



Australia China Business Council
澳大利亚中国工商业委员会

AUSTRALIA- CHINA EDUCATION SYMPOSIUM

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NATIONAL
FOUNDATION FOR
AUSTRALIA-CHINA
RELATIONS
澳中基金会

An Australian Government Initiative



Program

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Mr. Gareth Williams



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The Hon. Phil Honeywood



Guest Speaker

The Hon. Julie Bishop



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Ms. Vicki Thomson
Prof. John Shields



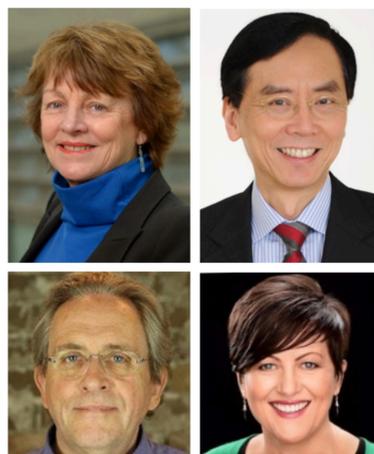
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The International Education Industry in 2021 and Beyond

*The Hon. Phil Honeywood, CEO, International Education Association of Australia;
Convenor, Council for International Education*

The 10 Year National Strategy for Education — with themes of ‘Connected, Creative, Caring’ — will have students at its centre. It will also have a strong emphasis on new modes of delivery of education.

Australia can continue to leverage the advantages of reputation, favourable time zone, attractive environment, high rankings and strong educational standards. Our capable handling of the pandemic has also provided Australia with a “COVID dividend”.



However, Australia will face a range of emerging competitors from China, Southeast Asia, and beyond – all whilst established destinations such as the US, UK and Canada will work hard to attract student enrolments. These competitors would also offer attractive visa advantages which are not offered by Australia.

Work will need to continue on ensuring international students feel at home in Australia, and for them to also derive personal and professional benefit from their studies. We should work to increase the range of programs to provide services to students, support professional readiness, and also to mitigate impacts from cultural barriers. Working together, Australia can significantly improve its value proposition across the education industry.

A View from NSW

Pre-Pandemic NSW hosted over 280,000 students, with some 80,000 from China.

International education had been responsible for over 5,000 jobs in NSW.

International education is a continued priority, with funding for StudyNSW having doubled to enhance the international student experience. The government is also supporting the sector’s recovery through a \$20 million package.

China will remain a strong partner for international education into the future.

*International students connect us to
the world.*

Maintaining Institution-to-Institution Links During the Pandemic

The Hon. Julie Bishop, Chancellor, Australia National University

Ms. Vicki Thomson, Chief Executive, Group of Eight

Professor John Shields, Academic Director (International), University of Sydney



The university sector is vital for Australia's future and wellbeing — it produces our future leaders, leads research that underpins our advanced economy and forges collaboration with partners around the world. International education is critical to the sector.

China is a key partner. As well as a major source of students, China is Australia's third-largest partner for research collaboration. It has the greatest expenditure on R&D in absolute terms of any economy in the world. China's own university sector is advancing rapidly, with six universities now in the world's top 100. China is the most popular destination for the New Colombo Plan, which allows Australian students to undertake part of their degrees in Asia.

Australia-China education links have assumed greater importance amid tensions in the bilateral relationship. Track 2 dialogue (between non-government entities such as universities) is helping preserve positive engagement between Australia and China at a time of limited Track 1 (political/official) and Track 1.5 (official and non-official) dialogue.

Australia has deep connectivity with Chinese researchers, which we would want to keep.

The pandemic has been highly disruptive for the education sector, creating an estimated 17,000 job losses. The sector nonetheless moved swiftly to support Chinese and other international students affected by border closures. As well as pivoting to online delivery, it sent study packs overseas, added new tutorials to suit overseas time zones, set up online student support programs

and arranged informal meet-ups in China. Anti-discrimination campaigns were held on campus to address isolated racist incidents following the outbreak of the pandemic.

The sector has maintained constructive engagement with the Chinese Ministry of Education, which has led to the acceptance of online learning during this period. Chinese students accepted online learning, although this has never been seen as attractive in China. Enrolments have bounced back in 2021 for universities, albeit not for other education segments.

Chinese students have so far maintained their loyalty to Australian institutions, reflecting our long history as an education provider. The challenge will be to attract new students. The current environment is undergoing considerable volatility. Added to this, China's education system itself is changing rapidly.

The sector also needs to pivot away from a model where teaching Chinese students is the sole mode of interaction.

Universities need to build connections with Chinese counterparts on a mutually beneficial basis.

Engagement through joint degree programs are among options for strengthening links in a more holistic way. Valuing and nurturing our long-standing relationships will be vital.

Maintaining the richness of student experience at our institutions will remain a key theme for our institutions moving forward. The pandemic has underlined that the students value their on-campus experience.

Panel: International Education — Evolving Consumer Perceptions in China

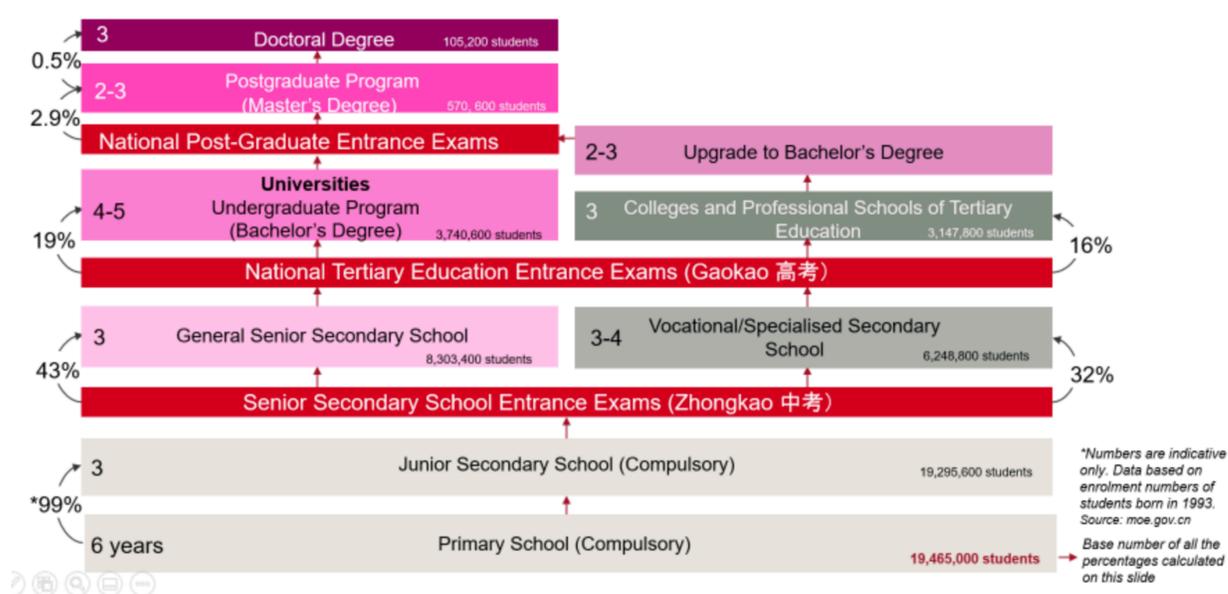
Ms. Nicole Brigg, Pro Vice Chancellor (International), Macquarie University

Ms. Brooke Hartigan, Minister-Counsellor (Education and Research), Australian Embassy Beijing

Mr. Iain Watt, Deputy Vice-Chancellor & Vice President, University of Technology Sydney

Mr. Mark Lucas, Chair, International Student Education Agents Australia

Dr. Amanda Barry, Director, China Liaison Office, International Strategy Portfolio, Australia National University



The growing supply gap is particularly stark in post-graduate study. Demand for post-graduate courses tripled to 3.4 million between 2020 and 2020, with over 2 million missing out on a place. At the same time, an expanding middle class means families have growing resources to invest in education. Education in China is closely linked to a sense of economic security and social prestige. It is seen as an insurance policy for their children's future, and can account for as much as one third of household budgets.

Demand for education in China continues to grow strongly. Students are sitting China's tertiary entrance exam, Gaokao, in record numbers. An additional one million undergraduate places were created in China between 2009 and 2019. Moreover, demand continues to outstrip supply, leading many students to consider international study. Only 5 per cent of the 10 million-plus Gaokao examinees receive a place in one of China's top 100 universities. Some 10 per cent do not receive a place.

Education has become an important family investment strategy for coping with fierce social competition.

The impact of COVID on demand for Australian education services has varied widely by sector. New admissions for Chinese students in the higher education sector were higher in March 2021 than in

the previous year. With the right policy settings and course offerings, post-pandemic demand for Australian higher education could be higher than pre-pandemic. By contrast, admissions dropped sharply in VET, ELICOS, schools and non-award courses. Some courses do not lend themselves to online study. Across the board, tensions in the bilateral relationship have not played well.

Online learning during COVID was accepted by Chinese students as a necessary expedient. However, online education is not seen as attractive as face-to-face learning. Nor are wholly online qualifications recognised by Chinese authorities. Students pay for an on-campus, 'authentic' education experience.



Nonetheless, it is likely that, post-COVID, a large number of students will complete at least part of their qualifications online. Offshore Learning Centres with partner universities are among the ways institutions can provide an on-campus experience while delivering education online.

A further challenge for Australian education providers is the price point at which online study options are offered. Chinese students do not value online learning as highly as that delivered face-to-face learning. However, online education is no less expensive to deliver.

We need to remain world class and adaptable, and to supplement this with other measures too.

Despite strong demand for education in China, Australian providers face new competitive pressures. A growing focus in China on 'international education at home' could affect future student numbers. Moreover, digitisation of education could also create competitive pressure. New education destinations – including those in continental Europe – are also emerging. Decision drivers will continue to be quality, student experience, and prestige. Perceptions of safety and security will also be key.

In a more competitive international environment, Australian institutions need to develop markets based on differentiated "products" with stronger value for students. They need to offer a learning experience that competes well, and empowers and prepares them for careers.

Panel: Changes in Educational Offerings in a Post-COVID World

Professor Shirley Alexander, Deputy Vice-Chancellor and Vice President (Education and Students), University for Technology Sydney

Professor On Kit Tam, RMIT University

Mr. Terry Hilsberg, Venture Partner, Innohub Capital

Ms. Maria Spies, Co-CEO, HolonIQ

COVID has brought into sharp relief the impact of technology on this sector. With a world of content now freely available, the days of the pure delivery of content are over for the education sector. More important is delivering key attributes such as critical thinking, problem solving, teamwork and communication skills. This changes the way education is delivered.



There is a need to reimagine education in light of the rapid advancement of technology.

Current Challenges for Australia:

- Poor technical latency of online solutions with China*
- Weak integration with Chinese mobile lifestyle and applications environment (eg with WeChat)*
- Weak relationship with work integrated learning and job opportunities in China*
- Weak China-specific user support, such as availability of Chinese language support materials*
- Lack of "bite sized chunks" such as single unit for credit offerings, which reduces risks for student and family*

Moreover, education institutions are facing competition from non-traditional players, such as those providing Mass Open Online Courses (MOOCs).

Major technology companies are educating their own workforce and increasingly offering education beyond this. For many students, recruitment by a prestigious global brand is more valuable than a traditional tertiary qualification. Chinese society – and its education sector – are changing in ways that will create added challenges, as well as opportunities, for Australian providers.

Education technology (Edtech) in China is advancing rapidly, creating a cohort of students demanding a high level of sophistication in education delivery. Total venture capital funding of Edtech in China was double that of the US (at US\$28 billion). The reach of some Chinese Edtech applications is significant – even over 30 million users in some cases. The lion's share of Edtech spending in China is in the K-12 sector. Most Chinese students are therefore also exposed to advanced adaptive learning technology from an early age.

Demand for qualifications that can be obtained while in employment is growing. Taking time out of the workforce is less and less attractive. This suggests a demand for short courses with assessments.

Private Chinese education providers are emerging as powerful new players in China's education market, offering links with industry and pathways to employment. These large, vertically integrated, multi-site companies bring sophisticated technology infrastructure with digitisation of services from student enrolment to job placement. Australian providers need to develop links with, or understand, these new players.

Panel: School, Vocational, and Non-Award Opportunities

Mr. Brett Blacker, CEO, English Australia

Ms. Mary Faraone, Holmesglen Institute, and Chair, TAFE Directors Australia

Mr. Troy Williams, CEO, Independent Tertiary Education Council Australia

Ms. Sally Webster, Director, Community Languages & International Programs, NSW Department of Education

Public discussion of Australia's international education industry focuses mainly on the higher education sector. Over the longer term, significant opportunities also exist in the VET, English language, schools and non-award sectors.

In recent years, China has signalled a significantly strengthened focus on vocational education, and is investing heavily in this. The new focus reflects concerns over the future of its workforce. China's 2019 National Vocational Education Reform aims is to improve the status of vocational education, and to shift emphasis from quantity to quality.



China has recognised that it needs to learn from practice in other countries, in order to establish a world-leading VET system. The Australian skills framework is well recognised, putting Australian providers in a strong position to contribute to this training capacity. Other Australian strengths include collaborating in teaching and curriculum development with industry. Australia has world leading VET capability in areas including healthcare, tourism, modern logistics.

The number of Chinese students participating in vocational education in Australia has fallen substantially over COVID, reflecting the relative difficulty of moving vocational training online. Lower student numbers are likely to be sustained into this year. This experience may lead to more institutions targeting offshore delivery of education. This approach reduces risks from border closures.

Additionally, Chinese regulators can have closer oversight and therefore more confidence in courses offered. Offshore delivery works well when an Australian provider can partner up with a local partner that has experience in the sector.

TAFE has worked hard to build a presence in China through partnerships with local institutions. TAFE has done feasibility studies on offshore potential markets, and found a rise in demand for digital badging and micro-credentials. These provide pathways to further education, and help employees develop specific skills, while offering a cost effective, flexible means for employers. China's 1+X Pilot program allows vocational institutions and universities to offer an education qualification along with a range of skills certifications. Moreover, there is a growing demand for qualifications that can be gained while in employment.

English language education has been falling as students arrive with higher levels of English proficiency than previously and spend less time on English before taking up a course. Currently, some 50 per cent of English language education by Chinese students is taking place online. Transnational education may provide an opportunity for future expansion in this sector.

The schools sector offers pathways to Australian universities and vocational education. Schools such as Haileybury run campuses in China. Australian schools qualifications are attracting greater recognition in China.

Public Schools in NSW

Some 3000 international students are enrolled in NSW Government Schools, with 50-60% from China enrolling in HSC credentials.

NSW's Public School System is the fourth-largest education system in the world.

NSW Education has supported international students who were not able to return to Australia after COVID.

It has worked with Microsoft to maintain connections from NSW classrooms to the homes of students in China. It has supported student wellbeing, engaging students through WeChat and set up a wellbeing support line.

For those students in NSW unable to return home, it has organised school holiday programs. It has also arranged for the HSC to take place in China simultaneously with examinations held in NSW.

Panel: Work Integrated Learning and Employment Opportunities

Mr. Peter Mackey, Director, International Education and Education Sector Engagement, Investment NSW

Professor Amir Mahmood, Dean, University of Western Sydney Business School

Mr. Ethan Fogarty, Manager, Government Relations, Navitas

Ms. Claire Field, Principal, Claire Field & Associates

Ms. Shi-Shi Truong, Director, Customer Success, Practera



Investment in international education is intimately linked with future career opportunities. The vast majority of Chinese students return to China after their attainment of the qualifications to seek work.

However, surveys have suggested that students perceive that an international education no longer provides the competitive edge in the employment market that it once did. Compared with counterparts that receive a domestic education, those that study overseas miss opportunities to gain work experience and establish relationships that could support their future careers in China. Some believe they have weaker professional skills than domestic graduates.

Chinese students are underrepresented in Work Integrated Learning. This is something that needs to be corrected – not only in terms of numbers, but also impact.

To provide a distinctive and attractive value proposition, the Australian education system needs to offer preparation for the global labour force. There needs to be a conversation about how to offer global employability and leadership.

Unlike students from other countries, most Chinese students do not work while studying. Accordingly, Work Integrated Learning is the first experience many Chinese students have with the work force.

Work Integrated Learning needs to be transformative, offering “professional excellence” to supplement academic learning.

Work Integrated Learning has the potential to become a ‘game changer’ for students.

To be effective, Work Integrated Learning needs to be:

- *Authentic*
- *Provide opportunities for feedback*
- *Personalised and tailored*
- *Mutually beneficial*

There is a need to take a broader view of work integrated learning. Rather than just the private benefits to students and employers, the community needs to recognise the broader economic and social benefits of work integrated learning.

Panel: Establishing a Presence in Market

Mr. David Riordan, Principal Consultant, Thalassa Consulting

Ms. Kath McCollim, Executive Director - Business Transformation, University of Wollongong Global Enterprises

Mr. Nicholas Hunt, CEO, William Angliss Institute

Ms. Yuan Peng, Senior Manager - Global Engagement, TAFE International

Professor Aibing Yu, Pro Vice Chancellor and President (Suzhou), Monash University

Australian institutions from a range of sectors offer education from a base within greater China. Below summarises case studies presented at the symposium, along with learnings from their experience in establishing a presence abroad.

University of Wollongong College (Hong Kong)

- Local entity model – Local accreditation with Australian equivalency, local staff and facilities
- Supported by UoW resources, integrating the new campus into its existing governance structure

In Numbers:

4000 Students

43 Programs

300 Staff

Learnings:

- Importance of establishing trust
- Need to respect cultural differences
- Offering quality product and services essential
- Need to understand the local business environment and to engage with local advice
- Understand and comply strictly with legal requirements

UOW College Hong Kong Campus



William Angliss Institute

- Operates campuses in China through education partners
- Workplace-based delivery in hotels, integrated resorts, hotels and major events

In Numbers:

4 Chinese Education Partners

20,000 Students Worldwide

Learnings:

- Be present in market
- Understand why you are there – mutual benefit and value adding needs to be easy to see.
- Ensure that there is a value case for students; value add for partners; and value pathways beyond the partnership, such as with career trajectories, alumni, and for further study

Institute Partnership - Tourism College of Zhejiang, Qiandao Hu Campus



TAFE NSW Partnerships in China

- Nine TAFE NSW partnerships in China
- Two modes of delivery – accredited, non-accredited

Accredited Courses

- Training by Third Party Provider
- Partner with existing education institutes
- Face-to-face training
- TAFE NSW provides academic support and rigorous Quality Assurance
- Australian Quality Framework certificates

Customised Skills Training (Non-Accredited Courses)

- TAFE NSW Trainers
- Partnering with industry
- Face-to-face/virtual classroom and/or online, self-paced
- TAFE NSW provides end-to-end training delivery from design phase through to project close

Learnings:

- Need to navigate government policies
- Need to adapt to different styles of legal and contractual agreements
- Need to address technological challenges

Institute Partnership - Ningbo City of Vocational Technology



Monash – Suzhou

- Joint Graduate School and Joint Research Institute between Monash and Southeast University, Suzhou (Jiangsu Province)
- Joint Graduate School offers 10 Masters programs in STEM fields
- Joint Research Institute covers – Smart Cities, Energy and environment, Advanced materials, Advanced computation, Life sciences
- Aims to become self-contained/financed after an initial period

Targets for Graduate Enrolments:

Within 3 Years: 1000 Students

Mid-Term: 2000 Students

Long-Term: 4000 Students

Monash - Suzhou Campus

Learnings:

- “The success of international collaboration often depends on individual collaborators. Universities can only establish a platform for such collaboration.”



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An Australian Government Initiative

Principal Partner



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ABOUT THE NATIONAL FOUNDATION FOR AUSTRALIA-CHINA RELATIONS

The National Foundation for Australia-China Relations (the Foundation) is an Australian Government initiative, established in 2020, to strengthen understanding and engagement between Australia and China.

The Foundation is a national platform that works across business, government and communities to strengthen constructive engagement with China and build links across greater China. Working with others, the Foundation provides practical support and expertise, facilitates connections, commissions research, and coordinates training and exchange programs.

Through an annual grants program, the Foundation supports Australian individuals and organisations to develop, promote and strengthen understanding and engagement between Australia and China, including at the business and community level, in support of Australia's national interests.

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