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Key international developments affecting Australian education and training

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ABSTRACT

Education and training in Australia are increasingly operating in an internationalised environment. Overseas students are major sources of funds and enrolments, Australian institutions operate overseas and form a wide range of international partnerships, and holders of Australian qualifications work throughout the world. This paper discusses three sets of international developments and outlines their potential implications for Australian education and training: the development of bilateral Free Trade Agreements between Australia and individual countries in the Asia-Pacific region; the initiatives of groups of countries such as ASEAN and the East Asia Summit to strengthen educational cooperation on a multilateral basis; and, overshadowing all, the rapidly worsening international economic outlook.

INTRODUCTION

Education and training in Australia are becoming increasingly internationalised. In 2007 there were some 370 000 international students studying in Australia and a further 120 000 enrolled in Australian courses offshore. The number of international students studying in Australia has more than doubled since 2000. Australian institutions, students, teachers and researchers participate in an increasingly wide range of international activities.

Around 18% of Australia's tertiary enrolments are by international students (OECD, 2008). This is the highest proportion among the 19 OECD countries for which comparable data are available, and is well above the OECD average of 7%. Among the other OECD countries only New Zealand (16%), the United Kingdom (14%) and Switzerland (14%) come close to the Australian proportion.

The broad dimensions of international student enrolments in 2007 in Australia are outlined in Table 1. Just under 150,000 (40%) of all international students were enrolled in higher education, 94,000 (25%) were in VET, 81,000 (22%) were enrolled in English Language Intensive Courses for Overseas Students (ELICOS), 24,000 (6%) were in schools and a similar proportion were in other courses. The proportion of international students enrolled in higher education has fallen from about 47% in 2000 as enrolments in other sectors have generally increased more rapidly.

Table 1 shows that the top eight source countries between account for just under two-thirds (64%) of international students in Australia (AEI, 2008a). China (22%) and India (14%) are by far the largest source countries. Economic and social developments in these countries are going to have the largest impact on international education enrolments in Australia. The table indicates that students from the main source countries differ in how they are distributed among the various sectors of Australian education and training. For example, the large majority (77%) of Malaysians studying in Australia were enrolled in higher education in 2007 and only 2% were in ELICOS. On the other hand, only 18% of Koreans studying in Australia were enrolled in higher education and 40% in ELICOS. These data underscore the need to be cautious of generalisation when discussing

international education as the factors that shape the demand for places in different sectors in Australia vary from country to country.

Table 1: International students by source country and sector enrolled, 2007¹

Country	Total students (% of all internat. students)	Percentage distribution by sector				
		Higher ed. %	VET %	ELICOS %	Schools %	Other ² %
China	82 539 (22.2%)	45.8	16.2	23.3	11.2	3.5
India	51 762 (13.9%)	42.8	41.4	14.8	0.1	0.9
Korea, Rep.	27 751 (7.5%)	18.3	22.0	40.0	17.4	2.3
Malaysia	18 575 (5.0%)	77.3	12.8	1.7	3.9	4.2
Hong Kong	16 073 (4.3%)	47.9	24.2	10.7	8.2	8.9
Thailand	14 731 (4.0%)	25.7	33.2	36.2	3.8	1.1
Japan	13 418 (3.6%)	20.1	25.7	40.5	8.6	5.1
Indonesia	12 464 (3.4%)	54.2	26.9	10.7	3.4	4.8
Other countries	134 378 (36.2%)	36.4	26.5	21.1	3.7	12.4
Total	371 691 (100%)	40.1% (149 048)	25.4% (94 410)	21.8% (81 029)	6.4% (23 788)	6.3% (23 417)

Notes:

1. The table records international students studying in Australia on a student visa. International students studying offshore in an Australian course are not included. In 2007 there were approx. 120 000 such students.

2. 'Other' includes study abroad, foundation, enabling and other non-award courses that do not lead to a qualification under the Australian Qualifications Framework.

Source: Australian Education International (2008a). "International student numbers", *Research Snapshot*, No. 37, May. Canberra: AEI.

Income from International Education

International education activity contributed \$12.5 billion in export income to the Australian economy in 2007, up 17% since 2006 (AEI, 2008b). Around \$12.2 billion was spending on fees and goods and services by onshore students, and \$370 million from other education services such as offshore students' fees and education consultancies. Over the 10 years to 2007 education exports have grown at an average rate of 15% compared to average rate of 6% across all services exports. Education is the third largest export sector behind coal (\$20.8 billion) and iron ore (\$16.1 billion) and largest services exporter ahead of tourism (\$11.8 billion).

Higher education currently brings in the majority of revenue from international students (63%) and, apart from the ELICOS sector, is probably the most vulnerable to any downturn in international student numbers. Universities rely on international student fees for about 15% of their funding, and in some individual universities this proportion would be much higher.

Overview of the Paper

Developments in the international arena are increasingly important influences on Australian education and training. Australia is not a passive 'recipient' in this process: Australia plays a significant role in attempting to influence the direction of international developments as they affect education and training, particularly in the Asia-Pacific region.

This paper discusses three sets of international developments and outlines their potential implications: the development of bilateral Free Trade Agreements between Australia and individual countries in the Asia-Pacific region; the initiatives of regional groups of countries to strengthen educational cooperation on a multilateral basis; and, overshadowing all at the moment, the rapidly worsening international economic outlook. The first two sets of developments have the potential to further deepen the international integration of Australian education and training. The current economic crisis has the potential to reverse, or at least slow down, the growth of international student numbers in Australia.

FREE TRADE AGREEMENTS AND EDUCATION

Australia's first Free Trade Agreement was formed with New Zealand in 1988 (Closer Economic Relations), and it took 15 years for the second, with Singapore, to be signed in 2003. The focus on FTAs has increased sharply in recent years, with three more being signed: Thailand (2005); United States (2005); and Chile (2008). Australia currently has five more FTAs under negotiation: with the 10-member Association of Southeast Asian Nations (ASEAN), China; the Gulf Cooperation Council, Japan, and Malaysia. Three other countries have recently agreed with Australia to jointly investigate the feasibility of an FTA: India; Korea; and Indonesia. Most of the countries with which Australia has already concluded an FTA, or has one under negotiation or consideration, are major sources of international students for Australia.

Japan and New Zealand are other countries that are actively pursuing FTAs in the Asia-Pacific region. For example, New Zealand has recently signed FTAs with Singapore, Thailand and China. Japan has individual FTAs with the majority of the ASEAN countries.

The growing willingness of countries to commit to bilateral FTAs is partly driven by frustration at the slow pace of multilateral negotiations to open up trade. It is also influenced by what one's trading competitors are doing. If a country with which Australia competes obtains better market access to an importing country through an FTA (as well as obtaining cheaper imports from that country), that can increase the pressure on Australia to obtain equivalent access for their exporters. On the other hand, while each individual FTA may be mutually beneficial in its own terms, the growing number of bilateral FTAs can increase the costs and complexity of trading where different regulations apply to different markets (Hillberry, 2006). It is also possible that the growing number

of FTAs around the world makes it harder to achieve progress in multilateral negotiations to reduce tariffs and other barriers to trade.

Some of the barriers to trade in education services, and which may bring education within the scope of FTAs are:

- non-recognition of periods of study and qualifications undertaken in one country for enrolment or employment in another country;
- visa requirements of various kinds that affect the capacity to move freely for study abroad; and
- restrictions on the right of overseas education providers to establish institutions or programs, including planning controls and the need for some local ownership in the business.

The sections of FTAs which deal with services such as education follow a framework derived from the General Agreement on Trade in Services (GATS). Liberalisation of trade under the GATS is based on the three concepts of market access, national treatment, and most favoured nation treatment. Parties to an FTA make commitments going beyond their commitments in GATS to liberalise trade in services. Commitments are listed in schedules to the FTA either on a positive or negative basis (i.e. liberalisation takes place only in the sectors specifically committed in the schedules, or in all sectors except those covered by reservations in the schedules).

Current FTAs in the Asian Region

The implications for educational cooperation of the growing number of FTAs among the 16 member countries of the East Asia Summit (EAS) area were examined by McKenzie et al. (2008).¹ Specific areas examined were: (1) the extent to which one party to the FTA accords market access, national treatment and most favoured nation status to suppliers of education and training services domiciled in the area of another party; (2) the treatment of professions, including recognition of qualifications; and (3) specific commitments to educational cooperation.

Based on the 19 FTAs examined, “Education Services” is an area specifically excluded from most FTAs, or at least not as extensively liberalised as trade in other service areas. Generally, the FTAs provide for more liberalisation in the market for tertiary education than for school education, but even that tends to be relatively circumscribed. For example, it is common to include a commitment to negotiations to achieve mutual recognition of qualifications, while holding back from providing immediate recognition.

One of the most liberal FTAs in terms of education is that between Australia and Singapore (2003). Singapore has provided full national treatment and market access commitments for university, adult and vocational and technical education, with only limited exceptions. The Australia-Singapore FTA also provides for educational cooperation across eight broad fields, including mutual recognition of qualifications, joint research programs and staff exchanges. The relatively extensive liberalisation of education services contained in the Australia-Singapore FTA reflects both the general policy outlook of the two governments concerned, as well as the fact that Australia and Singapore have achieved similar levels of economic, social and educational development. The FTA between Singapore and Korea, another advanced economy, is also relatively liberal in regard to education services. That FTA included agreement to facilitate the launch of double degree

¹ The East Asia Summit is a forum held annually among 16 countries. It met for the first time in 2005 and comprises the 10 member countries of ASEAN (Brunei Darussalam, Cambodia, Indonesia, the Lao People’s Democratic Republic, Malaysia, Myanmar, the Philippines, Singapore, Thailand, and Viet Nam) plus Australia, the People’s Republic of China, the Republic of India, Japan, the Republic of Korea, and New Zealand.

programs between higher education institutions in the two countries, and joint provision of technical assistance in education for developing countries.

Where countries differ greatly from each other in terms of levels of development it can be difficult, for different reasons, for both parties to agree to liberalise trade in education services and the mobility of labour. Such a situation often applies in the Asia-Pacific region where there is great diversity among countries. In particular, mutual recognition of educational qualifications will only occur if each party to an FTA has confidence about the equivalence of the educational systems of the other parties. That in turn implies robust arrangements for the regulation of key aspects of provision in each country, notably for quality assurance and provider accreditation. This is an aspect of educational cooperation in which multilateral organisations such as the EAS could be significant, and in which Australia is already playing a leading role (e.g. see Baird, 2006; and Centre for International Economics, 2008).

To date it would seem that FTAs in the Asia-Pacific region have made only a modest contribution to the rapid growth in international trade in educational services that has occurred in the past decade. This is due to the fact that most FTAs have only recently been concluded and their provision for education services is quite limited. Nevertheless, FTAs are a development whose impact on Australian education and training can be expected to grow given the number of FTAs now in train, including with very large trading partners such as China and India, the general rise in income and demand for education in the region, and growing awareness of the mutual benefits that cross-border education services can bring (Vincent-Lancrin, 2007).

MULTILATERAL COOPERATION IN EDUCATION

In 2007 the leaders of the 16 EAS countries, including Australia, agreed to strengthen educational cooperation. Similar regional initiatives are underway elsewhere. The most extensive developments are those occurring in Europe through the Bologna Process in higher education, but cooperative activities of various kinds are also underway in other major regions e.g. Africa, the Middle East and North America. These developments reflect a common concern to strengthen educational systems to better compete in global markets, to build a greater sense of regional community, and to reduce inequalities between and within countries.

A study by McKenzie et al. (2008) was initiated by the ASEAN Secretariat on behalf of the EAS to develop educational cooperation into an important strategy for the region.² The focus was on identifying what works in educational cooperation, what are the key success factors, and how the benefits of successful initiatives could be more widely spread. It concentrated on cooperation at government-to-government level, and the role that governments can play in stimulating, supporting and, where necessary, regulating educational cooperation to maximise its contribution.

The study found that the most extensive types of educational cooperation in the EAS region relate to students and staff travelling abroad and information exchange, especially in the higher education sector. In regard to regulatory reform there appear to be increasing levels of interest in skills recognition, qualifications recognition, qualifications frameworks, and quality assurance. These are areas in which governments are uniquely well placed to share policy experiences and to harmonise regulatory frameworks.

It is clear, though, that the available data underestimate the actual nature and volume of educational cooperation activities underway in the region. Most countries noted that very little data is collated at central level about international cooperation at the level of education and training institutions, let alone the staff and student levels.

² The project was supported through the Regional Economic Policy Support Facility (REPSF II) of the ASEAN-Australia Development Cooperation Program (AADCP). This section draws on the final report by McKenzie et al. (2008).

International student flows are of increasing importance in regional education. The data relate mainly to higher education and have a number of limitations. With those cautions, the main findings are:

- The total number of international students from EAS countries studying at tertiary level in other countries across the world rose by almost 90% between 1999 and 2005, from 440,000 to 835,000. Of the students in 2005, about 140,000 are from ASEAN countries and about 695,000 from countries elsewhere in the EAS area.
- Almost 90% of the growth in numbers between 1999 and 2005 is accounted for by students from China and India.
- International flows of tertiary students have grown faster within the EAS area than the flows between EAS member countries and countries outside it.

Scholarship schemes are quite small relative to international student flows. There seems to be consensus among donors and recipients that to get best effect from a limited number of scholarships, a focus on post-graduate studies and on students with high potential is needed.

The increase in student flows exerts pressure for convergence between national higher education systems in fields such as quality assurance, the transfer of study credits, the recording of achievements and qualifications, and information about qualification structures and pathways. Increasingly countries are recognising the need to address these matters, and the necessity of international cooperation in doing so, but with caution because of different starting points.

The main benefits from enhanced educational cooperation are as follows:

- *For governments:* greater choice in education and training with lower costs, alignment of system to the requirements of a more globalised workplace, and laying the foundations for regional economic integration;
- *For educational institutions and their staffs:* expanded educational networks, assistance with training the next generation of educators, shared experience and resources leading to stronger programs and standards, developing competitiveness with institutions in other regions;
- *For students and graduates:* broadened educational experiences, increased mobility in tertiary education and in the labour market, and more choice through more open and flexible education systems.

Recommendations for Strengthening Educational Cooperation

The report developed a set of recommendations for strengthening educational cooperation in the EAS region. They included recommendations for clarifying the objectives of more actively working together in education, priorities for common action, and processes for moving forward. In particular the report drew on extensive consultations to recommend seven priority areas for greater regional cooperation:

- The teaching and learning of foreign languages.
- The teaching and learning of mathematics and science.
- Education for mutual understanding.
- Enhancing the quality of school teaching.
- Enlarging access to education.
- Strengthening Technical and Vocational Education and Training, in particular through supporting moves towards more demand-driven TVET systems, the accrediting of TVET providers and statistical standards for monitoring and evaluation of the sector, and developing a regional network of leading TVET institutions.

- Strengthening Higher Education, in particular through the enhancement of mobility and choice through the harmonisation of quality assurance, study credit and qualifications systems, and the expansion of exchanges and scholarships.

The report noted that countries often lack systematic information about their own international cooperation activities, developments in other countries or good practice in effective strategies for harnessing educational cooperation. It therefore recommended that the EAS group of countries investigate options for: (a) developing comparable data bases to document international education cooperation activities in the region, including more detailed data on student flows, (b) strengthening evaluation of the impacts of cooperation activities and the factors associated with program effectiveness; and (c) disseminating good practice in educational cooperation throughout the region.

The report and its recommendations are currently under consideration in the various ASEAN and EAS forums. If accepted and implemented in all or part they will provide further momentum to the range of educational cooperation activities already underway in the EAS region, including many in which Australian education and training is already closely involved.

THE INTERNATIONAL ECONOMIC OUTLOOK

As was noted in the introduction, Australia enrolls a higher proportion of international students than any other country and international students make major contributions to the income of education and training institutions. Therefore the rapid deterioration in the world economic outlook in recent months probably poses even more risks for Australia than for other countries. The prospect of prolonged economic downturn raises questions about the prospective demand for education places, international students' capacity to finance their studies, and how national governments may respond.

The situation is highly volatile and difficult to predict with any confidence. Many different factors shape the demand for education in different countries and how it can be financed, and Australia draws students from a wide range of diverse nations. This section tries to sketch out, in a highly qualified way, some of the main factors that could come into play.

Projections for Economic Growth

Table 2 summarises the most recent projections on the economic outlook prepared by the International Monetary Fund (IMF). The projections themselves are highly volatile. In July 2008 world output was projected to be 4.1% in 2008 and 3.9% in 2009. By October 2008 these had been revised downwards by 0.2% and 0.9% respectively, and there are concerns that they still remain too optimistic.

World output, which grew by 5% in 2006 and 2007, is projected to decline to 4% growth in 2008 and 3% in 2009. By far the biggest decline would be in the advanced economies (which account for about 60% of world output) from 3% growth in 2006 to a projected 0.5% in 2009. If realised, this slowdown in economic growth would be accompanied by increased unemployment in the advanced economies – projected to be 6.5% in 2009 compared to 5.7% in 2006. As unemployment generally lags economic activity, unemployment would probably rise even further in 2010.

Relative to the other advanced economies Australia is projected to slow by a smaller proportion. Table 2 indicates that the IMF predicts economic growth in Australia to be 2.5% in 2008 and 2.2% in 2009, down from 4.2% in 2007. The projected declines in the other advanced economies which are major destinations for international students are even more marked. For example, economic growth in the USA is projected to be just 0.1% in 2009 and negative in the UK.

The apparently deeper recessions in competitor countries may lead to comparatively sharper rises in domestic student enrolments in those countries and perhaps less spending on overseas student

scholarships. If realised, such factors could benefit international enrolments in Australia as such students would be less 'crowded out' here.

Table 2: IMF World Economic Outlook Projections, October 2008

	Actual (Year on Year %)		Projected (Year on Year %)	
	2006	2007	2008	2009
World output	5.1	5.0	3.9	3.0
Advanced economies	3.0	2.6	1.5	0.5
Emerging and developing economies	7.9	8.0	6.9	6.1
<i>Countries with high proportions of international students</i>				
Australia	2.7	4.2	2.5	2.2
USA	2.8	2.0	1.6	0.1
UK	2.8	3.0	1.0	-0.1
Euro area	2.8	2.6	1.3	0.2
Canada	3.1	2.7	0.7	1.2
New Zealand	1.9	3.2	0.7	1.5
<i>Countries that are major sources of international students in Australia</i>				
China	11.6	11.9	9.7	9.3
India	9.8	9.3	7.9	6.9
Korea, Republic	5.1	5.0	4.1	3.5
Malaysia	5.8	6.3	5.7	4.8
Hong Kong	7.0	6.4	4.1	3.5
Thailand	5.1	4.8	4.7	4.5
Japan	2.4	2.1	0.7	0.5
Indonesia	5.5	6.3	6.1	5.5

Source: International Monetary Fund (2008), World Economic Outlook October 2008, Washington DC: IMF.

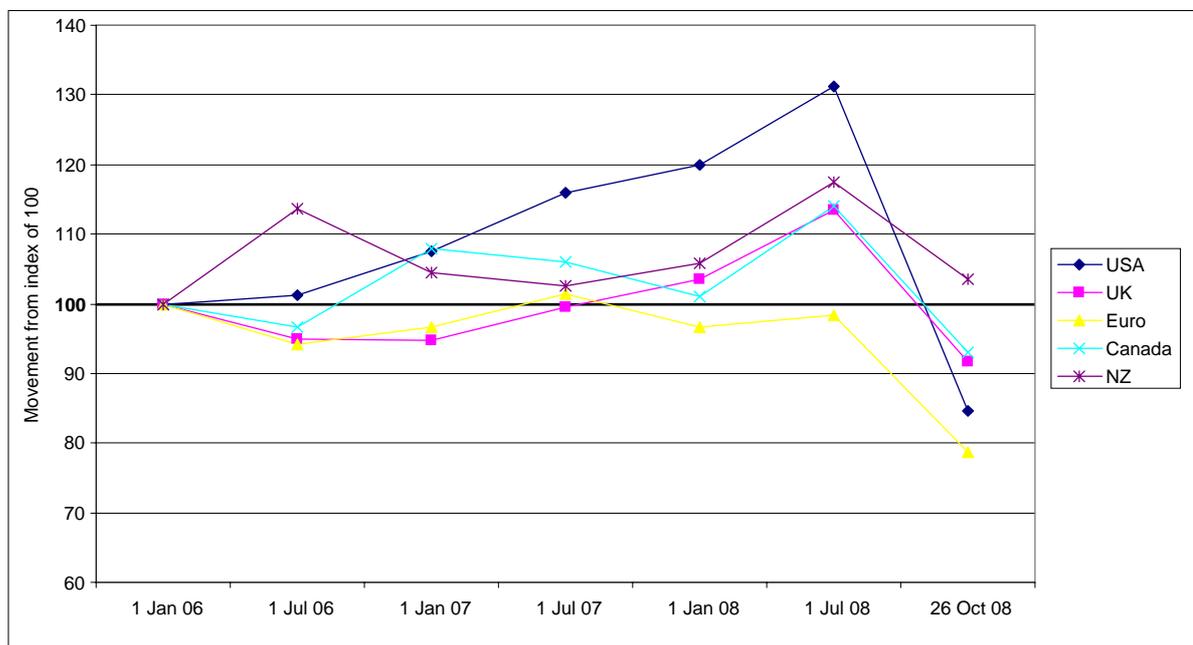
The IMF projects that economic growth in the developing economies will also decline, but to a lesser extent than in the developed world. Most of the major source countries for international students in Australia are in this group. For example, the IMF projects that growth in China in 2009 will be 9.3% (down from 11.9% in 2007) and in India 6.9% in 2009 (down from 9.3% in 2007). Of the major source countries for Australian international education, only Japan is projected to experience a large fall in economic growth.

On the face of it, Table 2 suggests a reasonable outlook for international education in Australia as the major source countries continue to grow and the major competitor countries experience even more marked economic downturns than in Australia. However, great caution is needed. There are many doubts about whether the projections are too optimistic, and whether the emerging economies are really likely to be insulated from the effects of a prolonged downturn in advanced countries.

Exchange Rate Movements

Figure 1 plots recent exchange rate movements in the Australian dollar relative to the currencies of five other countries that are major providers of international education. (The analysis in AEI 2006 covers the 2002-2006 period.) Between January 2006 and July 2008 the Australian dollar appreciated strongly against the US dollar (by about 30%) and against the UK, Canadian and NZ currencies by about 15%. The Australian dollar had been relatively stable against the Euro over this period. However, in recent weeks the Australian dollar has depreciated markedly (by about 35% against the US dollar, about 20% against the UK pound, Euro and Canadian dollar, and about 12% against the NZ dollar. Against some currencies the Australian dollar is now at a 5-year low.

Figure 1: Australian Dollar Exchange Rate Movements Relative to Currencies of Major Countries Providing International Education, 1 January 2006 to 26 October 2008 (index = 100 at 1 January 2006)

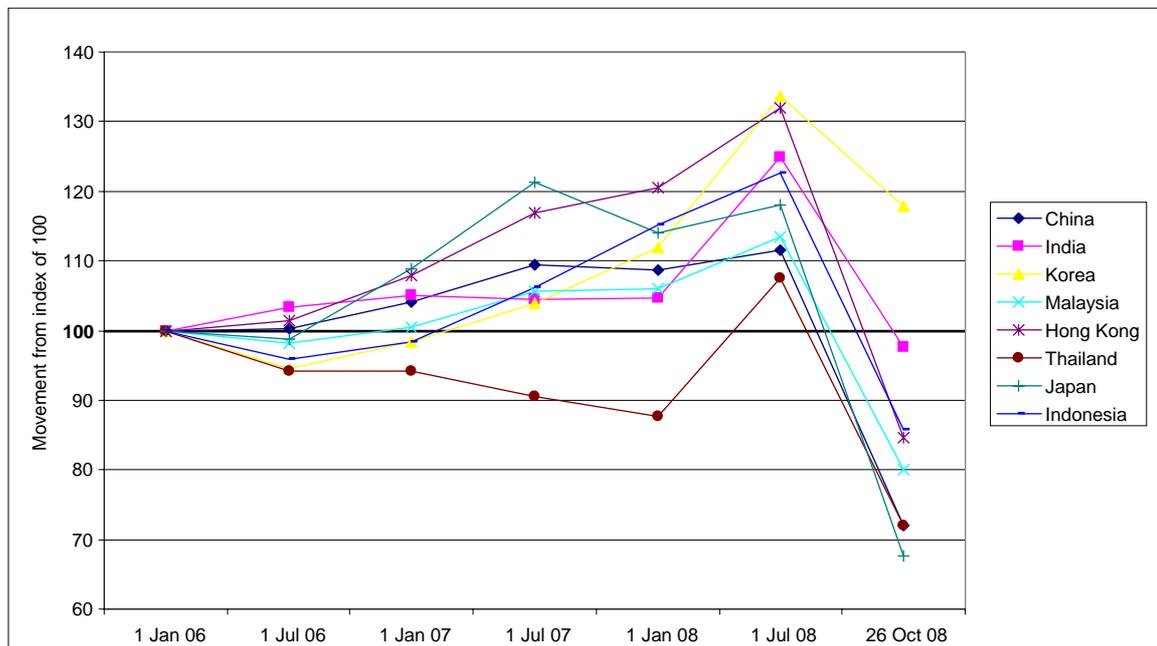


Source: Oanda (<http://www.oanda.com>)

As the past month has shown, currency swings are becoming more volatile and the outlook is problematic. However, if the current relative position of the Australian dollar is sustained for any length of time, this would have the effect of making Australia a more competitive destination for international students, provided other factors stay broadly the same.

Figure 2 plots relative exchange movements in the Australian dollar against the currencies of the eight largest source countries for international enrolments in Australia. In the period from January 2006 to quite recently the Australian dollar appreciated against all of these currencies, and in some cases quite strongly e.g. for Hong Kong and the Republic of Korea by over 30%, India by about 25% and Indonesia and Japan by about 20%. These rises have had the effect of making study in Australia more expensive for people from these countries (although this would have been partly offset by a rise in the value of any remittances from Australian earnings sent to their home countries). Nevertheless, international student enrolments have continued to grow. This reflects a rising demand for education, capacity constraints in many Asian countries, and positive perceptions of the value of an Australian education.

Figure 2: Australian Dollar Exchange Rate Movements Relative to Currencies of Major Source Countries of International Education Students, 1 January 2006 to 26 October 2008 (index = 100 at 1 January 2006)



Source: Oanda (<http://www.oanda.com>)

Over the past few weeks the Australian currency has declined sharply against the currencies of all the major source countries for international students: by over 40% against the Japanese yen, by over 30% against the Chinese, Hong Kong, Malaysian, Thai and Indonesian currencies, by over 20% against the Indian rupee, and about 12% against the Korean won. These changes have the effect of substantially decreasing the costs of international study in Australia for students from these countries.

In terms of currency movements, the present situation is quite different to the Asian financial crisis of 1997 and 1998. At that time the currencies of the major Asian countries depreciated sharply (the major ASEAN currencies declined by 25% to 35%) and thus increased the cost of overseas travel and study for students from those countries. Even so, total international enrolments in Australian education continued to grow during this period, albeit at a reduced pace (ABS, 2002).

Nevertheless, although total international enrolments continued to grow during the Asian financial crisis, there were substantially different experiences among source countries and between different sectors in Australia. For example, there was a decline in education arrivals from Indonesia, Hong Kong and Malaysia and this was clearly linked to fewer people travelling to study because of increased cost (Dobson et al 1998), while enrolments from the USA rose. The ELICOS sector was hit particularly hard during this period, and experienced a 40% decline (Blundell, 2008).

Nevertheless, even if the recent depreciation of the Australian dollar means that study in Australia has become more affordable, this does not necessarily mean that demand for international education places will rise. The credit squeeze may make it more difficult for families to raise loans in their home country to finance study abroad (Taplin, 2008). Furthermore, it is possible that rising unemployment in Australia may make it harder to obtain the part-time jobs that many students rely on, and the government may be under pressure to tighten student visa regulations.

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