

Executive Summary

Australian International Education 2025 (AIE2025) is a market development plan for Australian international education for the next decade.

This undertaking was initiated by the Trade and Investment Minister, the Hon Andrew Robb AO MP when he set down two challenges to the sector in March 2015. He asked could Australia:

- › Double the number of students and study visitors onshore
- › Reach up to 10 million people offshore

AIE2025 aims to drive a paradigm shift in Australia's international education, training and skills sector to enable long-term sustainable growth in an intensely competitive global market. This requires an expanded definition of what constitutes Australian international education and a focus on the changes needed across the sector, including a 'mindset change' to ensure that it realises its potential to be a key contributor to the future prosperity of both Australia and our international partners.

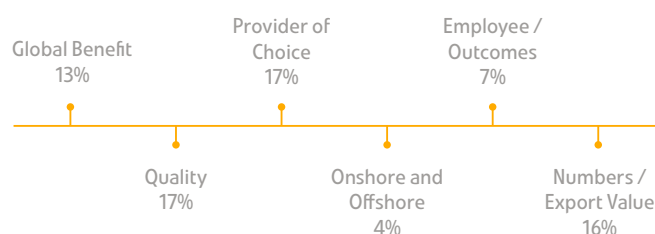
A key stage in the formation of the AIE2025 has been the consultation workshops held in all Australian capital cities, and Townsville, during April 2015. Over 800 people representing diverse perspectives from within and outside the sector attended these 'town hall' style meetings. The topics covered during the workshops included:

- › What could be the vision for this long-term market development plan
- › What are the strategic priorities that would contribute to achieving the overarching vision
- › What mindset changes would be required to drive sustainable growth onshore and offshore

Aspirational visions

A clear, compelling vision is an important element of a long term market development plan, as it can become a catalyst to change the narrative and a focus of collective action across the industry. During the workshops participants were asked to consider an aspirational vision for the sector. Analysis of the individual aspirational visions provided by participants identified that they fell broadly into six key categories.

The range of aspirational visions can be viewed in terms of occupying different points along a continuum – with 'global benefit' at one end and 'numbers / export value' at the other. The six categories, including their relative weighting, are shown below.



The following statements are direct transcriptions of individual aspirational visions and are a sample of the kinds of visions under each of the headings:

- › **Global Benefit** – Australia is a world-leading education provider that facilitates international exchange, engagement, capacity-building and global cooperation
- › **Quality** – Australia educating the world – market leader for global quality education
- › **Provider of Choice** – Australian education is the #1 choice globally in key strength areas
- › **Onshore and Offshore** – A sustainable, growing sector involving onshore and offshore and all sectors and new and established providers
- › **Employability / Outcomes** – Australian education and training as a foundation for success anywhere in the 21st century
- › **Numbers / Export Driven** – Australia's #1 export (onshore and offshore activity)

Ultimately the strategy will need to be guided by one overarching vision. The ultimate articulation of the overarching vision will be further tested in the second half of 2015 to ensure that it has the greatest meaning for the broadest number of stakeholders.

Strategic priorities

Participants identified a wide range of strategic priorities needed to achieve long-term sustainable growth in the sector. Analysis of the strategic priorities – or enablers that help us reach our overarching aspiration – identified a list of 22 different categories. The top eight in that list are outlined below, including their relative recurrence and an indicative example:

- **Student Experience 12%** – Invest and collaborate to improve the international students experience (accommodation, transport and community integration)
- **Collaboration 12%** – the entire education sector on board and working collaboratively to achieve 2025 goals
- **Reputation and Branding 10%** – Our value proposition – why Australia?
- **Innovation 10%** – Focus on innovation and technology to reach maximum potential students
- **Quality 7%** – Realistic expectations, responsive to trends, get as much education as we can at price point
- **Employability 7%** – Prepare students to be job ready in Australia and the world
- **Government Coordination 7%** – Consistent, national / state / local support – all levels of government united in agreement, mutually supportive
- **Diversification 6%** – Diversify existing markets and develop new ones, think beyond higher education

Experts have identified that plans with fewer strategic priorities are the more likely to be implemented, as they provide sharper focus on fewer areas of high importance. Thus, a long term market development plan will ideally have just three or four key priorities. Further work will be needed to synthesise and interpret the priorities gathered to date.

Mindset change

Systemic level change experts, such as Donella Meadows (*Places to intervene in a system*) say that to achieve fundamental systemic change we must work at the level of paradigm or mindset change. While the aspirational vision and strategic priorities provide the ‘why’ and ‘what’ for the market development plan, the mindset change discussion revealed opportunities as to ‘how’ the industry may transform itself in order to achieve its bold aspiration. Participants identified opportunities to effect paradigm change:

- **Onshore** – Need to influence and change community, employer and political leaders mindsets – show the benefits and value of international students; address infrastructure constraints; and strengthen ‘brand Australia’ by working as collaborators, not competitors
- **Offshore** – re-define ‘student’ for offshore context, e.g. customer, client, student; leverage areas of Australian expertise, e.g. agribusiness for education, training and skills offshore; move beyond only accredited education and training, e.g. huge opportunities for ‘corporate training’; and leverage technology and digital platforms

Next steps

The insights gained through the consultation workshops will be considered further through subsequent stages of the creation of the market development plan. These stages will include:

- Round tables with industry leaders and Minister the Hon Andrew Robb AO MP during August and September 2015
- Research by Deloitte Access Economics, partnered with EduWorld, to be delivered in September 2015
- workshops with an industry advisory group and sector peak bodies during September 2015