

English Australia

Draft National Strategy for International Education questionnaire

Please outline your (or your organisation's) interest in Australian international education. Add any other relevant content.

Response:

English Australia is the national peak body for the English language sector of international education, and represents over 120 member colleges throughout Australia that provide quality English language programs to students and professionals from around the world. 88% of international students learning English in Australia in 2014 chose to study with an English Australia member college.

Member colleges include single campus language centres that deliver only ELICOS, multi-campus (multi-city) language centres, language centres that are part of large international groups, university based language centres, RTO based language centres and TAFE based language centres.

The English Australia *Survey of Regional Markets for ELICOS Institutions in 2014* (supported by the Australian Government Department of Education and Training) revealed that 163,542 international students commenced English language programs in Australia in 2014, surpassing the previous peak year of 2008 to record a new high in the number of ELICOS students including enrolments on all visa types.

The ELICOS sector plays an important role in a number of areas related to international education and other service exports.

Many international students cannot successfully undertake studies within other education sectors without support in developing the necessary English language skills.

The ELICOS sector provides an essential “pathway” role in assisting international students to develop the English language skills they require to be successful in further studies at Schools, TAFE colleges, VET colleges and Universities. ELICOS is a fundamental component of the typical international student course plan, not only developing their English language skills, but also providing them with the study skills they need to be successful in the Australian context. International students who undertake English language study in Australia are also more likely to undertake their further study programs in Australia.

The Department's latest pathways data shows that 65% of student visa holders finishing ELICOS in 2013 commenced a course in another sector in 2014. This means that in 2014 approximately:

- 70,000 student visa holders undertook pathway ELICOS;
- 93,500 student, visitor, working holiday and other visa holders undertook stand-alone ELICOS.

Both pathway and stand-alone segments are important to the diversity and ongoing sustainability of the ELICOS sector.

English is increasingly being seen amongst ‘serious’ students as an end rather than just a means to further study.

English is increasingly considered a core competency in a globalised economy.

“English is increasingly a core element in determining employability. For example, in India, employees who speak fluent English earn on average a 34% higher hourly wage than those who do not speak English; even those who can speak a little English earn 13% more than those who cannot.

The interaction between English proficiency and gross national income per capita suggests a virtuous cycle, in which improving English skills drive up salaries, which in turn give governments and individuals more money to invest in English training. Based on anecdotal evidence, the relationship also applies on a smaller scale, where improved English skills allow individuals to apply for better jobs and raise their standards of living.”¹

The ELICOS sector adds a further dimension to Australia’s appeal as a tourism destination.

In 2014 34% of ELICOS students undertook English language courses whilst they were visiting Australia on Visitor, Working Holiday or Other visas, with this proportion reaching as high as 50% of the ELICOS student cohort in previous years. Australia’s ability to provide English language training within an English speaking environment adds a further dimension to its appeal as a tourism destination, with visitors combining English language study with travel opportunities. ELICOS colleges also provide a large number of study-tour programs for groups. These short programs provide potential long-term students with the opportunity to experience the quality of education that Australia has to offer.

The ELICOS sector plays a vital role in opening up new markets for international education.

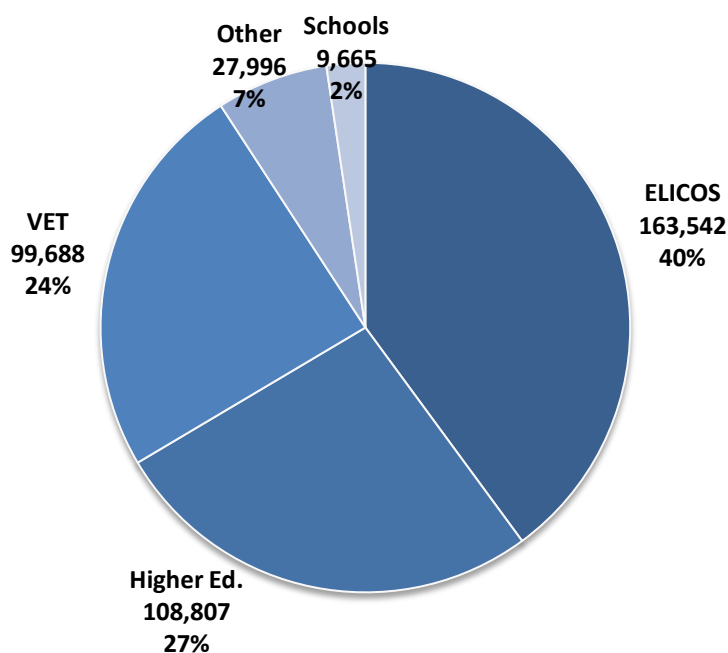
An important element of Australia’s international education strategy is that of diversification and there are a number of emerging markets which the industry is currently developing in order to further this strategy. In these countries the profile of Australia’s education services is relatively low and there is an identified trend that international students from emerging markets tend to undertake short preliminary ELICOS courses in order to increase their knowledge of Australian further study institutions and confirm their plans for further study. The ELICOS sector has always been entrepreneurial in moving into new markets, with the initial starting point being short English language courses which require low financial investment and low risk on the part of students. These short courses have traditionally provided a platform for raising the profile of Australia as a destination for international students and establishing a ‘critical mass’ of students who have had an educational experience in Australia.

¹ EF English Proficiency Index (fourth edition) <http://www.ef-australia.com.au/epi/>

The ELICOS sector has enormous impact.

From the perspective of evaluating the impact of each sector in terms of the number of students whose lives it influences, ELICOS is the largest sector when considering the number of new international students who commence study in Australia each year. The experience that these students have in the ELICOS sector will influence future decisions regarding further study as well as recommendations to friends and family.

Fig.1 2014 commencements - all visa types



Does the vision statement in the draft strategy represent Australia's aspirations for international education?

Response:

No. It is English Australia's view that the vision statement contained in the *Draft National Strategy for International Education* (the Strategy) reflects the current reality rather than an aspirational vision for 2020.

A more aspirational vision would incorporate a broader recognition of the contribution made by international education:

*"Australian international education is **recognised and valued as** a core element of Australia's economic prosperity, social advancement and international standing."*

Are any significant goals for international education not adequately covered?

Response:

Yes.

Coordination & Leadership

The development of a national strategy and associated work plan is the second recommendation of the report *Australia – Educating Globally*, provided to the Australian government in February 2013 by the International Education Advisory Council, chaired by Mr Michael Chaney AO. However, the first and most keenly-anticipated recommendation was the establishment of a Ministerial Coordinating Council on International Education (MCCIE). Neither the previous nor the current governments have yet brought an MCCIE into existence with no progress therefore in addressing the following key strategic aim identified in the report:

“Ensure improved coordination of government policy and programs for international education and better consultative mechanisms for stakeholders, in order to optimise government support for the international education sector.”

The importance of this was well captured a year and a half ago in November 2013 by the 47 stakeholders who participated in the English Australia Scenario Planning Day.

The participants were tasked with devising four scenarios on the future of the ELICOS industry projecting five years forward ranging from the least unaligned and competitive to the most optimistic scenario.

The most pessimistic scenario began with the following:

“The lack of a commonly held strategic vision and plan for the international education industry results in uncoordinated and contradictory policy settings, a focus on managing risk that removes all incentive and capacity to innovate and an industry that is focused internally rather than on external opportunities and on survival rather than growth.” (Appendix A)

Whilst the Strategy states that two roundtables will be held in 2015 (and the first of these has been scheduled), this does not provide the necessary confidence that the issue of better coordination and leadership has truly been addressed. Nor is there clarity around the ‘architecture’ that will ensure that all key stakeholders have ownership of the Strategy and that there is accountability for driving the goals and reporting on success against commonly agreed measures. The Strategy will otherwise just be a document that sits on a shelf and has little relevance.

Community Engagement

The Strategy lacks a comprehensive plan for community engagement and the appropriate degree of emphasis for what should be a core element of the Strategy. International education is attracting more general public attention as services assume greater importance in national economic development and trade and international students play a more prominent role in our institutions and our communities. Much of that public and media attention has been negative.

Goal 5.6 in the Strategy takes a narrow view of community engagement, addressing Recommendation C3 of the Chaney report but not the broader goal of ensuring public recognition of the importance, contribution and value of international education to Australia.

English Australia recommends that the Chaney report recommendation to *“Develop and implement a communication campaign to articulate the many economic and cultural benefits that international education and students bring to Australia”* (Recommendation G2) should be revisited and incorporated in the Strategy.

Can you identify the strategic actions which best support your goals for international education?

Response:

1.1. Embracing the freedom to achieve excellence

This strategic action is important for English Australia and the ELICOS sector. One of the goals in English Australia’s Strategic Plan 2014-2017 is to *“Lead industry best practice and innovation”*.

The Strategy makes no mention of the ELICOS sector within this specific strategic action, nor any reference of a commitment to acknowledge or support best practice and innovation across the ELICOS sector.

1.3. Supporting better information on quality performance

This strategic action is important for English Australia and the ELICOS sector.

The Strategy again makes no mention of the ELICOS sector within this specific strategic action. The ELT Barometer project (supported by the Australian Government Department of Education and Training) plays a key role in enabling the sector to benchmark ELICOS student satisfaction with their experience between providers in Australia as well as with those in other countries. In the absence of any other source of information regarding quality learning outcomes, this is a key driver for the sector in the area of continuous improvement.

1.4. Providing quality assurance while reducing red tape

This strategic action is important for English Australia and the ELICOS sector but is disappointing in the way it is articulated in the Strategy.

There is no commitment in the Strategy to doing any more than is already being done. The measure of success for this action should not just be about the reduction of red tape, but ensuring that students, their families, education providers, employers etc. all have confidence in the quality of providers that are registered on CRICOS. Australia’s reputation is currently being damaged by the lack of action in this area and the Strategy gives no confidence that anything is going to change.

4.2. *Marketing Australia as a high-quality education destination*

This strategic action is important for English Australia and the ELICOS sector.

The Strategy again makes no mention of the ELICOS sector within this specific strategic action, with no reference to the key roles played by the sector in driving diversity in the nationality mix, opening up markets new to Australia and providing a low cost, low risk opportunity for students who do not have a strong knowledge of Australia and its education system to 'sample' what Australia has to offer before investing in a longer educational experience.

5.1. *Maintaining competitive visas and strong consumer protections*

This strategic action is important for English Australia and the ELICOS sector.

Australia's visa policies (not only Student visas) play a critical role in ensuring Australia's attractiveness and competitiveness, however too many decisions are made in this area with no industry consultation and that do not fully consider the potential impact on the sector. Some recent examples are:

- the introduction of the Subsequent Temporary Application Charge (STAC) from 1 July 2013;
- the removal of resident tax status from working holiday makers from 1 July 2016.

Critical to achieving success in this area will be the ability to coordinate better understanding across government portfolios regarding the impact of policy decisions and whether they align with the government's broader goals for international education and the visitor economy. Currently, the review of the Streamlined Visa Program (SVP) is an internal review within the Department of Immigration and Border Protection, with no confidence that broader issues are being incorporated into the recommendations. If an MCCIE is implemented (as referenced earlier) this will have the potential to militate against these issues.

There needs to be a degree of urgency given to the current review of SVP that reflects the concerns identified by the industry ever since it was implemented and recently articulated in the Productivity Commission report on international education services. If international education is as important to Australia as this Strategy seems to indicate, greater focus should be given to progressing urgent matters such as this.

It should also be noted that English Australia provides additional consumer protection for non-student visa holders studying with its member colleges through a Tuition Assurance Scheme that assures them of a place with another college should their college close. These students are currently not protected by the ESOS framework.

5.3. Improving English language proficiency

This strategic action is important for English Australia and the ELICOS sector.

The Strategy does not articulate this strategic action as well as it could do, not differentiating between the roles of various stakeholders (and quality assurance mechanisms) in ensuring appropriate English language outcomes at various stages of an international student's pathway. Outcomes for stand-alone ELICOS students are different to those desired by pathway ELICOS students. The preparation of students for further study is a core role for many ELICOS providers, but the role of institutions in other sectors of education in ensuring ongoing support for the development of English language proficiency once international students commence further study programs with them is not articulated well, nor is the responsibility for graduate/employability outcomes related to English language proficiency.

5.4. Improving access to public transport and health services

This strategic action is important for English Australia and the ELICOS sector.

Access to public transport concessions is a particular issue for ELICOS students, many of whom are still excluded even in states where international students are treated the same as domestic students, mainly because ELICOS students are not enrolled in formal courses, but generally in non-award courses. The statement in the Strategy that *"Most state and territory governments already provide international students with transport concessions equal to those available to domestic students"* is not an accurate description of the current reality.

5.5. Improving access to suitable and affordable accommodation

This strategic action is important for English Australia and the ELICOS sector.

Much of the work that is being done to improve the accommodation options available for international students has been focused on students in the higher education sector. Whilst there has been significant investment in the development of new student accommodation options in many cities, many of these options are not available to many ELICOS students who are not 'attractive' to accommodation providers as they are only in Australia for short periods of time ('short' compared to university students).

Homestay is one of the most attractive accommodation options for ELICOS students as this option offers opportunities to develop English language skills outside of the classroom as well as providing an authentic 'Australian experience'. There is, however, a significant shortage of families interested in providing homestay. A national campaign to promote the benefits of 'inviting an international student to stay' could have a huge impact in terms of both expanding the number and range of homestay options as well as contributing to the community engagement agenda.

5.6. Increasing community engagement

This strategic action is important for English Australia and the ELICOS sector.

As discussed above, this strategic action takes a narrow view of community engagement, addressing Recommendation C3 of the Chaney report but not the broader goal of ensuring public recognition of the importance, contribution and value of international education to Australia.

English Australia recommends that the Chaney report recommendation to *“Develop and implement a communication campaign to articulate the many economic and cultural benefits that international education and students bring to Australia”* (Recommendation G2) should be re-visited and incorporated in the Strategy.

6.3. Understanding the opportunities

This strategic action is important for English Australia and the ELICOS sector.

English Australia endorses the importance of having high-quality research and analysis on international education to help inform the strategic directions of institutions and governments.

What would you like to see progressed as a priority for the strategy in the first year?

Response:

Make it real. After the significant gap between the release of the Chaney report and the release of the Strategy, the process needs to be reinvigorated and to regain lost momentum:

1. To re-engage the sector, the alignment outlined in this submission needs to be progressed and demonstrated.
2. MCCIE needs to be established and launched.
3. Education providers need to be engaged in practical and meaningful ways, demonstrating what the Strategy actually means for them and how they can contribute to delivering on the measures of success.
4. A Year One ‘theme’ needs to be initiated to engage both core and non-core stakeholders including the urgent implementation of the Chaney report recommendation to articulate the benefits of international education to the broader Australian audience.
5. A clear work-plan needs to be established that articulates how specific goals will be progressed and how the sector will be engaged.

Is there anything else you would like to raise that will help develop the final National Strategy for International Education?

Response:

English Language

English Australia believes that the importance of English language proficiency to the success that international students achieve in their study, their engagement with the Australian community, their employment options and their future careers and social engagement as a truly 'global citizen' is significantly underplayed in the Strategy, as is the contribution made by the ELICOS sector.

Engagement of the Sector

English Australia welcomes the progress that has been made in developing a draft Strategy that will bring together both government and sector stakeholders in the pursuit of a uniting vision.

It will be critical, however, that the sector feels that they too have ongoing ownership of the Strategy and that it is has relevance and meaning to the education providers who are 'at the coalface', delivering programs and supporting international students. If it has no meaning or impact for all sectors of international education then it will fail.

Resourcing and 'Real' Goals

The Strategy does an excellent job of capturing clear areas of focus, however much of the document describes what is already happening rather than identifying new initiatives or strategies that will move the sector forwards.

The rhetoric of the document also has to be matched by real actions and real resourcing, recognising that change will not happen without a true will to make it happen.

Strong alignment

The most optimistic scenario devised by the 47 stakeholders who participated in the English Australia Scenario Planning Day was summarised as:

"The ELICOS sector contributes to and operates within a context of strong alignment across all international education stakeholders supported by a focus on best practice in all aspects of business and academic practice that provides a framework that facilitates a flexible approach to innovate and capitalise on opportunities resulting in strong overall growth across the Australian international education sector."
(Appendix A)

A key element highlighted by the above is the need for a 'strong alignment' of the Strategy with:

- both Austrade's 2025 exercise and the Productivity Commission report on Barriers to Services Exports;
- the yet to be established Ministerial Coordinating Council on International Education; and

- the aspirations of core and non-core stakeholders - both the international education community and the wider Australian community which increasingly has a stake in the future of the sector.

To achieve this 'strong alignment', the Strategy needs to be:

- more visionary;
- more clearly articulated; and
- set within a ten year framework aligned with *AIE 2025* with annual benchmarks.

Appendix A: ELICOS Scenario Planning 2014-2019

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