For Australia

Through the strategy, we aim to increase market share, build connections with new and emerging markets, and develop stronger international relationships.

International education is currently one of Australia's top service exports, valued at over \$19 billion in 2015 (including fees and associated expenditure). The sector currently

supports more than 130,000 jobs in Australia. International education is forecast to be one of the main sectors on a high growth trajectory, acknowledging the significant increase in demand from middle-income economies with large and mobile youth populations.

The Deloitte Access Economics report, *Growth and Opportunity in Australian International Education*, projects that Australia's onshore enrolments will grow by around 45 per cent by 2025, which equates to Australia hosting around 720,000 students onshore. This growth presents significant opportunities.

India, for example, has indicated it seeks to train around 400 million people by 2022. Given the scale of this demand, there is great potential for Australian training providers to play a significant role in helping India to meet this target. The Australian Government is working closely with India to increase our trade and investment linkages and we have appointed an education ambassador to India to help promote our education services. China presents similar opportunities for Australia, with current student numbers representing only a fraction of the potential. The China-Australia Free Trade Agreement places us well to take advantage of this opportunity.

Our education and specific research strengths attract students, researchers, businesses and entrepreneurs to collaborate with Australia. This is particularly important in research and development, with international collaborations leveraging our research capacity and delivering valuable outcomes in a wide range of disciplines.

Whilst the majority of international students study in metropolitan areas, there are significant opportunities for growth in regional Australia. Education institutions in regional Australia provide considerable research strengths, especially in agriculture, marine science and tropical medicine. Study opportunities in regional Australia can provide tremendous experiences for international students, with tight-knit communities and often plenty of hands-on experience.

Importantly, we recognise that international education offers Australia far more than just economic benefits. It offers opportunities to build enhanced bilateral and multilateral relationships, which increase cultural awareness and social engagement. In addition, diplomacy is advanced through Australian educated alumni who develop lasting connections at personal, organisational and government levels. All of this is fostering better relationships with our regional neighbours and the rest of the world.

For the world

Through the strategy, we aim to increase the world's capacity in quality education and research and deliver industry-ready graduates in a range of disciplines.

Our location within the Indo-Pacific region places Australia in an ideal position to contribute to meeting the increasing need for education at all levels—schools, vocational education and training, higher education and English language.

Our technological innovations will allow delivery of such education around the world. Our research strengths and collaborative efforts in the technology space are providing answers to global economic, social and environmental challenges.



We are particularly focused on providing students with the skill sets needed for business and industry now and into the future. Links between education providers and industry are providing essential understanding and experience for a new generation of graduates. Our expertise in a range of niche areas can also be of particular value to emerging economies, and help to build their workforce capacity. Australia has specialist offerings in areas such as tropical medicine, agriculture, mining and marine studies.

We have a proven track record of leadership in the development of educational frameworks and curricula. For example, our vocational qualifications in leading services industries such as tourism and hospitality are highly regarded. Other countries look to our education systems as their guide to best practice.

Exporting Australian aviation to the world

Australia has a long and celebrated history of aviation excellence. This reputation and expertise has positioned an Australian training school to successfully deliver aviation qualifications in Saudi Arabia. Aviation Australia, in partnership with Shamel Commercial Investments of Saudi Arabia, established Aviation Australia Riyadh College of Excellence in late 2014. The college trains civil aviation engineers along with students from the Royal Saudi Air Force.

The course curriculum is taught in English and uses work integrated learning approaches. Training is conducted at a purpose-designed aviation training and maintenance facility at King Khalid International Airport in Riyadh. Students work on real and simulated aircraft at facilities that include a hanger and an aircraft maintenance environment. Students also receive on-the-job training at an aviation maintenance workplace. Graduates are awarded an Australian diploma that is endorsed by Saudi Skills Standards.

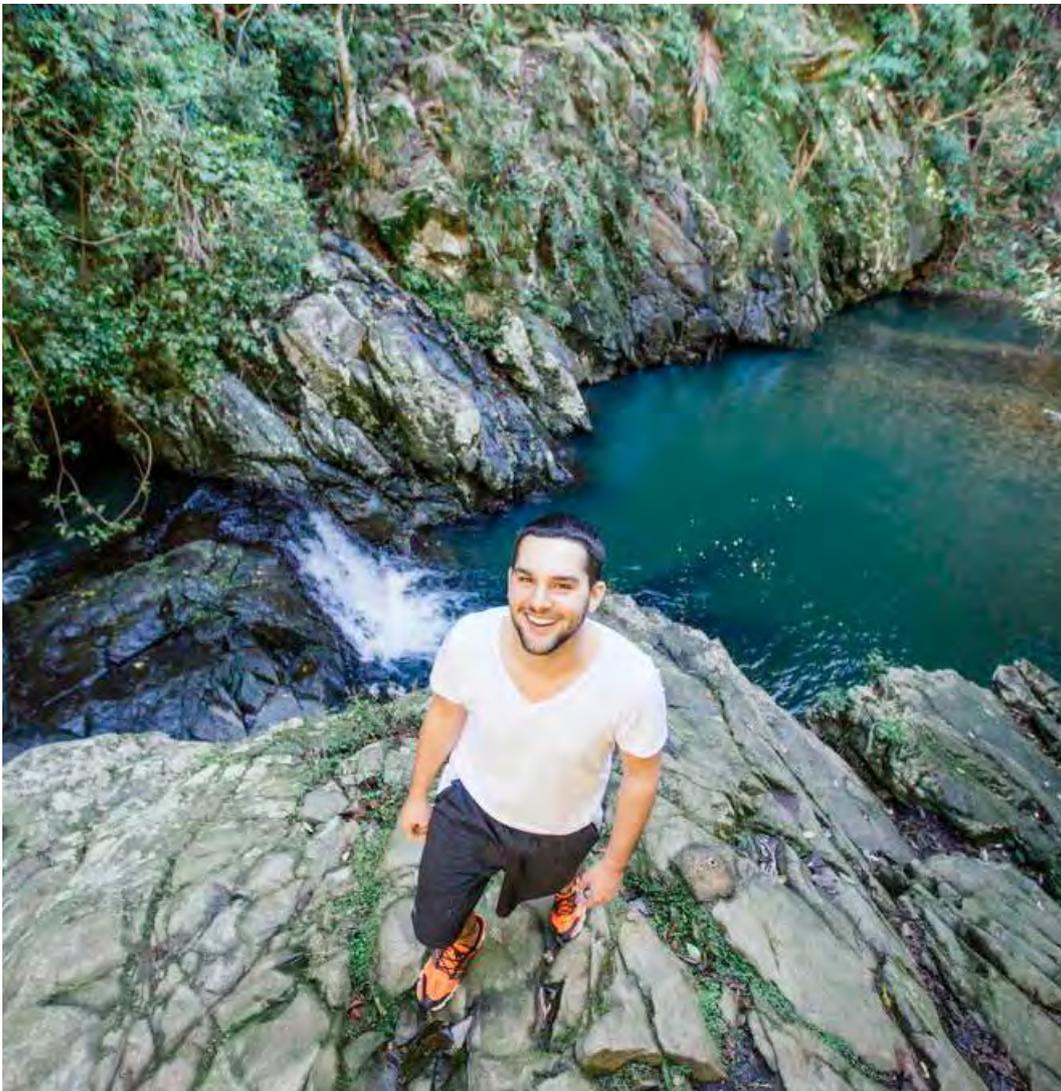
During training, the college supports the development of broad employability skills through guidance in the preparation of cover letters and resumes, interviewing skills and other job search related assistance.

SMART farming

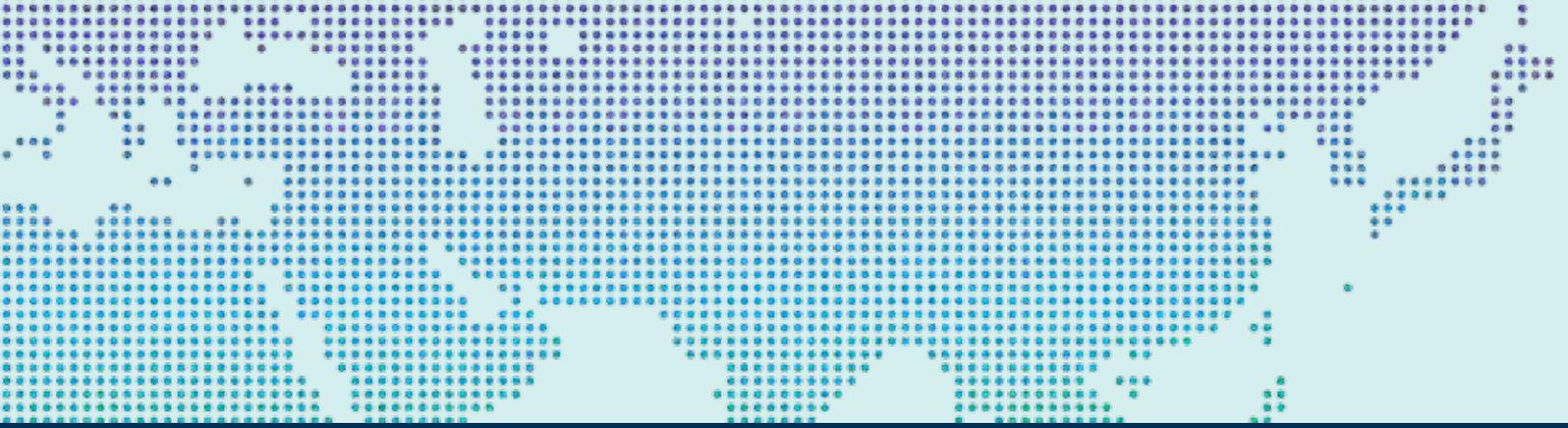
Researchers from the University of New England have developed the Sustainable Manageable Accessible Rural Technologies (SMART) Farm, which tests technologies developed to improve crops, pasture and livestock.

In a collaboration between the university, CSIRO, and numerous large and small enterprises, an array of sensors delivers data to create a living map of growing conditions, including soil moisture, plant growth, temperature, air humidity and winds. This information offers valuable insights into plant, soil and climate interactions at various scales, informing decisions such as when to fertilise, sow seed or move cattle. Farmers can also monitor animals through ear tags, giving them important health information such as when an animal is unwell.

SMART Farm data is also being used in Australian classrooms to inspire the next generation of agricultural scientists and farmers.



City of Gold Coast Student Ambassador, Mr Dylan Cooper from the United States of America, enjoying Australia's unique natural environment as part of his study experience.



The strategy

Intent: To ensure Australian international education helps students, communities and industry around the world, meeting their expectations.

Measures of success

Success in meeting the objectives of this strategy will be measured by:

- » benchmarking against international standards
- » the employability of graduates
- » quality of the student experience
- » increased international collaboration and alumni engagement
- » growth in market share from the current level of 6 per cent.



International students building personal and professional connections that will last a lifetime.

Pillar 1 Strengthening the fundamentals	Goal 1 Building on a world-class education, training and research system	Action 1.1: Developing Australia's role as a global leader in education, training and research Action 1.2: Setting nationally consistent approaches that support the Australian international education sector
	Goal 2 Delivering the best possible student experience	Action 2.1: Supporting students Action 2.2: Informing student choice Action 2.3: Preparing students for global engagement
	Goal 3 Providing effective quality assurance and regulation	Action 3.1: Maintaining strong quality assurance systems Action 3.2: Ensuring strong student protection
Pillar 2 Making transformative partnerships	Goal 4 Strengthening partnerships at home	Action 4.1: Engaging with the broader community Action 4.2: Encouraging better links with business and industry
	Goal 5 Strengthening partnerships abroad	Action 5.1: Building confidence through government-to-government engagement Action 5.2: Strengthening collaboration through institution-to-institution partnerships
	Goal 6 Enhancing mobility	Action 6.1: Supporting international mobility through practical visa settings and work arrangements Action 6.2: Expanding student, education and training professional and researcher mobility Action 6.3: Supporting graduates through qualifications recognition
Pillar 3 Competing globally	Goal 7 Building lasting connections with alumni	Action 7.1: Engaging alumni
	Goal 8 Promoting our excellence	Action 8.1: Promoting Australia as a high-quality international education provider
	Goal 9 Embracing opportunities to grow international education	Action 9.1: Building on innovative education and training services to meet student and employer needs Action 9.2: Promoting opportunities in regional Australia Action 9.3: Identifying and responding to new opportunities



Pillar 1

Strengthening the fundamentals

Australia's international education system delivers education, training and research for students, business and industry around the world. This well-regarded system is based on some fundamental structures and principles.

We aim to deliver the highest quality education. We have high-calibre institutions, expert teachers and innovative researchers, and strong quality assurance for all stages of the learning journey through schools, vocational education and training, English language, higher education and research.

We value our students and strive to offer them an unmatched study experience. Pioneering student protection arrangements are designed to safeguard international students by setting out national standards for student recruitment, course quality and delivery.

This first *National Strategy for International Education 2025* confirms our commitment to strengthening the fundamentals through a national approach. To remain a provider of choice for international students, it is crucial that we continue to evolve and improve our education offerings, and that we are committed to meeting our students' needs, and remaining relevant to the industries and societies of the future.

Goal 1: Building on a world-class education, training and research system

Australia will build on our education, training and research system to ensure it remains among the best in the world.

Action 1.1

Developing Australia's role as a global leader in education, training and research

Australia's excellence in education, training and research translates to benefits and opportunities for students, for Australia and for the world. We equip students with the skills, knowledge and attitudes to be productive, globally aware citizens who can confidently respond to the challenges of tomorrow.

Innovation is vital to further develop our role and expand our market. New and attractive education products and services that capitalise on technological advances will meet the needs of new students and provide them with the skills needed by industry in the future. Learning will increasingly occur in-market and online, as well as onshore. New partnerships will support delivery of Australian education across the globe.

Australia will:

- » embrace best practice in all aspects of education, training and research
- » continue to develop a diverse, flexible and innovative education and training system
- » develop and support innovative education products and services.

Action 1.2

Setting nationally consistent approaches that support the Australian international education sector

This strategy recognises the importance of the sector, highlights the opportunities available and the actions to take advantage of them, and promotes coordination between all stakeholders.

The strategy has been developed through a coordinated national effort. This shared approach for Australian international education reflects the views of the education sector, business and industry, and governments.

Ongoing, regular engagement between governments, peak bodies, education providers, business and industry, students and the broader community will encourage the sharing of ideas and intelligence to align our activities and ensure consistent policy settings across jurisdictions. By harnessing and coordinating our resources, we will deliver Australian international education that meets and exceeds the expectations of students and their employers.

Australia will:

- » work together to set nationally consistent approaches that support the Australian international education sector
- » engage with all levels of government and other stakeholders in key international education initiatives.

Goal 2: Delivering the best possible student experience

Australia will provide a rewarding experience for international students.

Action 2.1

Supporting students

Students need a supportive and enabling environment to reach their full potential. Further developing student supports will ensure that students have the assistance they need to perform academically and make meaningful social, professional and cultural connections.



Ms Fitri Widiyanti of Indonesia studied Medical Science at Flinders University, South Australia as a recipient of an Australian Government Endeavour Postgraduate Award. The Australian Government is committed to supporting international capacity building.

Australia is a sought-after destination and provider of international education. We are highly regarded for the experience we provide for students, evidenced by the fact we are the world's third most popular destination for international tertiary students.

We will look for new ways to deliver and improve support services, affordable and convenient accommodation and public transport. We will also facilitate work opportunities. International students can work while studying and apply for a work visa following completion of their study. These arrangements support professional opportunities and contribute to the development of international networks. Experience gained through working in Australia is highly regarded internationally.

As part of our improvement processes, we will listen to international students to ensure that their needs are met. There are student representative bodies at the institutional, state and national levels, and we aim to work together with them to continually improve the student experience.

Australia will:

- » deliver support that meets or exceeds international student needs
- » build capacity for international student employment
- » encourage a strong international student voice and continually improve our performance based on student feedback.

Action 2.2

Informing student choice

Accurate and up-to-date information is key to ensuring students, parents and sponsors make informed choices.

Australia excels in the provision of reliable information through a variety of media, including online portals by institutions and governments. Information from robust data collection and analysis, including graduate employment outcomes and student satisfaction surveys, drives continuous improvement and is accessible through public websites such as Quality Indicators for Learning and Teaching. Students also have access to quality careers advice and links with employers throughout their learning journey.

We will provide more in-depth information and analysis that is relevant and useful to international students and their families. New sources of information, such as the Future Unlimited website, will complement existing portals.

Australia will:

- » provide accurate and relevant information to prospective, current and graduate students
- » provide quality careers advice throughout the learning experience.

Action 2.3

Preparing students for global engagement

All sectors—business, industry, academia and government—now require a highly mobile, highly competent workforce that is culturally aware and has strong problem-solving skills.

Australia's student-centred approach to teaching encourages students to be self-directed, critical thinkers. At the same time, our multicultural society, highly internationalised institutions and international outlook, along with programs that encourage foreign language learning and intercultural awareness, foster the acquisition of cultural competencies. Work integrated learning and work experience, such as internships and volunteerism, prepare students for the workplace. These factors interact to produce graduates with the skills, knowledge and attitudes necessary for success in the global labour market.

The employability of our graduates will be a key measure of success against Australia's goal to be the global leader in education, training and research. We will focus on developing employability and opportunities for work integrated learning, enhancing the nexus between education and employment.

Australia will:

- » provide work experience opportunities that prepare students for the global labour market
- » deliver highly employable, globally in-demand graduates.

Goal 3: Providing effective quality assurance and regulation

Australia will support our education system with a robust quality assurance and regulatory environment with a focus on continual improvement.

Action 3.1

Maintaining strong quality assurance systems

Robust quality assurance is critical to delivering a high-quality student experience and maintaining Australia's reputation in international education. Australia's quality assurance system supports integrity and ensures confidence in Australian qualifications.

Australia has independent national regulators for vocational educational and training, higher education and English language education, as well as state and territory-led regulation in the schools sector. The system is underpinned by legislation and based on strong partnerships between regulators, governments, industry and providers. It covers all modes of delivery, including online, distance, onshore and offshore.

All education providers that offer courses to international students studying in Australia on a student visa are required to be on the *Commonwealth Register of Institutions and Courses for Overseas Students*. To register, a provider must demonstrate their compliance with the *National Code of Practice for Providers of Education and Training to Overseas Students*. The code is legally enforceable, further protecting the rights of international students.

Australia's education quality will continue to be strengthened by our national regulators working with education providers and peak bodies through internal and external quality assurance mechanisms.

Australia will:

- » continue to espouse the highest standards of quality in the delivery of education and training
- » lead and promote world's best practice quality assurance.

Action 3.2

Ensuring strong student protection

Strong governance frameworks ensure that international students receive the courses and the quality education they expect, protecting both the students and Australia's international reputation.

Australia has one of the strongest and most effective student protection arrangements in the world, with safeguards for students at every stage of their education.

The *National Code of Practice for Providers of Education and Training to Overseas Students* sets out standards for Australian education providers in student recruitment, and in the delivery and quality of courses. Australia has also adopted the *Statement of Principles for the Ethical Recruitment of International Students by Education Agents and Consultants* (the London Statement).

The *Education Services for Overseas Students Act 2000* (the ESOS Act) was introduced to specifically protect the rights of international students. It ensures quality education products are delivered and supports the integrity of the student visa program. Tuition protection provided under the ESOS Act also means students can complete their studies in another course or with another education provider, or receive a refund of their unspent tuition fees, if a provider is unable to fully deliver a course. Australia's Overseas Student Ombudsman provides free, independent and impartial complaint services to international students in private education and training.

We will maintain our high standards and ensure there are always strong student protections in place.

Australia will:

- » demand the highest levels of professionalism and integrity in the recruitment of international students
- » continue to set world standards in international student protection.

Innovation in exploration

Western Australia is home to the largest group in the world focused on innovative research and development in mineral exploration and resource management. The Centre for Exploration Targeting is a unique applied research enterprise working on cost-effective, high-quality mineral exploration. The Centre is a collaboration between the mineral exploration industry, the University of Western Australia, Curtin University and the Government of Western Australia.

Over 60 national and international companies integrate with the centre, providing a gateway to mining and minerals opportunities worldwide for students and early career researchers. It is an appealing destination for both international researchers and students and is delivering research results that are increasing the rate and the quality of discoveries made in mineral exploration.



Ms Courtney Vagg, a VET student from St Stephen's School in Western Australia. Industry engagement and work-ready graduates are a hallmark of Australia's vocational education and training sector.

Vocational education and training in the Indian Ocean region

St Stephen's School is the largest vocational education and training (VET) in schools provider in Western Australia, awarding more than 700 VET certificates per year. VET delivered as part of a school curriculum combines industry-recognised competencies, skills and knowledge with sound educational practices. This approach prepares students for an ever-changing work life with transferable, globally relevant skills.

St Stephen's is now building partnerships throughout the Indian Ocean region to deliver VET. As part of its global strategy, St Stephen's has established its own registered training organisation called St Stephen's College. Drawing on its VET in schools expertise, the college will offer VET certificates to students throughout the Indian Ocean time zone as well as locally, by using enhanced digital delivery methods.

International students enrolled in a St Stephen's College course can study an Australian qualification while remaining at home. These qualifications are portable, flexible and transferable, and will provide pathways to further study and the global labour market.

St Stephen's provides these options to build regional capacity and enhance opportunities for school students, whether they are studying in South Africa, Tanzania, India, China or Australia.



2

Pillar 2

Making transformative partnerships

Genuine ongoing partnerships between Australian business and industry are critical to the success and competitiveness of Australian international education. Cooperation can enhance graduate employability outcomes, support productivity and growth, improve research investment and output, and encourage technology and innovation transfer.

The Australian Government has entered into free trade agreements with China, South Korea and Japan. These agreements will play an important role in increasing the flow of students between our nations and we will seek to include similar provisions in other free trade agreement negotiations.

In addition to our free trade agreements, the Australian Government has actively sought to enter into memoranda of understanding and other cooperative arrangements with other countries.

We are seeing increased collaboration and partnerships between educational institutions, not just at the tertiary level through research agreements with universities, but increasingly earlier in the education pathway, with sister school arrangements. To help promote these arrangements, the Australian Government was instrumental in establishing the *Building Relationships through Intercultural Dialogue and Growing Engagement* (BRIDGE) program, which connects Australian teachers, students and school communities with their counterparts across Asia.

We also recognise the value of the partnerships formed with our global alumni. They make a significant contribution, helping build a firm foundation for future trade and business growth and enhancing cross cultural understanding and relationships. The *Australia Global Alumni Engagement Strategy* recognises the importance of our talented and diverse global alumni community and fosters lasting, genuine relationships.



International students enjoying a well-deserved study break. Visiting family and friends of international students contribute to Australia's tourism and hospitality sectors.

Bringing the world into Australian and Chinese classrooms

In 2014, a year five class at Scotch Oakburn College in Launceston, Tasmania, wrote to President Xi Jinping, inviting him to visit Tasmania. The President and his wife took up their offer and included Tasmania on their itinerary. During this trip they met with students from Scotch Oakburn.

President Xi Jinping and his wife extended a reciprocal invitation to the students from Scotch Oakburn College, and in 2015, students and staff visited Jingshan School in Beijing. The two schools have now formalised an exchange relationship, enabling students from each school to experience life in another country.

During a visit to Jingshan School in April 2016, Minister Colbeck met with some of the students and teachers who will be travelling to Scotch Oakburn College later in 2016. The students from Scotch Oakburn had prepared a video in Mandarin, welcoming their Chinese exchange partners to Australia.

The ethos of Jingshan School came from the former President of China, Deng Xiaoping when he said *"Education should be geared toward modernisation, toward the world and toward the future."* These words have prevailed as the driving force for education reform in China to this day.

Box Hill Institute—a leader in global engagement

Box Hill Institute in Victoria hosts around 800 international students from 50 countries and territories to study in Australia. With a strong history of international engagement, Box Hill was the winner of the 2015 Victorian International Education Award for Excellence in International Education—TAFE.

Delivering courses to more than 5000 students around the world, in conjunction with international campus partners in China, Kuwait, Malaysia, Saudi Arabia, Singapore, the United Arab Emirates and Vietnam, Box Hill makes transformative partnerships every day.

Box Hill has also harnessed the opportunities of borderless education by establishing in 2007 Box Hill College Kuwait (BHCK).

BHCK is the sole private institute in Kuwait delivering higher education in-country exclusively for women. Programs are accredited under the Australian Qualifications Framework and by the Kuwait Private Universities Council and Kuwait Ministry of Higher Education. With a strong commitment to creating a quality learning environment, BHCK is identifying and responding to new opportunities by preparing women in Kuwait for employment and further study.

Goal 4: Strengthening partnerships at home

Australia will encourage local community and business and industry engagement to maximise the benefits of Australian international education for students, communities and businesses.

Action 4.1

Engaging with the broader community

Australia has a diverse international student population. This diversity provides us with a unique opportunity to build friendships, cultural understanding, respect and ongoing relationships. Engagement between international students and Australian local communities is pivotal to a positive student experience. Local governments and sporting and community groups help to build connections with international students and benefit from student diversity. Communities with which international students share a common language and heritage also offer important support.

International students make an invaluable contribution to our society. We will continue to encourage greater engagement between students and the communities in which they reside.

Australia will:

- » recognise, celebrate and communicate the benefits that international students bring to Australia
- » develop and share best practice approaches for connecting international students with communities.

Action 4.2

Encouraging better links with business and industry

Encouraging robust links between our international education sector and Australian business and industry supports enhanced graduate employability outcomes, research investment and output, and technology and innovation transfer.

Australia has a global reputation for sound business acumen and industry innovation. Australian businesses and industry make a valuable contribution to our education, training and research sectors, and partnerships between researchers and industry are delivering Australian innovation to the marketplace. Australian businesses also provide internships and work-based learning opportunities for students.

We will continue to engage with industry to ensure our education and training systems are giving their future workforce the skills they need, including by encouraging ongoing educational engagement with industry and business. We will also continue to facilitate investment in high-quality research and innovation, and for partnerships in commercialisation and technology transfer. This will be supported by the Australian Government's *National Innovation and Science Agenda*.

Australia will:

- » maximise the involvement of business and industry in education and training
- » facilitate further industry-research connections.

Goal 5: Strengthening partnerships abroad

Australia will broaden our international engagement to support our role as a quality provider of international education.

Action 5.1

Building confidence through government-to-government engagement

Government-to-government engagement provides vital support for Australia's international education sector by laying the foundations for bilateral and multilateral collaboration. This opens new opportunities for countries and their students and providers.

Australia's international government-to-government and multilateral engagement encompasses cooperation in a range of areas including quality assurance, institutional accreditation and regulation, market access and promotion, qualifications recognition and research collaboration. Australia can also play a vital role in assisting with capacity building in emerging economies through financial assistance, designing or implementing training frameworks, and teacher exchanges. The Indo-Pacific region is a particular focus in government-to-government engagement. We have recently entered into free trade agreements with China, Korea and Japan, and are a signatory to the Trans-Pacific Partnership. These agreements will enhance our economic and social ties with these countries.



Mr Satoru Yamamoto from the Japanese Ministry of Education, Culture, Sports, Science and Technology (MEXT) taking part in the MEXT-Australian Government Department of Education and Training's officer exchange program. Government-to-government engagement is fundamental to strengthening international education.

The Australian Government will continue to provide access to, and recognition of, our international education sector through formal government-to-government representation and agreements, including through free trade agreements, memoranda of understanding, multilateral fora and working groups.

Australia will:

- » build and maintain strong government-to-government relationships to promote Australia's national interests in international education, training and research
- » support international capacity building.

Action 5.2

Strengthening collaboration through institution-to-institution partnerships

Institution-to-institution partnerships offer a wealth of opportunities for providers, students and researchers.

The partnerships support the provision of education and training through multiple institutions; credit transfer and qualifications recognition; student, professional and researcher exchange; joint degrees and research; and consultancies. Australian education providers and research institutes have a long and successful history of international partnerships with tangible returns.

Australia is keen to help education providers explore ways to further develop such partnerships, including country-to-country partnerships or domestic partnerships that may provide access to new international markets.

Australia will:

- » support education providers and research institutes in their international education, training and research efforts
- » expand institution-to-institution partnerships.

Goal 6: Enhancing mobility

Australia will maximise student, academic and researcher mobility.

Action 6.1

Supporting international mobility through practical visa settings and work arrangements

Australia welcomes international students, academics and researchers from around the world. This contributes to lifting our capacity for world-class education, training and research.

Australia offers a range of visa options to facilitate the entry of students, academics and researchers. These visa policy settings also enable international students on a student visa to undertake part-time work while studying, which helps to maximise graduate outcomes. This is a significant benefit for the student and a competitive advantage for Australia.

We will continually evaluate our visa settings to ensure we offer a fair and accessible system to encourage the most talented students, academic staff and researchers to come to Australia.

Australia will:

- » maintain competitive visa settings that facilitate the mobility of international students, academics and researchers
- » provide accurate and reliable information to international students on their visa conditions and work opportunities.

Action 6.2

Expanding student, education and training professional and researcher mobility

Arrangements that expand mobility opportunities allow students, professionals and researchers to take advantage of education, training, research and employment in other countries. This can enhance learning and experience, as well as future career and collaboration opportunities.

We have a particular focus on engaging with our Indo-Pacific neighbours to develop transformational relationships in our region and a more regionally engaged Australian workforce. Australia's investment in scholarships—such as the Australia Awards, Endeavour Scholarships and Fellowships, Endeavour Mobility Grants and the New Colombo Plan—to enable study, research and professional development in Australia, and for Australians to do the same overseas, is one of the largest in the world.

Our efforts are complemented by scholarships and mobility offerings from other countries. Scholarships provided by partner governments to their citizens indicate that Australia is regarded as a highly attractive destination.

Australia will:

- » support student, education and training professional and researcher mobility through scholarships and other offerings
- » build partnerships with other countries to support mobility.



Ms Firdha Rosemalinda Paulina, a participant in the Northern Territory Cattlemen's Association Indonesia-Australia Pastoral Industry Student Program. International student exchange creates mutual understanding, respect and lifelong connections.

New Colombo Plan

Under the New Colombo Plan, 10,000 Australian undergraduates are being supported to study and intern in the Indo-Pacific from 2014–2016. The program is enhancing understanding between Australia and other countries in our region, providing Australian students with new opportunities to study and intern in world class universities and companies, and providing valuable experience that enhances students' employability upon graduation. The program will expand further in the period 2016–2018.

Action 6.3

Supporting graduates through qualifications recognition

Positive qualifications recognition practices underpin the partnerships, linkages and collaborations that support successful mobility and a globally mobile workforce.

Australia promotes positive qualifications recognition practices to support students and workers. Australian qualifications are highly regarded and widely accepted around the world. The Australian Qualifications Framework (AQF) ensures consistency in qualification types and learning outcomes, quality of qualifications approved against high-quality national standards, and portability of easily understood qualifications. The AQF, as an integrated national

policy, guarantees national standards in education and training to support transparency in the recognition of Australian qualifications overseas. The AQF covers qualifications from schools, higher education, and vocational education and training to support national and international mobility.

Through sustained international cooperation, we can shape positive qualifications and skills recognition practices relevant to a globally mobile workforce. The ultimate goal is to achieve borderless mobility through acceptance of the quality and relevance of Australian education, training and professions. As a global partner, Australia also has a responsibility to support the positive recognition of overseas qualifications, while upholding the integrity of professional standards.

Australia will:

- » provide leadership on qualifications recognition domestically and internationally to support improved recognition practices
- » promote Australia's quality assured qualifications internationally to build trust, acceptance and recognition overseas.

Goal 7: Building lasting connections with alumni

Australian institutions and business will work together with governments to maintain meaningful connections with alumni for mutual benefit.

Action 7.1

Engaging alumni

There is significant opportunity for Australia to leverage links with the millions of international students who have studied on our shores. Such links would serve to facilitate students' continued academic and professional success, and support greater international connections and partnerships for Australia.

Australia has had a long history of international engagement, and many alumni and their families now hold influential positions in government and business throughout the world. They play key roles in strengthening Australia's reputation and relationships, and in promoting Australian international education.

To further engage our alumni, the *Australia Global Alumni Engagement Strategy* has been developed. This will help to strengthen the ongoing bond between alumni and Australia, enable ongoing networking and engagement for alumni, and help to build sustainable cultural and economic relationships between countries.

Australia will invest in building positive and enduring connections throughout the world with alumni. Sustained and enduring alumni engagement opportunities should be an inherent component of every student's Australian study experience, and core business for Australian education providers.

Australia will:

- » celebrate and support alumni success
- » develop innovative global alumni engagement strategies and build alumni networks.

Saving the world from space junk

The Cooperative Research Centre (CRC) for Space Environment Management is a consortium of universities, aerospace industry companies and space agencies, including the Australian National University, RMIT University, EOS Space Systems, Lockheed Martin, the NASA Ames Research Centre, Japan's National Institute of Information and Communications Technology, and Optus.

The CRC is helping scientists find and track Earth-orbiting debris that might collide with satellites or with Earth. The CRC is also developing ways to deal with this debris—the ultimate aim is to hit the space junk with lasers to slow its orbit and allow it to fall back into the atmosphere and burn up harmlessly.

Researchers estimate that more than 300,000 pieces of space junk, from tiny screws and bolts to larger parts of old rockets, are in orbit around Earth.

A partnership for growth in edu-tourism

International students have become the face of the Tasmanian tourism industry under an innovative partnership between the University of Tasmania (UTAS) and the Tourism Industry Council Tasmania.

The International Student Job Match Initiative places students studying at UTAS with tourism operators across Tasmania, helping them to gain valuable work experience while addressing skill shortages experienced by tourism operators during the peak summer tourist season.

International students have a heightened level of cultural awareness, are often multilingual and are looking to build on their study experience. Through this initiative, the students gain workplace skills and have the opportunity to further develop their English language through direct engagement with Australian and international visitors.

International education and tourism are Australia's biggest services sectors, and important social and economic contributors to our local communities. The Job Match Initiative builds on the strengths of both sectors for the mutual benefits of students, employers and the wider community.



3

Pillar 3

Competing globally

We are conscious of intensifying competition in international education from both traditional and emerging players. A consistent and coordinated national effort will be key to addressing this challenge.

We need to continue to promote Australia as a high-quality international education destination. It is vital that we demonstrate to other countries and to potential students the value of an Australian education. Students and their parents or sponsors want to be assured that they are investing in education that will deliver career benefits and demonstrate a return on their investment. We have a good message to sell, with quality education products supported by competitive visa settings and post-study work options.

At the same time, it is vital that we continue to work to ensure our international education matches this message. We will need to maintain the value and trust placed in an Australian education. We will also need to identify new opportunities, and to develop and evolve our products and services to meet the needs of tomorrow's students, business and industry. Australia's international education community stands ready and able to embrace new opportunities, to diversify and innovate, and to exemplify the highest standards of quality and student experience.

Goal 8: Promoting our excellence

Australia will promote itself as a world-class international education provider.

Action 8.1

Promoting Australia as a high-quality international education provider

Promoting Australia as a high-quality international education provider builds trust, and supports the growth and development of our education sector.

Australia has a well-deserved reputation as one of the world's most attractive places to study and live. Australia consistently performs well in surveys on education and research quality, liveability, student satisfaction and employment outcomes. Our education providers have become experts in international student service delivery over many

years. Our education, training and research excellence has built our popularity as an international collaborator. Countries around the world look to our world-class systems and learning products.

Australian international education will continue to build on its strengths and move forward as a united sector. We will promote Australia as a high-quality international partner and destination in established and emerging markets. In particular, the Austrade market development roadmap, *Australian International Education 2025*, will ensure Australia is competitively marketed in the global international education arena. Without restricting individual brands, we will work together to promote our shared excellence to be regarded as the best. During the next 10 years, Australia will aim to significantly expand its market access, especially in new and emerging regions.

Australia will:

- » promote itself as a high-quality international education destination.



International students enjoying a high quality living and learning experience in Australia.

Goal 9: Embracing opportunities to grow international education

Australia will embrace opportunities to grow international education by being more innovative, inclusive and responsive to the needs of students and employers.

Action 9.1

Building on innovative education and training services to meet student and employer needs

New educational products and services offer new opportunities for students. In particular, improved technologies enable us to be a borderless society, where learning can occur anywhere at any time. This is fuelling new ways of education delivery, including onshore, in-market and online. At the same time, today's students are more connected, more mobile and more affluent. They want greater choice in what, where, when and how they learn, and in the services available to them.

Australian education providers have embraced technology and innovation in learning, teaching and student services, and have proven their ability to quickly adapt and respond to new technology, student choice and emerging global demands. Learning management systems, adaptive learning technology and online continuous professional development are all delivering new ways of global learning. We are also learning from our students—new research into how students learn is helping to optimise educational technology and course design.

Australia will:

- » embrace technology to support the development of cutting-edge education and training services
- » embrace innovative education, training and research practices developed both nationally and internationally.

Action 9.2

Promoting opportunities in regional Australia

Although international students have traditionally gravitated towards major cities, there are often significant advantages in choosing a regional Australian education experience.

International student satisfaction with the living and learning experience in regional Australia consistently rates highly. These ratings are based on lower living costs, greater access to accommodation and work opportunities, closer interaction with the local community, and access to Australia's natural environment. Many of Australia's top areas of research strengths are located in regional Australia. These include agriculture, marine science and tropical medicine.

In turn, regional communities that have embraced international students have benefited through improved cultural understanding and international connections, helping them reach out to the world.



We will promote the positive benefits to the student and the wider community of education in regional Australia. We will also promote excellence in regional disciplines to attract international students and researchers.

Australia will:

- » attract more international students to regional communities by promoting internationally the excellence and the advantages of education, training and research in regional Australia.

Action 9.3

Identifying and responding to new opportunities

New opportunities in education, training and research will support the growth of the sector, and the delivery of products and services for our future students, business and industry. Opportunities may arise in terms of new markets, new partnerships, new areas of teaching and research, new technology, and new modes of delivery.

Australia's world-class international education sector has been built through its agility in identifying and responding to new opportunities throughout the world, while remaining dedicated to quality.

We must continue to exercise this agility in finding new and innovative connections that will meet student, business and industry needs, and further develop the sector. Accurate and timely market research and intelligence will be critical. We will need to ensure that we are appropriately targeting our resources to identify and respond quickly to new and emerging opportunities.

Australia will:

- » conduct market research and intelligence sharing to inform new policies and strategic directions for international education
- » be agile and responsive to opportunities to increase the number of international students and international partnerships, capitalising on identified growth areas such as schools.

Student-centred technology is changing the way we teach and learn

An Australian innovation is changing the global approach to teaching and learning. Moodle—an online, open platform learning management system (LMS)—is paving the way for customised education interactions. The company’s mission is to support teachers to teach and students to learn.

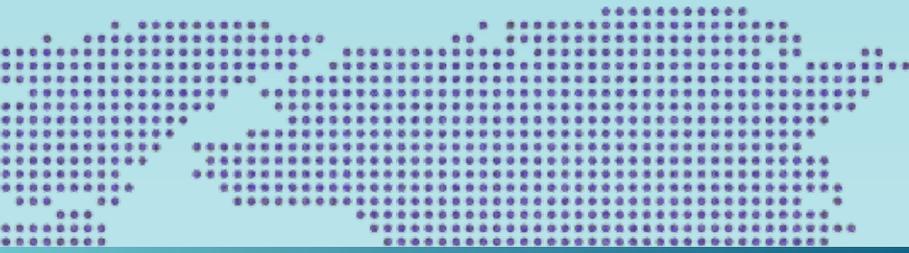
From its beginnings in Perth in 2001, Moodle has expanded to a global community of more than 70 partners, 200 active developers and 65 million users. The company counts some multinational corporations and world-leading education institutions, such as Monash University, among its millions of users. When Monash University was looking to upgrade its LMS, the flexibility offered by Moodle gave Monash academics new opportunities to design content and activities with the student experience at the fore.

Living laboratories for climate change

The Low Carbon Living Cooperative Research Centre (CRC) is blending social sciences and technology research by creating buildings and precincts of sustainability and low carbon living.

Building on its multidisciplinary research base, the CRC is examining how communities live and interact with new energy and sustainability technologies. Three ‘living laboratories’ are testing integrated energy, water, waste and transport solutions. The researchers are measuring the social factors associated with sustainability, such as the value proposition for residents and the choices they make. This research aims to provide the tools for reducing the carbon footprint of urban systems.

The CRC is a partnership between industry, government organisations, overseas universities, Curtin University, the University of New South Wales, the University of South Australia, the University of Melbourne, Swinburne University of Technology, the United Nations Environment Programme and CSIRO.



Australian International Education 2025

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2025



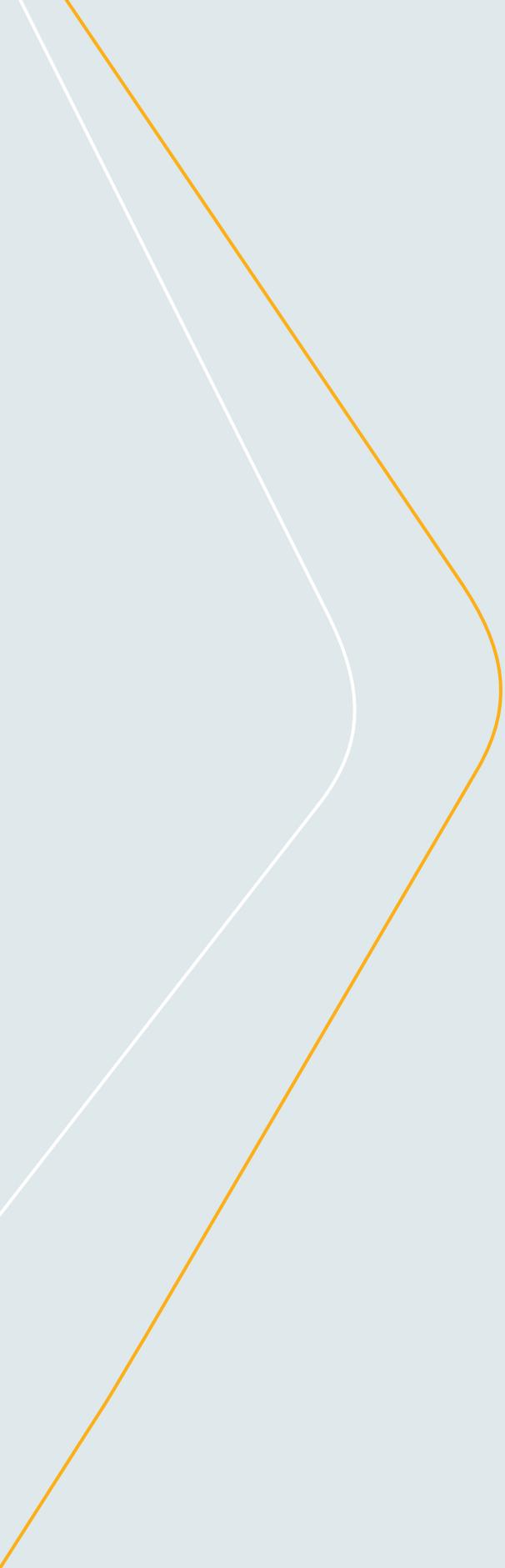
Australian Government

Australian Trade and Investment Commission



Australia

FutureUnlimited



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National strategy

Australian international education helps students, communities and industry around the world

Australian international education is a world-leading brand. Australia's National Strategy for International Education aims to build on the current success of the system and capitalise on new opportunities so that Australian international education helps individuals, communities and industry around the world to reach their potential.

This roadmap has been co-created by Australia's international education sector together with Austrade and other arms of government to complement the National Strategy by identifying what we collectively need to do to excel globally on a scale like never before.

For more information visit
www.internationaleducation.gov.au

Aspiration

Delivering education and skills to meet the needs of the world's one billion students in 2025

Analysis from Deloitte Access Economics estimates that the world of 2025 will have over one billion students actively seeking education and skills.

Based on these projections, the onshore sector may be capable of increasing from nearly 500,000 students today to 720,000 by 2025 – a compounding annual growth of 3.8%. In a high market-share scenario, these numbers could almost double to nearly 990,000 by 2025. Beyond this, in the relatively untapped borderless skills market of in-market, online and blended delivery – there are projected to be in excess of one billion students around the world.

Reaching just 10% of the potential market would translate to over *110 million students in 2025*. This scale of ambition reflects the role of international education as one of the next major opportunities to help drive our growth and prosperity.

Onshore students in Australia will always remain core. This experience creates the deep social, cultural and economic linkages for which international education is so valued. However, technology and international trade and investment linkages increasingly mean providers need to sharpen their focus on understanding the drivers of demand, and to conceptualise and deliver learning that best meets these needs.

The traditional concept of the *student* will not reflect the world of 2025. Learning increasingly takes place in a variety of environments, with emphasis on different relationships and interactions to develop skills and knowledge. A much wider range of players that includes technology, teachers, peers, employers, and course and curriculum development experts enable this experience. The *2025 student* will increasingly include our traditional view of a student but also individuals seeking learning through on-the-job skills development, executive education and development, and recreational learners who are seeking to build their own skills while on holiday or as part of their leisure time.

Learning will be increasingly borderless. The traditional demarcation of the sector into onshore and offshore or transnational reflects a division that will be challenged as *2025 students* access the skills and knowledge they require at the time they chose, through the channel that optimises their learning experience, be it in Australia, online, or in-market as part of course delivery or on-the-job learning.

To reach over 100 million students – we will need new ways of doing things. Embracing a much wider view of students – the *2025 student* is a key concept in our aspiration. We will need to work differently and try new approaches. We will require significant capital investment into the sector and

into related supporting industries to enable sustainable growth. We will need to model more of the behaviours of collaboration, innovation, and student-focus, and push ourselves to continually improve.

In this roadmap, our international education sector includes:

- ▶ Our established higher education, vocational education and training (VET), English language providers and schools that are delivering accredited programs onshore and offshore.
- ▶ Providers and businesses that are delivering non-accredited learning both in Australia, in-market and online.
- ▶ Education technology (edutech) providers that are delivering Australian education content in their own right or that are partnering with education and training providers to enable the delivery of Australian learning globally.
- ▶ Education services such as course and curriculum development, education publication, as well as learning offerings from corporate providers accredited by themselves.
- ▶ The Tourism and Services sector also have an important stake in realising our aspiration, particularly the providers of auxiliary services such as student accommodation, banking and finance and health insurance.
- ▶ Governments at all levels enable the sector by responding to constraints or amplifying opportunities for ongoing sustainable growth.

In excess of one billion students in 2025

The case for change

Australia's onshore international education sector is the strongest it has ever been and its borderless offerings continue to grow

International Education is identified as one of five sectors that can drive the next wave of Australia's economic growth and prosperity.¹

International education is currently one of Australia's top service exports, valued at \$19.65 billion in 2015 (including fees and associated expenditure) and supports over 130,000 jobs in cities and regions throughout Australia.

Despite these successes, we only skim the surface of the potential of the global opportunity.

Major demographic shifts coupled with significant restructuring in the global economy mean that the scale of the international education market is likely to increase dramatically. At the same time technology and market liberalisation open up opportunities to pursue the broader conceptual opportunity of the borderless 2025 student.

Deloitte forecasts an enormous prospective opportunity with a billion students in 2025. Our sector's high quality and expertise in critical industries together with Australia's geopolitical position and multicultural society, mean that we are well-positioned to capitalise on these opportunities.

We must also be realistic. There are constraints to how far and fast the sector can sustainably grow. Australia's current competitive strengths will not automatically translate into the realisation of opportunities in the borderless sphere.² Existing and new competitors are as equally focused on realising the opportunity. We need to be vigilant to ensure that the learning experiences of those that choose Australia – continues to justify the confidence and trust they place in us.

This roadmap challenges the sector to realise its full potential. To make this happen, we need significant investment and commitment.

MARKET GROWTH

Population growth and increasing global wealth are driving demand for education services. The world's population will increase from 7.2 billion in 2015 to 8.1 billion in 2025, with most growth in developing countries and more than half in Africa.³ Within this, the main consumers of formal international education – the global 15-29 year old population – are projected to increase from 1.77 billion in 2015 to 1.85 billion.⁴

The middle class is anticipated to "comprise two-thirds of world population by 2025, with emerging economies to increase their share of the global medium-high middle class and affluent segments from 24% in 2000 to 67% by 2025 (or 2 billion people)".⁵ China and India alone are expected to grow at rates of 6% and 7% respectively in the next ten years and the five-year outlook by the International Monetary Fund (2015) has year-on-year economic growth projected to be almost 7% for the "developing Asia" region.

In contrast to population growth in emerging and developing countries, Australia and its major trading partners are seeing a transition to an ageing society. Higher life expectancy and falling birth rates have contributed to the ageing of the world's population at an unprecedented rate.⁶ These changes drive new challenges in fuelling productivity and overall competitiveness – requiring new skills and learning needs. These changes also impact our existing markets.

1. Deloitte Access Economics (2014). *Building the Lucky Country #3, Positioning for prosperity? Catching the next wave*, Deloitte Access Economics Pty Ltd, Canberra.

2. Deloitte Access Economics (2015). *Growth and Opportunity in Australian International Education*, Austrade, December 2015.

3. United Nations, Department of Economic and Social Affairs, Population Division (2015). *World Population Prospects: The 2015 Revision*.

4. Deloitte Access Economics (2015). *Growth and Opportunity in Australian International Education*, Austrade, December 2015, p.13.

5. Banco Bilbao Vizcaya Argentaria, Eagles Economic Watch (2015). 'Flourishing middle classes in the emerging world to keep driving reduction in global inequality', 2 March 2015.

6. British Council (2013). *Megatrends the future of International Education*.

Deloitte expects that China will see a decrease in the size of its 15-29 year old population by 40 million by 2025, while Australia's second largest inbound source market, India, is set to increase by 16 million; and emerging markets such as Nigeria, Pakistan and Philippines will see a collective growth of 29 million by 2025.⁷

Australia needs to be prepared for the scale of the opportunity and to pursue those areas most closely aligned with our competitive strengths. These changes will also require us to consider the markets we target and anticipate shifting demand to ensure sustainable growth long-term.

DEMAND FOR SKILLS

By 2020, a global shortage of up to 85 million medium-skill and high-skill workers is forecast.⁸ Up to five million jobs could be displaced due to economic transformation and the associated changing demand for skillsets.⁹ This phenomenon of rapid economic restructuring and change characterises the global economy. As developing economies and cities grow, "they are expected to see a shift from primary industry and manufacturing-based economy to an increasingly service-oriented one" with consequent skills and knowledge gaps.¹⁰ At the same time, CEDA (2015) estimates that "within two decades, more than 40% of Australian jobs that exist today may disappear as technology reshapes entire industries."¹¹

This rapid change is creating an ever-growing market for learning providers that can anticipate the needs of employers and 2025 students and offer products that not only enable skills gaps to be addressed through a range of offerings, but that also equip individuals with the skills to adapt, foster and harness this pace of change.

TECHNOLOGY

Technology's evolving competitive landscape is one of the most penetrating megatrends that is changing the way education services are "delivered, supported, accessed, assessed, perceived and afforded."¹²

One of the most influential developments in education over recent years was the deployment of Massive Open Online Courses (MOOCs). Learning management systems, adaptive learning technology, education applications, online continuous professional development are all examples that have followed, charting new paths for learning globally. 2025 students will be far more mobile, diverse and flexible in their careers than ever before as digital disruption continues to redesign industries.¹³ Australian institutions are already responding to these skills gaps by partnering with business to build specific learning pathways through online competency-based education, in what will only increase in demand.¹⁴

Critical to Australia's ongoing success will be our ability to anticipate and respond to the next wave of disruptive technology by finding the opportunity within and applying it to our learning offerings.

COMPETITORS

With growth comes competition. Our existing competitors will not be complacent. We also face emerging competitors. A growing global middle class presents some opportunity to attract students to Australia but it is also associated with a growing demand for quality in-country education. Education provision has been growing in quality and capacity in China and Hong Kong,¹⁵ and Malaysia has established regional education hubs to attract international students outside their traditional student base.¹⁶ This means Australian education and training providers will face new and stronger competition, as traditional source countries such as China become major competitors.¹⁷ This change makes it increasingly important for the sector to consider their longer-term growth strategies and consider a broader view on in-market, online and onshore delivery as a cohesive borderless offering.

85 million medium- and high-skill workers in short supply

7. Deloitte Access Economics (2015). *Growth and Opportunity in Australian International Education*, Austrade, December 2015, p.14.

8. McKinsey Centre for Government (2012). *Education to Employment: Designing a system that works*.

9. <http://www.weforum.org/press/2016/01/five-million-jobs-by-2020-the-real-challenge-of-the-fourth-industrial-revolution>

10. Deloitte Access Economics (2015). *Growth and Opportunity in Australian International Education*, Austrade, December 2015, p.14.

11. Durrant-Whyte, H, McCalman, I, O'Callaghan, S, Reid, A, & Steinberg, D 'The impact of computerisation and automation on future employment', in Committee for Economic Development of Australia 2015, *Australia's future workforce?*, CEDA, Melbourne, p.58.

12. Den Hollander, J 'A brave new world of education' in Committee for Economic Development of Australia 2015, *Australia's future workforce?*, CEDA, Melbourne, p.232.

13. Universities Australia (2016). *Keep It Clever Policy Statement 2016*, p.1.

14. For example, the SEEK and Swinburne University of Technology partnership to deliver online degrees; Western Sydney University and Telstra MoU exploring utilisation of latest technologies for teaching, learning and research; and Rio Tinto's international education portal SMART (Study, Mining and Rio Tinto).

15. *British Council (2013). Megatrends the future of International Education*, p.9.

16. Australian Government (2013). *Australia – Educating Globally, Advice from the International Education Advisory Council February 2013*, Commonwealth of Australia, Canberra, p.61.

17. Den Hollander, J 'A brave new world of education' in Committee for Economic Development of Australia 2015, *Australia's future workforce?*, CEDA, Melbourne, p.226. "China is now the third most popular international study destination (behind the US and UK), with Australia slipping to 6th place behind France and Germany.

Culture of success

The education sector of 2025 will be enabled and characterised by its spirit of collaboration, innovation, anticipation and reciprocation

Throughout 2015 more than 800 representatives of the sector expressed their views at a combination of Ministerial roundtables, town hall meetings, and workshops.

Areas of consensus emerged on how Australia's international education sector can become a truly transformational force.

Ultimately, the greatest challenge in the activation of the 2025 roadmap will be fostering a culture that thrives on the opportunity presented by change and disruption, in which, these behaviours are key.

"Fundamental to achieving or even sustaining the type of growth we've achieved over the last 10 years, will be changing the way we do things, changing our operating models, engaging with each other differently, thinking about it completely differently and not taking anything for granted."

Patrick Brothers, Chief Development Officer, Navitas

COLLABORATION

The culture of 'compete at all cost' has to be re-imagined in the context of a collective ambition to collaborate to grow the sector and achieve much more, not just as individual providers.

Our success to date has reflected good collaboration. During our consultations the sector identified that 'good' is not good enough and a whole new level of collaboration must be achieved if we are to realise our aspiration.

Collaboration must extend across the entire sector and not just within the segments of the sector that already know and work with each other. A greater degree of connectivity and scale are needed that will see Australian providers working together to meld their individual strengths into unique offerings that will enable us to compete to excel.

Collaboration in the form of creating consortia and public-private partnerships must become a core competency of the sector.

INNOVATION

The sector must disrupt or be disrupted. Disruption is inevitable. The sector needs to embrace this disruption and seek the opportunity that it invariably presents. Change needs to be viewed as an opportunity and our openness to innovation in the provision and delivery of learning, will underpin our international reputation and comparative advantage.

Complacency has no place in achieving our aspiration. There are instances of excellence among the sector in continually innovating - where providers consistently seek opportunities to improve their offering and use new approaches and technology to deliver better outcomes for students. These instances need to extend to become a sector-wide culture that we are recognised for as much as our existing quality and strengths.

"The sector should have appropriate measures in place to mitigate risk, but those measures must support and not stifle innovation if we are going to be successful in accessing the global opportunity."

Brett Blacker, Chief Executive Officer,
English Australia

ANTICIPATION

Demand must drive our focus rather than the constraints of existing supply or the 'way we've always done things'. To maintain our edge and forge new advantages we must place the *2025 student* at the heart of how we design and deliver learning so that their experience reinforces our brand as a provider of choice for international education. We cannot view them in isolation from others who can be key influencers in the decision-making process, such as employers and family-members.

This is as much about learning and anticipating the skills that students and employers will be seeking, as it is about the style and delivery channel of the learning experience. One of our greatest comparative advantages should come from our ability to deliver what is demanded by the market, while maintaining our reputation for quality.

This anticipation must be connected with innovation and trying new approaches. The sector needs to diversify in terms of business models, target markets, and service offerings so that it is able to withstand changing circumstances or shocks in the international environment.

RECIPROCATION

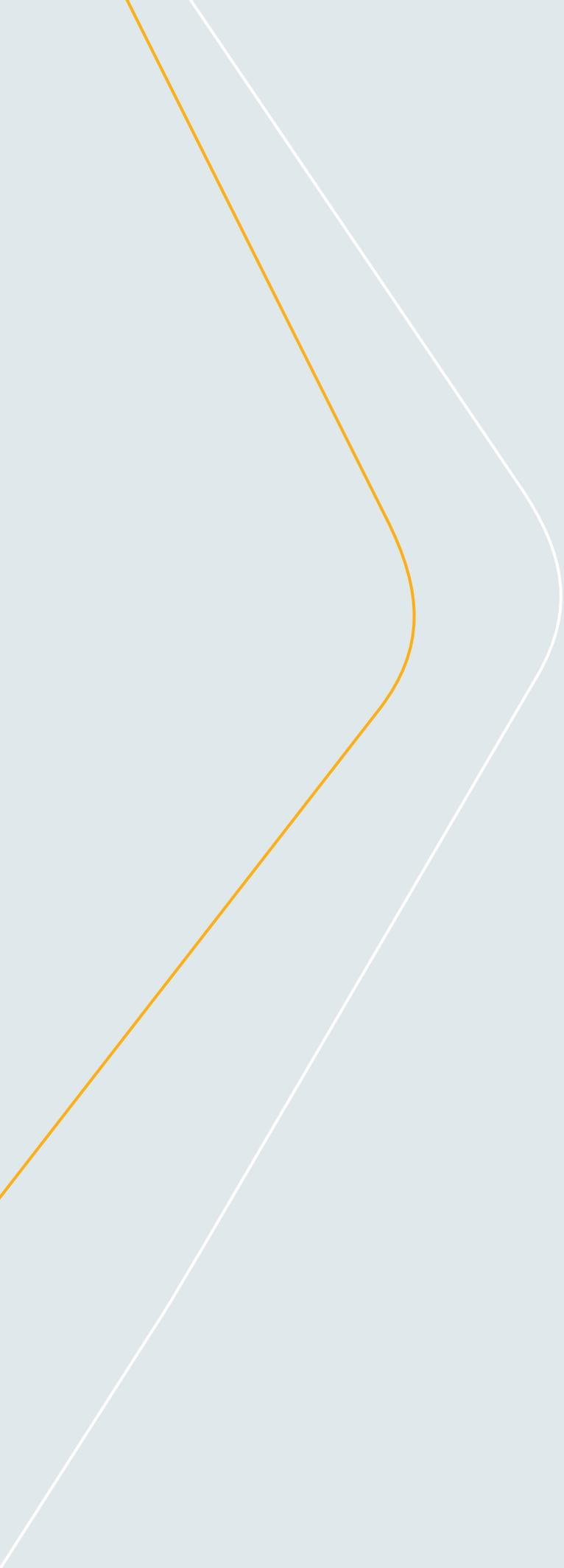
To develop sustained, long-term growth in existing and emerging markets, in a way that builds rather than detracts from the existing strengths of our brand, our starting point cannot be what we 'get' but what we can 'give'.

Our interactions must be reciprocal and have a longer-term dimension and value.

This reciprocal approach will enable a deeper understanding of the *2025 student's* needs and build an understanding of how Australia's strengths in education can best enable individuals, communities and industry.

"Can we innovate course delivery to contain costs? We've talked about paradigm change but what about a mindset change? Can we deliver courses that are shorter, more flexible and more cost effective to both students and to providers?"

Aleksandr Voninski, Executive Director,
UNSW International, University of
New South Wales



Game- changers

Ideas that will shift the current way of doing things, leading to a different outcome

Game-changers are the ideas that could give Australia the edge in realising our aspirations.

These are the ideas where, together, we will try new initiatives and approaches to grow our markets. Where these succeed, we will build on them to continue their success. Where they do not, we will share and use our learnings to identify and trial new ideas that will stimulate and support the growth of the sector. The game-changers most likely to fundamentally impact Australia's position as a global force enabling individuals, communities and industry to realise their potential, are set out on the following pages.

COMPETE AT SCALE

How do we form the scale required to compete to excel?

The scale of the global market and the nature of the opportunities that exist are enormous, as is the challenge posed by current and emerging competitors. Providers will need to have a much greater capacity for delivery to meet the scale of opportunity, or an understanding of their unique value and how they can work with others to form a compelling offering that will achieve the scale required to meet target markets or new opportunities.

Under this game-changer, we will trial initiatives targeted at building new networks and linkages across the sector, building capability to form successful consortia and partnerships, and improving the sectors approach to understanding and articulating capability strengths.

EMBRACE BORDERLESS LEARNING 24/7

How do we use new channels and approaches so that '2025 students' can access the best of Australia's education offerings – when and where it will optimise their learning outcome?

Students are increasingly familiar with a world where technology enables them to define their own preferences for what information they see and how other people in the world interact with them. Technology also allows providers to deliver learning and education without being physically proximate to the student. The *2025 student* view of their experience will be a relatively borderless one – centred on their needs and how these can be best met. Providers need to offer education and skills experience that reflect the demands and preferences of the market – rather than being shaped by the constraints of supply – offering blends of online, in-market and onshore.

Providers that are reluctant to come to terms with the opportunity to target *2025 students* through a variety of channels to best enable their learning and deliver optimal outcomes will face significantly increased competition. The success of the sector to embrace the opportunity presented will be a genuine game-changer that will position us well to engage 100 million *2025 students* and transform the approach to learning, as well as the individual, their communities and industry.

Under this game-changer the sector will need to lead by defining their individual aspirations in the borderless space and integrating that into their business model and offering. The government will consider how to gain more meaningful data on the borderless space and options for how we can lend quality assurance approaches to this delivery model so that we maintain Australia's reputation for high-quality learning.

UNLEASH TECHNOLOGY

How can the sector harness technology and data to improve their offerings?

Using the power of technology needs to be at the core of how the sector works, enabling not just delivery through online channels in the borderless space but in improving provider operations and understanding of student experience. At its most basic level, this is about technical proficiency and efficiency in enabling operations, but at the other end of the spectrum it is harnessing the data generated from online delivery – tracking keystroke patterns by students to understand how they learn, identifying individuals at risk of non-completion, and ultimately using the data available to improve offerings.

Providers need to understand best-practice use of technology in learning delivery, and consider this against their own aspirations and capacity to develop their competency and systems – to place technology at the heart of how they improve their service offering – and embrace rather than resist technological change. Government must also improve its understanding among the sector of best-practice initiatives in technology application to learning, and to our own promotional and marketing activities of the sector – to showcase and build a reputation of technological innovation.



SHARPEN MARKET FOCUS

Where is our greatest comparative advantage and how do we maximise its impact in our approach to market?

We understand that there is a remarkable opportunity that exists. We know too that a lot of our success is built on traditional markets and drivers that have not required the sector to refine their own understanding of their unique global strengths, and how to position themselves in the market to greatest advantage.

We want to realise our ambition in the smartest way possible, which means identifying where we should compete and focussing our resources in the right places for the biggest returns, ensuring that the way we market and promote Australia's offering is right for the market. It should also reflect a strategic view of sustained long-term growth – which requires the sector to pursue opportunities to diversify their markets and to consider how to maximise their gains in emerging markets.

The government will highlight to the sector the areas of greatest prospective opportunity and trial initiatives in new and emergent markets to test how well we can develop these opportunities. The sector must take a longer-term view themselves of where they are best placed to compete, and how the brand of Australian international education can best support the achievement of our aspiration.

ATTRACT GLOBAL CAPITAL

How do we ensure that growth aspirations are supported by sufficient investment to sustain growth and improvement?

Significant sustainable growth requires investment. Not just traditional attraction to build infrastructure capacity but a smarter approach to attracting the capital necessary to develop and translate new ideas into profitable ventures and to expand existing supply in the borderless space to meet demand. In developing an understanding of their unique value, target market, and offering, the sector must consider their own longer-term investment strategies and skills, to present a value proposition that can attract investment.

The government will target some selected conferences popular with key education investors to showcase Australian capability and undertake, in response to interest, facilitation services to connect prospective investors with providers in Australia.

MAINTAIN AN AUSTRALIAN EDGE

What unique element of the Australian education approach can we capitalise on to build our reputation and attractiveness as a provider of learning?

Australia has led the way in key innovations in international education policy, market development and solutions – such as the use of high quality agents and our approach to legislating to protect the rights of international students. The National Strategy will continue strengthening our fundamentals as we seek out the next key drivers of improvement and growth – some of which will likely flow from the game-changer themes set out in the roadmap. We will leverage these strengths and drivers in our marketing and the overseas promotion of our offering.

Under this game-changer, the sector and governments will work collaboratively to consider new approaches and changes that could enable a new series of growth in the sector, or that can significantly add to our competitive edge as a provider of choice. This includes idea generation, sectoral leads developing proposals with government facilitation, and working together to make these ideas a practical reality that are then applied to our international marketing efforts.

Roadmap activation

- ▶ This roadmap seeks to catalyse readiness for change and increase agility within the sector.
- ▶ We are aiming to drive fresh thinking and action in the identification and pursuit of opportunities for sustainable growth both onshore and in borderless education that match the sectors strengths with trends in global demand.
- ▶ The roadmap is not an exhaustive set of actions. It sets out an ambition and approach to testing new actions over the next ten years to realise the full potential of the sector. The periodic activation plans that will support this will evolve and change in response to both what we learn, and inevitable changes in the global economy.
- ▶ Success will rely on a spirit of shared ownership, and leadership by the sector. This will involve considering

new ideas, prototyping and investing in them, and learning from experience. It will involve providers leading and participating in the game-changers and embodying the culture and behaviours identified as key to success – particularly putting aside a ‘compete at all costs’ approach and making serious efforts to work collaboratively.

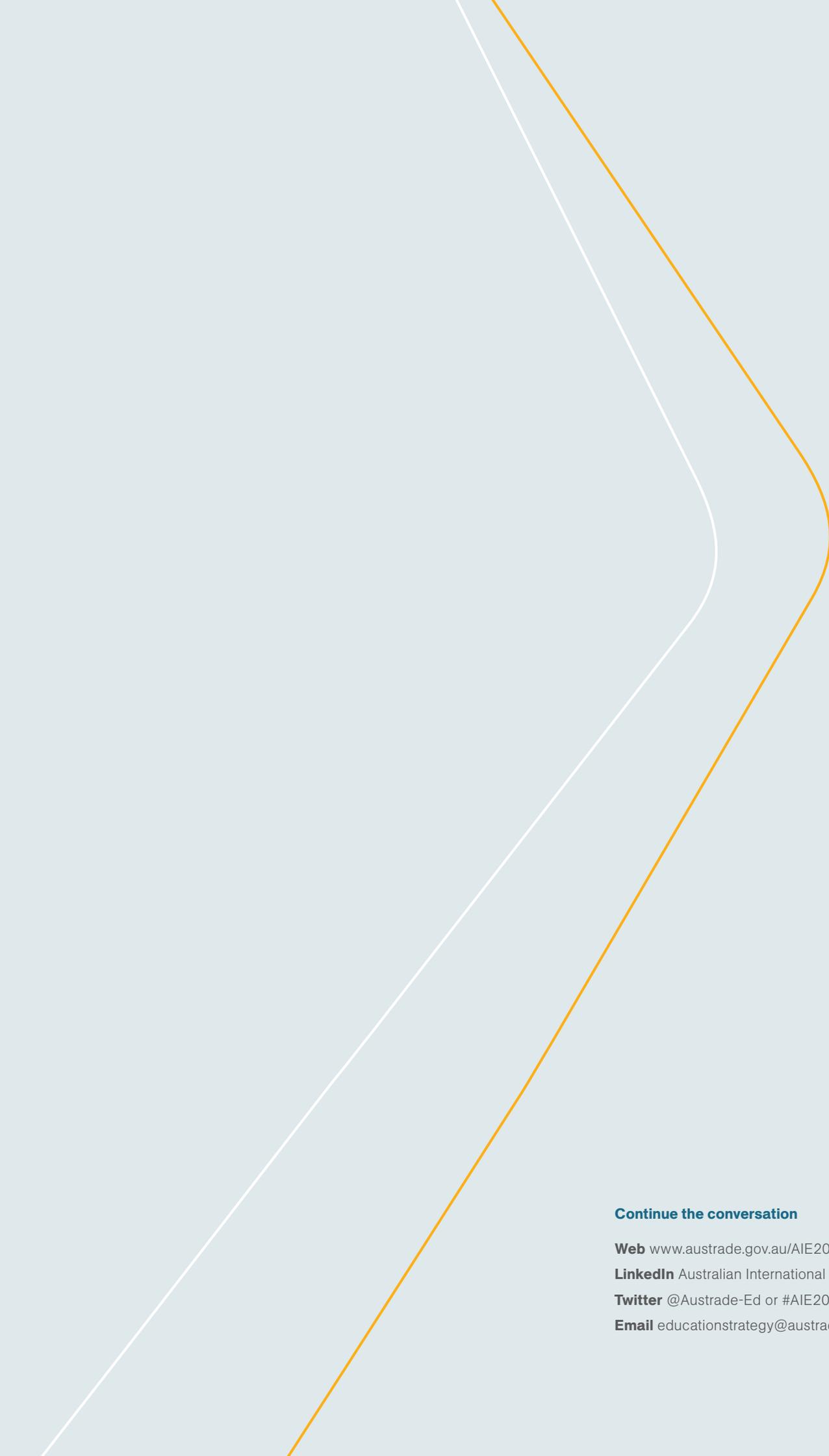
- ▶ Governments will enable this activation. Facilitating the process of idea generation and responding where the sector show that they are leading the way and a government response can remove an impediment, or amplify growth. Australian, state and territory, and local governments, all have a role to play in fostering the right environment to enable the sectors’ success and cross-government collaboration needs to be strong

so that our approaches are complementary and collectively enable the sector.

- ▶ Within this – Austrade will continue to work with the sector as the co-creator of this roadmap. Austrade will act as a custodian of the ideas that come forward and help broadcast learning back to the sector. Within this too, Austrade has its own specific activities that it will undertake within its role to enable the sector. These activities form the core of our first intermediate plan to underpin the roadmap. Together with the sector, Austrade will help assess the effectiveness of our approach and to reconsider our direction as we continue through to 2025.

For more information visit www.austrade.gov.au/AIE2025





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