



# International Education Action Plan



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Growing the numbers of international students studying in South Australia is a priority for the South Australian Government, part of its commitment to the **“Knowledge State”**.

**The Hon Martin Hamilton-Smith**  
Minister for Investment and Trade



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# Foreword from the Minister



International education is one of South Australia's key exports injecting nearly \$1.2 billion into our economy in 2015 and creating thousands of local jobs. Students from around the world go back to their parent nations as friends of Australia. Families and friends visit students and help stimulate the local economy. Linkages form between South Australians and international students. For these reasons, growing the numbers of international students studying in South Australia is a priority for the South Australian Government, part of its commitment to the "Knowledge State".

Earlier this year Cabinet allocated responsibility for growing the number of international students in South Australia to the Minister for Investment and Trade. This recognised the economic importance to the South Australian economy of international students. Subsequent to this decision the Commonwealth Government issued its National Strategy for International Education 2025 which predicted significant increases of international students studying onshore in Australia.

The Commonwealth strategy was informed by Deloitte Access Economics in the Growth and Opportunity in Australian International Education report. This report estimated that by 2025 the world will have over one billion students seeking education and skills, and that the Australian onshore international education sector is capable of increasing from approximately 647,000 today to 940,000 by 2025.

I commissioned a report by Deloitte Access Economics to measure the opportunity before us. This report found that in 2015, 32,100 onshore international students enrolled in South Australia spent nearly \$1.2 billion on education fees and other goods and services, including accommodation, groceries, and other food and beverages. Deloitte identified that 28,800 visitor nights and \$6 million in export revenue from the visiting friends and relatives of international students could be attributed to the international education sector.

The consultation process is now complete and responses have been incorporated into this Action Plan. Stakeholders want the Government to work closely with all parts of the industry in the planning and implementation of the initiatives identified.

South Australia's economic future, local jobs and enterprise, together with our sense of place in the world, are all influenced by our performance in attracting and supporting international students. If South Australia is to remain internationally engaged, we need to grow international student enrolments and optimise the opportunity for economic and population growth this industry offers. This Action Plan sets out a pathway to achieve these goals. I look forward to working with all stakeholders to deliver these positive outcomes in the years ahead.

**The Hon Martin Hamilton-Smith**  
Minister for Investment and Trade

# Background

## **General**

Adelaide is an education city with four local universities, complemented by University College London and Carnegie Mellon University. Within South Australia there are 522 government high schools and primary schools and 197 private schools, many of which offer places to international students. South Australia has a vibrant Vocational Education and Training (VET) sector comprising the publicly funded Technical and Further Education (TAFE SA) which has 46 education sites, and 224 private VET providers delivering diverse subject offerings. This skill base and infrastructure sustains a vibrant city within a vibrant State. Education accounts for 20% of State Government budget outlays; education comprises 2.5% of Australian Gross Domestic Product (GDP) and 2.8 % of South Australian Gross State Product (GSP).

## **Education exports**

International education has become the State's fifth largest export, reaching nearly \$1.2 billion in 2015 (Australian Bureau of Statistics Catalogue 5368.0). This is the highest ever export value for international education and represents significant growth from the \$1.056 billion in 2014. Of the total export value, 48% is spent on fees to education institutions and 52% on living costs leading to jobs in a range of service and retail industries. It has been estimated the international education and training sector (including onshore international students in South Australia and their visiting friends and relatives) contributed \$954m to the state economy in 2015 as measured by total value added (contribution to GSP), and sustained a workforce of 7,536 full time equivalent jobs. This represents 1.0% of the GSP and 1.1% of the State's workforce.

## **Economic impact**

South Australia's share of the national economy is 6.1% (Australian Bureau of Statistics Catalogue 5220.0). South Australia's population share of the national total is 7.1% (Australian Bureau of Statistics catalogue 3218.0). South Australia's share of the international student market in Australia is 5.15% (Austrade – International Student Data, published May 2016). The South Australian Government's Economic Priority 4, the 'Knowledge State', includes the objective of increasing the number of international students studying in South Australia from 28,300 in 2013 (baseline) to 35,500 by the end of 2017. Based on 2015 enrolments, this equates to approximately 5% of the Australian onshore international education market. If South Australia had a market share consistent with its share of the Australian population, this would equate to approximately 45,640 students in 2015.

## **Future growth**

In the "International Education in South Australia" report, published July 2016, Deloitte Access Economics estimated that under a baseline scenario, onshore international student enrolments in South Australia will grow from 34,500 in 2016 to 48,000 in 2026. This represents 5.1% of the projected Australian onshore international education market in 2026 and a compound annual growth rate of 3.4%. If South Australia's share of the onshore international student market grew to a level consistent with its share of the population by 2026 (projected to be 6.7%), that would equate to 63,200 enrolments and require a compound annual growth rate of 6.2%. If South Australia's share of the onshore international market were to grow further and reach 10% market share by 2026, that would equate to 93,700 enrolments and require a compound annual growth rate of 10.5%.

# Aim of this action plan

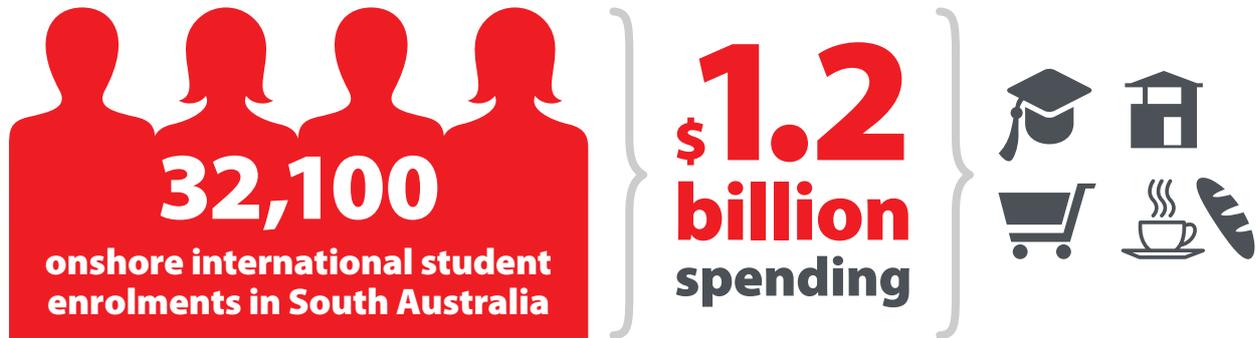


**The aim of this Action Plan is to ensure South Australia increases the number of international students studying in South Australia from 28,300 in 2013 (baseline) to 35,500 by the end of 2017.**

A further aim of the plan is to achieve a share of the total number of international students which is equal to South Australia's share of GDP as a first step, and as a second step which is equal to South Australia's share of population, as soon as practicable. It is recognised that this target is challenging and needs to be subject to significant consultation with specific industry sectors.



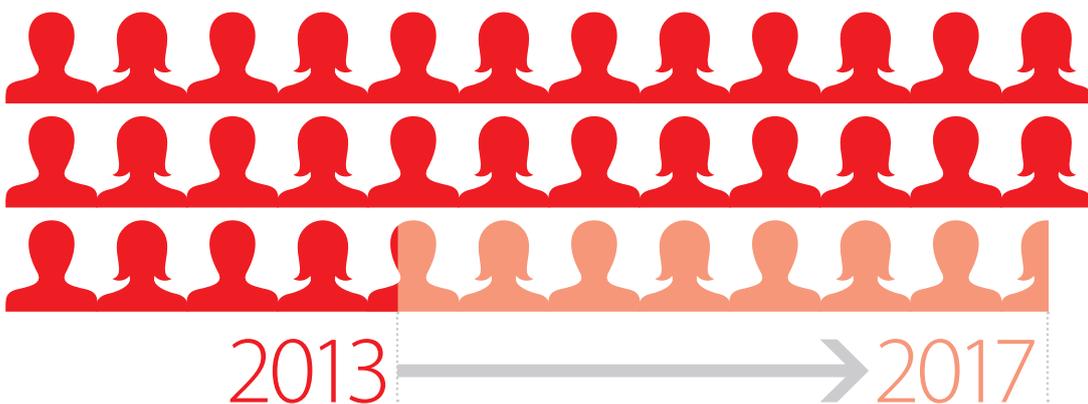
A report by Deloitte Access Economics found that in **2015, 32,100 onshore international student enrolments in South Australia spent nearly \$1.2 billion on education fees, and other goods and services**, including accommodation, groceries, and other food and beverages.



# Action Plan

1. Reinforce Destination Adelaide
2. Create an International Education Ministerial Advisory Council
3. Create an International Education Office
4. Implement country market development plans
5. Apply sector development plans
6. Provide an Accommodation Offer Guarantee
7. Establish an Export Internship Program
8. Create a business development function
9. Provide offshore representation in international markets
10. Use country visits and missions to develop markets/increase student numbers

The aim of this Action Plan is to ensure **South Australia increases the number of international students** studying in South Australia **from 28,300 in 2013 (baseline) to 35,500 by the end of 2017.**



# Execution



## **General outline**

New governance and advisory structures are to be established. A range of actions outlined in this plan will support the university, government and private education sectors to meet the 35,500 student target by the end of 2017. Existing resources across government will be reorganised under the Department of State Development (DSD) to form a new International Education Office which will focus on business development across sectors. International Education Exports will be coordinated with SA's International Engagement Strategy and Trade Missions program. New support arrangements will be put in place with regard to budget, accommodation guarantees, visa management, business internships and other measures to support institutions and students. The full economic benefit of this industry will be better harnessed and monitored. These objects will be achieved by 10 distinct actions.

## **Action 1: Reinforce Destination Adelaide**

The Government's key policy position, the Destination Adelaide plan, is the State's blueprint for attracting international students to Adelaide as well as supporting those in the research and education fields to engage profitably in South Australia's priority international markets. Destination Adelaide supports education and training providers' institutional - based strategies. This plan was developed cooperatively with the sector and has four strategic goals:

- Growing SA's International Education Footprint
- Enhancing the Student Experience
- Supporting the International Student Sector
- Promoting Adelaide – Australia's Premier Learning City

The State Budget provided additional funding comprising \$5.7 million over four years for Destination Adelaide (2015–16 Budget Paper Number 1, Budget Overview Page 8).

This Action Plan reinforces Destination Adelaide. Activities currently underway through Destination Adelaide will continue, with the industry given more opportunity to consider other initiatives and joint activities that will lead to growth in their specific sector of the market. Progress will be overseen by the proposed International Education Ministerial Advisory Council.

Progress has been made on a number of the initiatives including:

- Accommodation Offer Guarantee
- Knowledge Exchange (including internships)
- Student placements
- International education market analysis
- Trade missions
- Overseas offices
- International student visas
- South Australia Sister State agreements
- Research
- Office of the Training Advocate (international student services)

Significantly increasing the numbers of international students will require close collaboration between the Government and the international student industry.

## Action 2: Create an International Education Ministerial Advisory Council

A Ministerial Advisory Council (MAC) is to be formed to receive education provider feedback and drive policy and cooperative programs to increase the South Australian share of the international student market. The MAC will complement the work of the Premier's Higher Education Committee with university Vice-Chancellors. The MAC will meet four times a year and the following organisations will be invited to join:

- Catholic Education South Australia
- Australian Council for Private Education and Training (ACPET)
- Department for Education and Child Development
- English Australia
- Flinders University
- International student representative
- Office of the Training Advocate
- SA Certificate of Education (SACE) Board
- Torrens University Australia
- UCL Australia
- Carnegie Mellon University
- SA Student Accommodation Association
- StudyAdelaide
- University of South Australia
- University of Adelaide
- Association of Independent Schools of SA (AISSA)
- TAFE SA
- Other bodies identified by the Minister
- Selected non-education providers in key roles

The MAC will include non-education providers who play a key role in the industry such as the Office of the Training Advocate (OTA), a representative of purpose built student accommodation (SA Student Accommodation Association) and a student representative to come from either the Council for International Students Australia (CISA) or one of StudyAdelaide's Student Ambassadors. A draft Terms of Reference for the MAC will be discussed at the first meeting. The MAC will focus on new opportunities to increase international student numbers whilst understanding the individual providers' commercial interests.

The MAC will advise the Minister on policy and international developments to increase market share from present levels to as a first step SA's share of national GDP, as a second step SA's share of population including:

- Accommodation
- Coordinated offshore marketing
- Improved international student services
- Joint programs
- Pathway improvements
- Specific country strategies
- Trade missions
- Work integrated learning
- Cooperative promotions
- Entering emerging markets
- Joint marketing activities
- Offshore offices
- Removing state barriers to market expansion
- Student placements
- Visa issues with Commonwealth
- Whole of state strategies

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## Action 3: Create an International Education Office

A South Australian International Education Office (IEO) will be established to ensure that South Australia meets the 35,500 target set for the end of 2017. The IEO will consult with the MAC, universities and education providers to develop a roadmap to increase South Australia's market share to the State's percentage of GDP as a first step and to the State's percentage of population as a second step, as soon as is practicable.

The IEO will coordinate the range of public bodies involved in international education and maximise efficiency within limited state resources. This will involve the Department of State Development, Department for Education and Child Development, TAFE SA and StudyAdelaide.

Under this Action Plan, South Australian government agencies will be required to work more closely together with a business development focus designed to grow student numbers. Cooperation and interaction with the university sector and the private education sector including VET and schools will be improved.

Actions will concentrate on growing student numbers with individual agencies retaining responsibility for the quality of the education product and for certain administrative functions relating to students.

The South Australia IEO will coordinate whole of government activities to work with education providers in relation to:

- **Cooperation:** identifying opportunities for cooperation in relation to international student recruitment and promotions
- **Information:** sharing market information in relation to international and national competition and competitors' approaches, product development and major promotion and recruitment activities
- **Issues:** identifying major emerging issues that the South Australian Government will need to understand and act upon
- **Opportunities:** identifying wider opportunities for cooperation in international student recruitment and product development that can be referred to the Minister and Government
- **Policy development:** identifying key policy issues, both state and Commonwealth, that require consideration by government including whole of state strategies including visas, SSVF, AEI 2026 etc.

The IEO will be co-located within the Department of State Development. Appropriate officers from the agencies making up the office will be seconded to the IEO to work on key opportunities. Non-government international education sectors will also be encouraged to co-locate officers in the IEO to work on key programs such as student placements, accommodation and specific international education trade missions.

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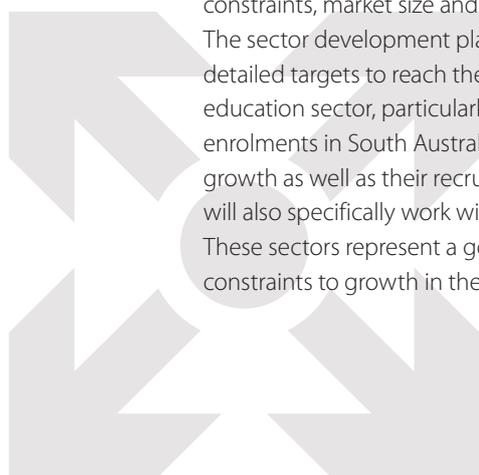
## Action 4: Implement country market development plans

International education exports will be informed by the government's international engagement strategies and regional strategies. The program of inbound and outbound trade missions will be harnessed to further grow international student numbers. There are a number of close geographic markets that South Australia underperforms in terms of Australian market share. These include the Philippines, India, Thailand, and Indonesia. This does not indicate that South Australia should take market share from other states but indicates geographic areas that may require more attention by South Australia's international education providers. Consultations indicated that a focus on specific country and regional markets is important. A series of country market development plans will be developed with the industry and Austrade. Provider commercial-in-confidence information will be recognised in relation to the plans. StudyAdelaide's destination marketing activity is informed by its members, and country plans will need to align with their recruitment strategies. Close coordination at the IEO will assist in achieving this.

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## Action 5: Apply sector development plans

Where required by the industry the IEO will work with specific sectors to identify barriers to growth, capacity constraints, market size and trends and future growth plans that can be achieved without lowering standards. The sector development planning will also include the development of targets for each of the sectors. The detailed targets to reach the aspirational growth target will be set in full consultation with the international education sector, particularly the South Australian universities given that 51% of all international student enrolments in South Australia were in higher education in 2015. Factors such as the institutions' capacity for growth as well as their recruitment strategies should be taken into consideration. The sector development plans will also specifically work with the private sector, higher education, schools and vocational education providers. These sectors represent a good opportunity for growth and the Government will need to understand the constraints to growth in these sectors and support where possible.



## **Action 6:** Provide an Accommodation Offer Guarantee

The IEO will deliver the South Australian Government's policy of an Accommodation Offer Guarantee to students. This will include an analysis of the supply and demand of purpose built student accommodation, a quality framework, and the delivery of more information to students. The IEO will work with the student accommodation sector on a range of issues including monitoring the supply/demand of purpose built accommodation, an industry self-accreditation system and a student accommodation tenancy document.

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## **Action 7:** Establish an Export Internships Program

This program is designed to place international students in a SA export-ready business with a pilot for Chinese students commencing in June 2015. This program has strong support from the Premier's Higher Education Committee and is being implemented via a joint Government-education provider approach.

The IEO will create a website to enable South Australian businesses to link directly with universities to place international students in work experience, internships and graduate programs. The site will also highlight the benefits of employing an international student and explain the working of 485 visas. The website will be cross-promoted to businesses engaging with DSD via the trade missions as well as those businesses interacting through Tradestart and the Export Partnership Program.

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## **Action 8:** Create a business development function

The IEO will increase its business development function with the appointment of a Business Development Manager and two Business Development Officers.

The business development function within the IEO will seek to significantly increase student recruitment.

The Business Development Officers, drawn from existing State Government agencies, will work with key education sectors including VET, ELICOS/Non Award and Schools.

Public universities and private providers will have the option of participating and co-locating.

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## **Action 9:** Provide offshore representation in international markets

The South Australian Government will have dedicated officers embedded in Austrade offices who will be used to provide offshore representation for the South Australia international students sector. Officers will be trained to better understand the range of providers operating in South Australia and provide them with in-country support and assistance. South Australian government presently provides office representation in China (Jinan, Shanghai, Hong Kong), India (Mumbai) and the United Kingdom (London). New offices will be established in Thailand (Bangkok), Indonesia (Jakarta), Malaysia (Kuala Lumpur) and Singapore. Government also has access to the infrastructure of Scope Global which includes access to additional countries such as Cambodia, Laos, Mongolia, Nepal, Sri Lanka, Vietnam and a range of Pacific Island countries.

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## **Action 10:** Use country visits and missions to develop markets/increase student numbers

The IEO will provide coordination of in-country missions being planned and undertaken including specific region target countries, dates in-country, visits to institutions and Ministerial functions. The destination marketing activities for StudyAdelaide will be coordinated. Associated promotional collateral will be developed and extended including the South Australia Research Prospectus and the South Australia Education Prospectus.

# Coordination



**This Action Plan has immediate effect. Meetings of the MAC will be held quarterly to identify new growth opportunities. The IEO will have carriage of these initiatives and work with key partners to achieve whole of state goals. The Action Plan provides the mechanisms to work with the international education sector to identify new program opportunities. When agreement on the initiatives and priorities have been clearly developed an implementation plan with key dates and outcomes will be developed and agreed and integrated with the Destination Adelaide initiatives. The role of DSD and other agencies is to use government resources to provide people and support, and consider future budget reallocations.**

The IEO will connect with the university, VET, schools and ELICOS sectors and will respect the role of each organisation within the sectors in administering their own affairs. DSD's function is to support, coordinate and to encourage growth. Where obstacles to growth are identified, DSD will support education providers to overcome them. DSD will ensure that there is cooperation between private sector and public sector education providers and will support both sectors equally. A Team South Australia approach to international education will be encouraged.

Performance will be reported through the budget process and through the production of an Annual Statement on International Education Economic Impacts at the end of each calendar year.

# Administration



**Government resources across this function are extensive. This Action Plan brings together agencies in key sectors into a single IEO by redistributing existing resources. Where practicable people and funds will be reorganised to achieve outcomes. The various arms of government, the university sector and private education, VET providers and schools will be encouraged to work together.**

DSD will coordinate budget bids to promote international students and will report on progress in the context of the government's economic priorities. The Executive Director of International Engagement, Trade, Immigration and Higher Education will report through the Chief Executive of DSD to the Minister.

Further details regarding student numbers, the international students industry in South Australia, a proposed Charter for the MAC, an organisational chart for the IEO and other relevant information is included in the Appendices.

# Conclusion



**Through better collaboration and cooperation between the key organisations involved in international education, South Australia can make greater use of its resources and strengthen its position as a destination of choice for international students.**

The establishment of an IEO and a MAC will provide the leadership and consultation mechanisms required to maximise our opportunities. By working together, we can overcome many of the challenges and constraints to growing our market share of international students.

The Action Plan will be reviewed after 12 months, with an Annual Statement on International Education to be produced. South Australia is well placed to maximise the opportunities from the projected world-wide growth in international students. This Action Plan provides the way towards achieving the high aspirational target.



# Appendices



- A** Student numbers in South Australia
- B** The international students industry in South Australia
- C** International Education Ministerial Advisory Council
- D** Proposed International Education Office organisation chart
- E** Potential initiatives: domestic and international opportunities

## Appendix A

### Student numbers in South Australia

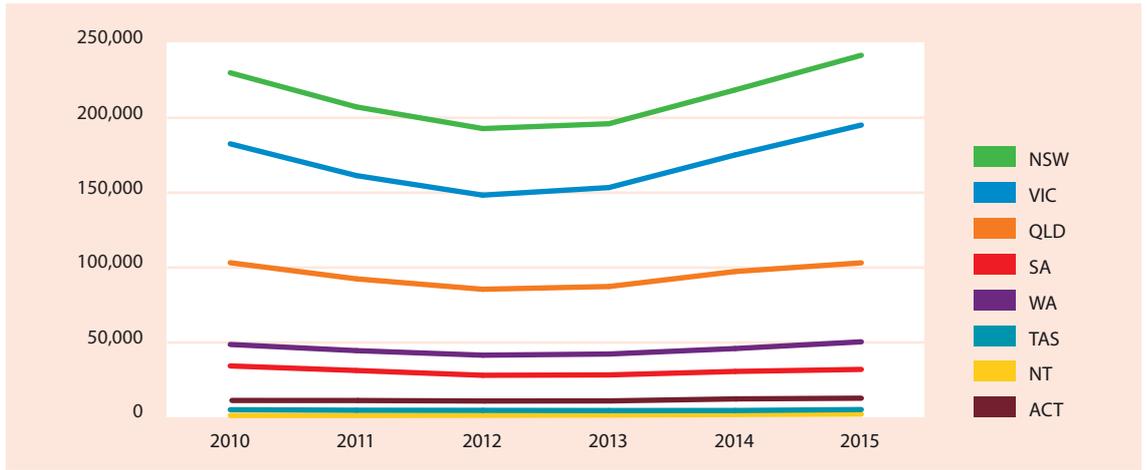
South Australia could do better in terms of market share for international students. SA's market share should be between 7.2% (population share) and 6.1% (Gross State Product share). The latest year to date (December 2015) aggregate figure across all sectors indicates a share well below this figure.

#### South Australian enrolments by sector - 2015

Sector	Enrolments	% share of Australia
Higher Education	16,254	6%
VET	4,790	3%
Schools	2,129	10%
ELICOS	6,034	4%
Non-award	2,809	8%
<b>TOTAL</b>	<b>32,016</b>	<b>5%</b>

Source: The Australian Trade and Investment Commission (Austrade) – International Student Data, published May 2016.

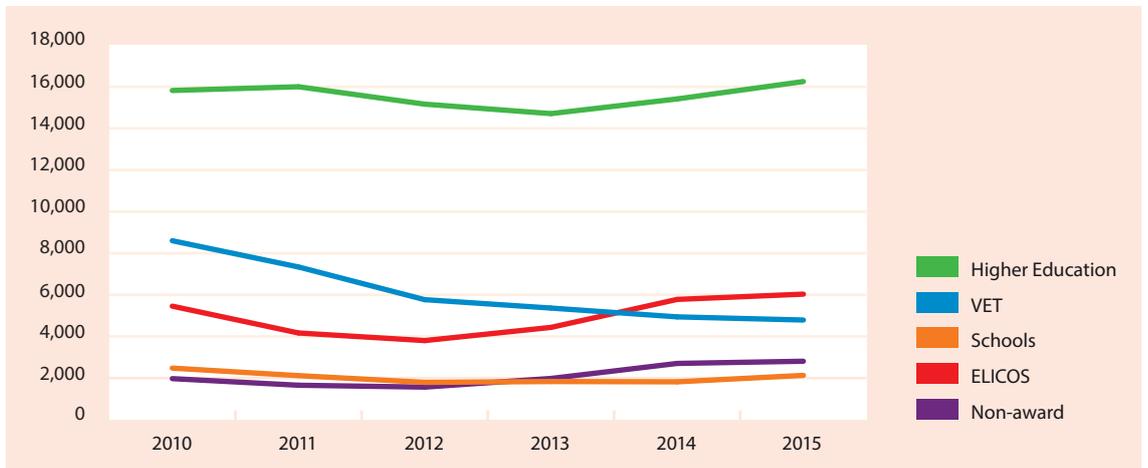
**Growth in number of international students (all sectors) YTD December 2010-2015**



The Australian Trade and Investment Commission (Austrade) – International Student Data, published May 2016.

Over the last 5 years the overall Australian international student market has grown by 4.25%. However, the number of international students across all sectors studying in South Australia has decreased by 2,315 over this period, equating to a decrease of 6.74%. As a result, SA's market share has decreased from 5.57% in 2010 to 4.98% in 2015. Over the same period, increased market shares for ACT, NSW, NT, and Victoria have been broadly offset by falls for other Jurisdictions (QLD, SA, WA, and Tasmania). If South Australia had maintained its share of the international education market over this period, approximately an additional 3,789 students would be studying in South Australia.

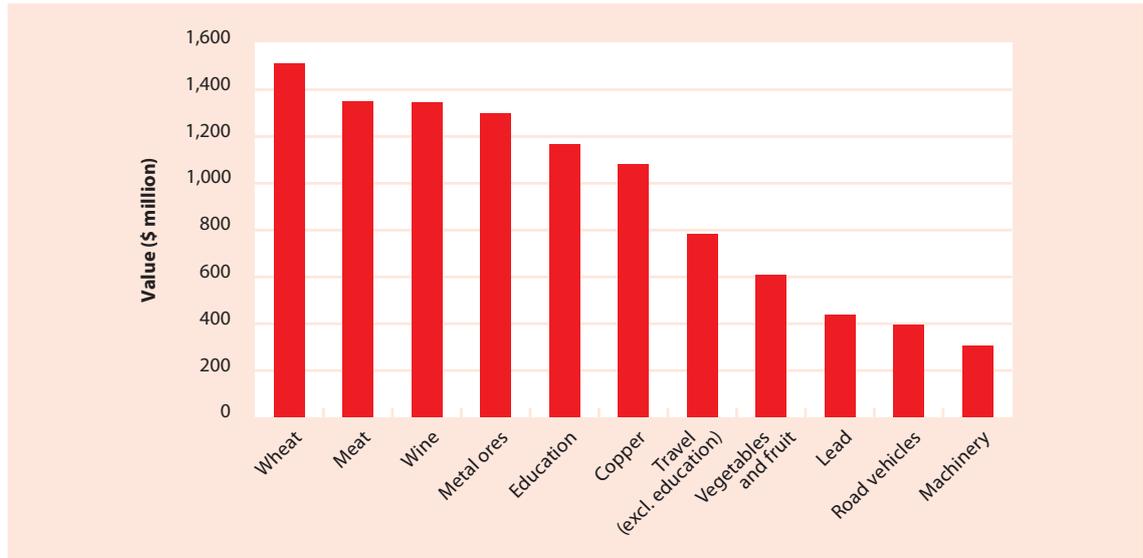
**Growth in number of international students by sector, South Australia only YTD December 2010-2015**



Source: The Australian Trade and Investment Commission (Austrade) – International Student Data, Published May 2016.

In South Australia the higher education sector has outperformed other sectors in sheer numbers with an overall growth rate of 2.72% since 2010, while the VET and school sectors have declined by -44.31% and -16.39% respectively with the ELICOS and non-award sectors increasing by 10.59% and 42.44%. Since 2013 the higher education sector has shown an upward trend with this also occurring in ELICOS and non-award in 2014.

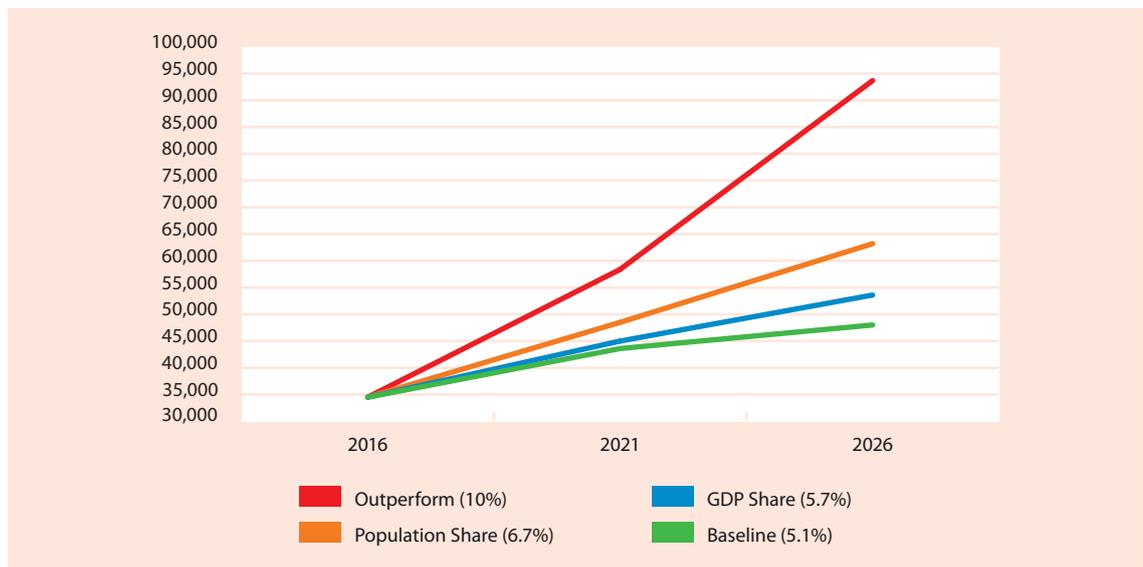
### Selected South Australian exports, 2015



Source: Australian Bureau of Statistics catalogue 5368.0.

The value of South Australia’s international education exports continued to grow from \$1.056 billion in the 2014 calendar year to a new high of \$1.166 billion in the 2015 calendar year. This represents a 10.42 percent increase and makes education South Australia’s fifth largest export after wheat, meat, wine and metal ores.

### South Australia’s international student enrolments 2016-2026



Source: Deloitte Access Economics, International Education in South Australia, July 2016 Australian Bureau of Statistics, Catalogue 5220.0

The graph above describes a number of potential scenarios for future growth in South Australia’s international student enrolments. Under the baseline scenario modelled by Deloitte Access Economics, international student enrolments would increase to 48,000 in 2026. In a scenario where South Australia’s share of Gross Domestic Product is projected to decline to 5.7%, and the number of international students increased to a level commensurate with that share, the number of international students would increase to 53,600 by 2026. If international student enrolments increased in line with South Australia’s projected share of Australia’s population, that would equate to 63,200 international students. If South Australia outperformed the other states and territories and achieved 10% of projected Australian international student enrolments, that would equate to 93,700 students. These figures are only indicative.

# Appendix B

## The international students industry in South Australia

A wide range of public and private organisations are active in international student activities, recruitment and management. These organisations are independent entities with specific charters and commercial interests and objectives. It is not the role of Government to interfere with their decisions in relation to their marketing and international plans, but collaboration and cooperation are vital. This approach implicitly recognises that the strongest competition comes from outside South Australia, particularly international competition.

The key organisations active internationally include:

### ***English Language Intensive Courses for Overseas Students (ELICOS) providers***

Adelaide has a range of providers that offer full-time English Language courses (both beginner and advanced) running from four to 52 weeks.

English Language Intensive Courses for Overseas Students (ELICOS) are especially popular, not least among students seeking to further their studies in Adelaide. Some ELICOS courses are tailored to focus on specific fields such as tourism, IT and business.

### ***Private higher education providers***

In addition to South Australia's public universities there are a range of high quality private higher education CRICOS registered institutions based in or operating from South Australia in the international market including:

- Australian Catholic University
- Australian Institute of Business
- Central Queensland University
- Chifley Business School
- Educational Enterprises Australia
- Federation University Australia
- International College of Hotel Management
- Kaplan Business School
- Le Cordon Bleu Australia
- South Australian Institute of Business and Technology
- Study Group Australia
- Tabor College

### ***Private vocational education and training providers***

There are 34 private vocational education and training providers currently registered to provide vocational education to international students accounting for approximately 75% of SA international VET students. These specialist providers are active across a range of fields of education and have pathway programs with a range of universities.

The peak body for these providers is the Australian Council for Private Education and Training (ACPET).

## **Schools**

South Australian government schools provide exciting study abroad experiences for international primary and high school students from all over the world. Options are available at both metropolitan schools in Adelaide or in one of the many South Australian regional schools. These schools are committed to providing superior care and support, including a comprehensive orientation program, homestay accommodation services, subject counselling, ongoing English language support and 24 hour emergency contact.

A range of independent and faith based schools are also active in the international students' area. These schools have an outstanding reputation, and an excellent history of providing high quality educational opportunities to international students.

## **TAFE SA**

TAFE SA is the largest vocational provider in South Australia and home to international students from more than 70 different countries. Offering more than 50 university pathway programs and 150 credit pathways to university, many courses offer work placements for real life professional experience.

Practical intensive learning is the heart of what TAFE SA teaches. Work placements help students gain real life experience while studying. Putting new skills into practice in a professional environment, gaining new skills and real experience as well as developing valuable industry contacts are all key outcomes of work placements.

## **Universities**

The State's three public universities and one private university are all internationally recognised competitive institutions.

Established in 1874, the University of Adelaide is Australia's third oldest university, and the oldest university in South Australia. The university has an international reputation for academic and research excellence. Consistently ranked in the top 1% of universities globally; it delivers graduates that make a difference in their local and global communities.

Flinders University has a multicultural and diverse community of students from over 90 countries. The university has built a strong reputation for innovation and teaching excellence, with industry driven programs. Ranked in the top 2% of universities worldwide, Flinders earned a top 300 placement in the Times Higher Education World University Rankings 2015-16 and was ranked 6 in Australia and 46 worldwide in the Times Higher Education Top 150 under 50 year old university rankings.

The University of South Australia is Australia's university of enterprise with teaching that is industry informed and research that is progressive. The university's strong industry links and global engagement ensures students gain the experience and expertise required to make an impact in their career. With more than 33,000 students including 6,000 international students, this university is South Australia's largest.

Torrens University Australia (TUA) is a private university with its head office in Adelaide and locations in Sydney, Melbourne and Brisbane. Torrens University is part of Laureate International Universities, a leading international network of quality, innovative institutions of higher education, comprised of 80 universities across 29 countries. TUA's association with Laureate International Universities provides the opportunity to leverage the network of over 1,000,000 students around the world – including more than 100,000 online students.

Carnegie Mellon University (CMU) is a private, global research university. Carnegie Mellon stands among the world's most renowned educational institutions. The Australian Campus of Carnegie Mellon University offers the unique experience of earning an American degree whilst living in Adelaide.

All courses offered at CMU Australia are post graduate with a focus on Information Technology, Public Policy and Management.

UCL Australia is an international campus of the University College London, one of the foremost academic institutions in the world. It currently ranks fourth in the QS World University Rankings 2014, with no fewer than 29 Nobel Prize winners. UCL Australia is UCL's first overseas campus and the first British university to establish a campus in Australia. All courses offered at UCL Australia are post graduate and are focussed on Energy and Resources Management.

### **StudyAdelaide**

StudyAdelaide is a public corporation owned by the South Australian Government. The Corporation has its own Board and Charter and develops its destination marketing activities cooperatively with its members.

StudyAdelaide was co-funded by its members and the South Australian Government. StudyAdelaide currently receives 60% (\$2million) of its funding from Government via DSD as well as contributions from DECD and TAFE SA, with the remaining 40% predominately made up of membership, sponsorship and grant funding. There are approximately 40 members of StudyAdelaide across membership levels, including private schools, VET providers and the private universities. The key funding partners are the three public universities and Adelaide City Council who will collectively contribute \$1.22m in 2016/17.

StudyAdelaide promotes Adelaide as an international study destination with two clear mandates – destination marketing and student engagement - both supporting the recruitment activities of South Australia's education institutions. This includes activities such as digital marketing campaigns in key international markets and dedicated events for onshore students.

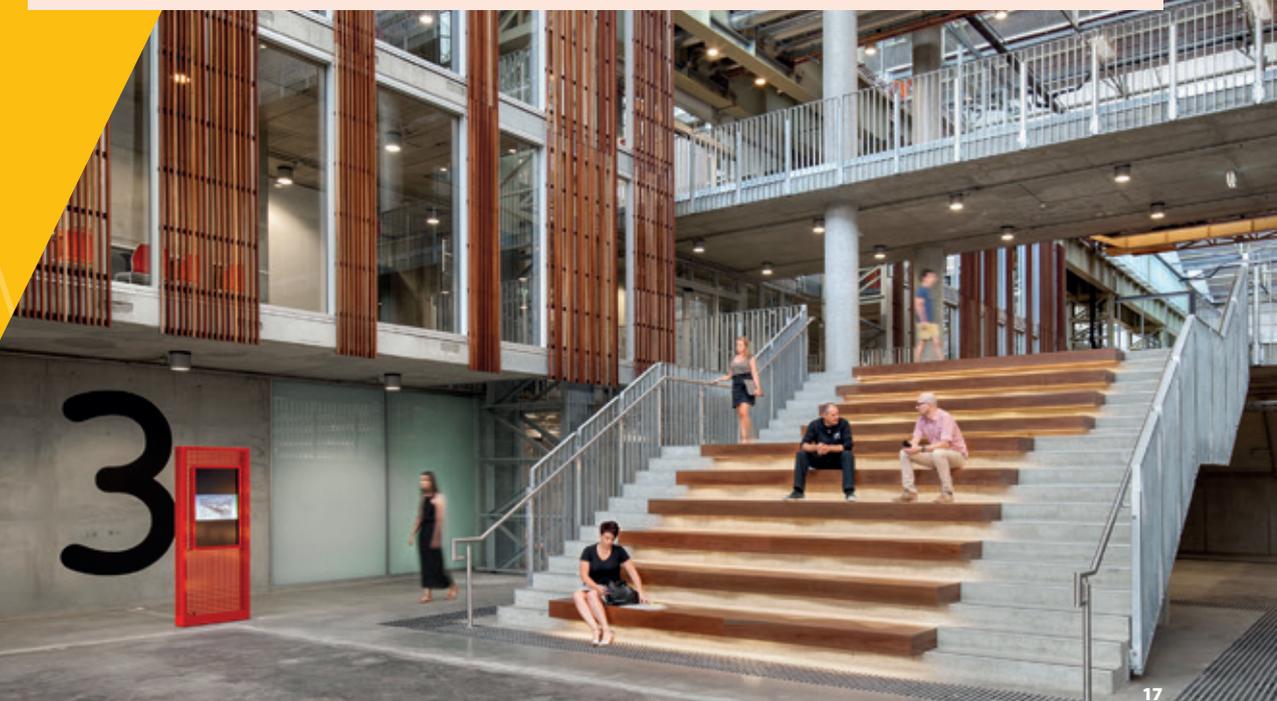
### **Department of State Development (DSD)**

The South Australian Government's role in international education includes providing financial support for destination marketing activities, ensuring that a policy environment is created in which all education sectors thrive and grow their international student numbers, and where international students can have a positive student experience. Increasingly, the Government is considering new initiatives that are not within the role of StudyAdelaide in order to support the growth of international students including accommodation and student placements as outlined in Destination Adelaide.

DSD provides co-ordination across government to deliver programs and policies that support student achievement and mobility in higher education, and the global exchange of knowledge. DSD supports the SA Government's Economic Priorities 4 and 9 and the Premier's Higher Education Committee (PHEC). The PHEC has identified a number of key issues such as affordable student accommodation, internships and placements.



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# Appendix C

## International Education Ministerial Advisory Council

### Terms of reference

The International Education Ministerial Advisory Council will:

- Foster collaboration between Government and the international student sector to increase the number of international students in South Australia and provide pathways for students moving between the school, ELICOS, VET and university sectors.
- Provide a forum for advice to Government on international education policy issues including, where appropriate, developing state-wide responses to national issues.
- Develop innovative domestic and international initiatives to increase South Australia's share of the international student market. This may involve the initiation of collaborative project working parties that will report back to the Council.
- Provide a platform for implementing domestic and international projects to achieve the aspirations set out in the International Education Action Plan.

### Guiding principles

Members of the International Education Ministerial Advisory Council will work together:

- Respecting that the State's education providers are independent organisations with full powers to determine and conduct their own affairs.
- Respecting the Government's role in supporting the education and training sectors to assist in the transition of the South Australian economy and key industries.
- Recognising that the involved parties and the State Government have areas of mutual interest in supporting both their individual growth and performance and that of the State as a whole.

## **Communication**

Members will agree that all media or public communications made in the name of (or referring to) the business of the International Education Ministerial Advisory Council will be made through the Chair of the Council.

## **Membership**

The following members will be invited to join the Council:

- Minister for Investment and Trade (responsible for International Education) (Chair) and representatives from;
- University of Adelaide (optional)
- Flinders University (optional)
- University of South Australia (optional)
- UCL Australia
- Carnegie Mellon University
- Torrens University Australia
- TAFE SA
- StudyAdelaide
- Catholic Education SA (CESA)
- Australian Council for Private Education and Training (ACPET)
- SACE Board
- English Australia
- Council of Private Higher Education (COPHE)
- Association of Independent Schools of South Australia (AISSA)
- Office of the Training Advocate
- South Australian Student Accommodation Association
- Council for International Students Australia (CISA) or one of Study Adelaide's Student Ambassadors
- Deputy Chief Executive, Department for Education and Child Development (DECD)
- Executive Director, International Engagement, Trade, Immigration and Higher Education, Department of State Development
- Director, International and Higher Education, Department of State Development
- Executive Officer, International and Higher Education, Department of State Development

Other members may be appointed at the discretion of the Chair.

Observers to the meetings will be allowed with permission of the Chair.

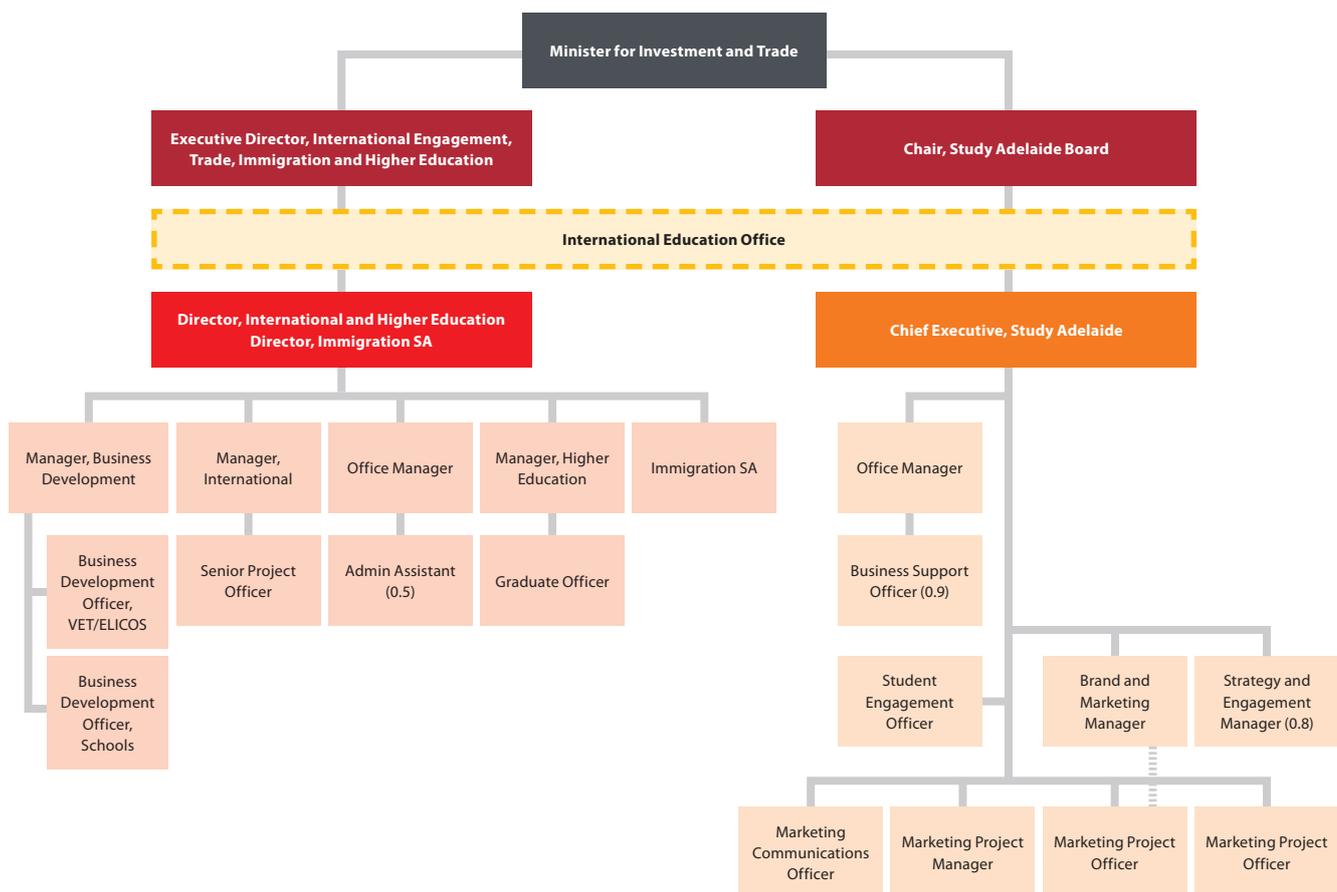
Other members and senior officers from other portfolios will be invited by the Chair to participate for relevant agenda items.

## **Administrative support and meeting logistics**

- Secretariat support for the Council will be provided by the Department of State Development.
- It is the responsibility of the Secretariat to collate updated information on the agreed priority projects and raise any other matters of joint interest to the Council.
- Meetings to be held four times each year and will be set annually.
- A draft agenda and papers will be distributed one week before the meeting.
- Draft versions of the Council's decisions will be circulated to Council membership in note form within two weeks of each meeting.

# Appendix D

## Proposed International Education Office organisation chart



The IEO will draw upon business development function expertise.

The Business Development Manager will:

- Work collaboratively with the sector to develop sector specific plans and targets including opportunities for new market segments, products and countries
- Organise business mission support
- Work with Austrade and South Australia Offices to identify international partners
- Identify and minimise administrative barriers to business growth
- Support new and emerging South Australia education providers to enter international markets
- Provide linkages and referrals to the network of support services available particularly the SA Government's Export Partnership Program and the Commonwealth Export Market Development Grants
- Encourage and support collaborative promotion and marketing projects between sector education providers.

Two Business Development Officers will be drawn from related agencies involved in international student recruitment using existing resources. These positions will require specific sector knowledge and will provide support to key education sectors (Universities, VET, ELICOS/Non Award and Schools) to significantly increase their student recruitment. Some sectors, particularly VET, will need significant support.

# Appendix E

## Potential initiatives: domestic and international opportunities

There are a range of potential initiatives that could be undertaken in order to support growth in the international student market in South Australia.

These initiatives would be developed and implemented cooperatively with the industry with joint investments of time and money, where appropriate. Initiatives will be managed cooperatively with government agencies, StudyAdelaide and educational providers.

The consultation process identified a number of other potential initiatives that could be considered and these have been included below.

### ***Domestic opportunities***

A range of options exists to make the “non-educational” components of the educational experience more marketable and differentiated. These include:

- Accommodation supply – increasing the supply of appropriate student accommodation including purpose built student accommodation (PBSA) and home stay opportunities
- Accommodation Offer Guarantee – integrating the accommodation offer to the admissions system so that commencing students receive an accommodation offer at the same time as their admission offer
- Alumni – improved promotion of international student alumni to SA businesses that are active internationally and could provide employment
- Employment – determine opportunities for promoting part-time employment opportunities for international students currently studying and promote the Temporary Graduate Visa (subclass 485) to ensure that students can access post-graduate employment opportunities
- Exporters grants – improve educational providers access to exporter grants and other government support
- Familiarisation tours – determine opportunities to significantly increase parent, agent, school counsellor and key decision makers familiarisation tours (famils) of SA institutions
- Immigration SA – clearly articulate migration opportunities and promote the newly developed high Grade Point Average (GPA) visa category for SA students
- Improved International Student Services – establish a new International Student Hub in the CBD to deliver a comprehensive range of services and information to international students
- New providers – attract new education providers to set up operations in SA that will not directly compete with existing offerings and will provide access to new markets/educational products
- Product development – work with education providers and key government agencies responsible for the SA Government’s Economic Priorities to identify future state workforce and skill needs. Then work with providers to develop new and enhanced educational products to meet future workforce needs and immigration options
- Student placements – work with relevant State agencies to improve placement opportunities to support growth in student numbers
- Tourism – work with SA Tourism to offer complementary student/parent promotions of South Australia and develop collaborative promotions. Develop new products with a tourism feel (taster programs) that will lead to longer term students
- Visas – lobby the Commonwealth government to ensure Simplified Student Visa Processing rules do not disadvantage SA providers and more closely link the marketing efforts of education providers and Immigration SA including the high GPA visa opportunity available via Immigration SA

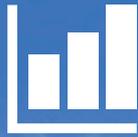
- Visas – lobby the Commonwealth government to review changes to the eligibility for international students to apply for skilled visas and to make it easier for international students to stay and work in SA after completing their qualifications particularly in areas with skills shortages
- Work integrated learning – support a work integrated learning internship program for international students with relevant SA businesses and government bodies.

### **International opportunities**

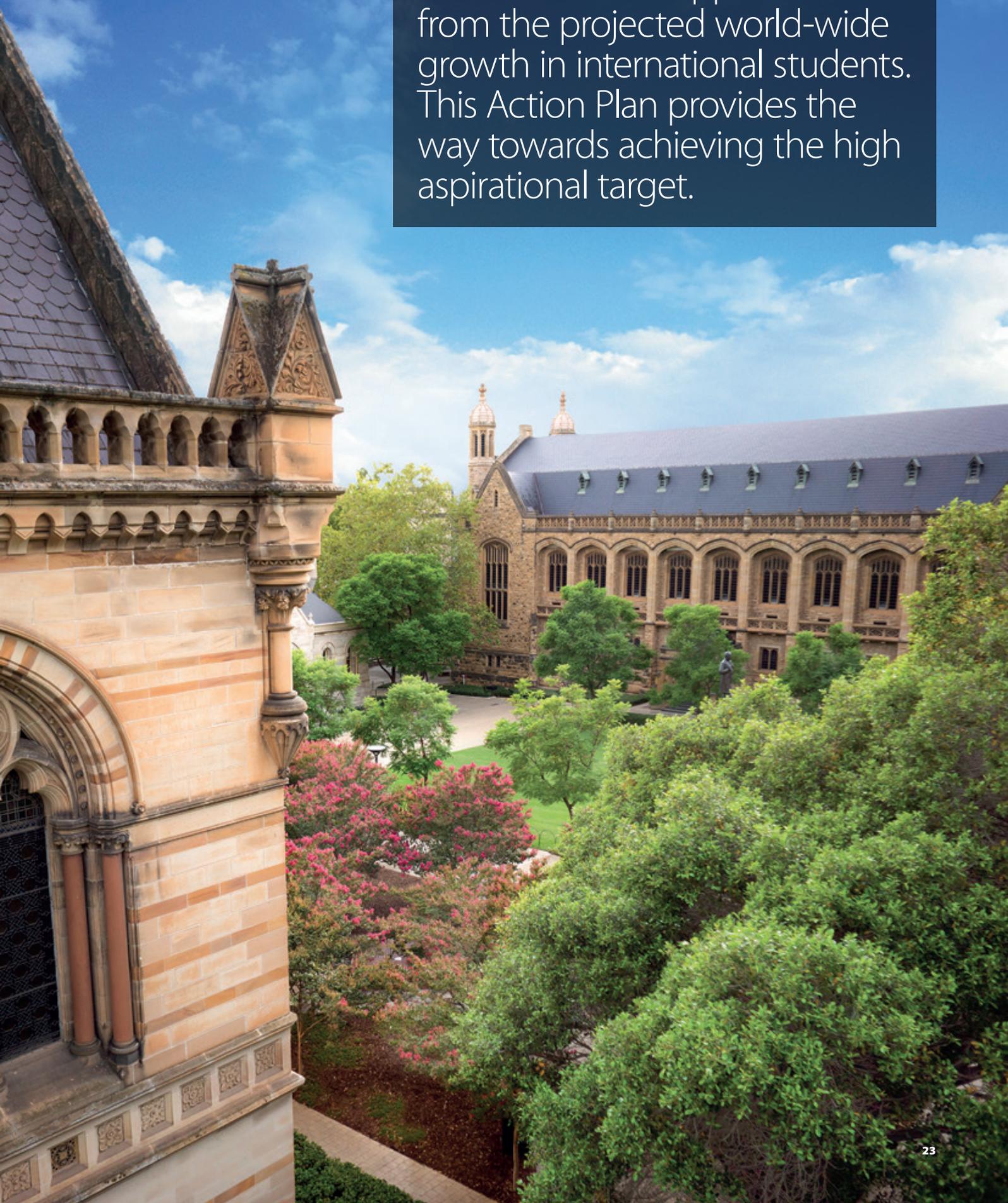
A range of international and offshore opportunities to make the SA international student sector marketing efforts more effective include:

- Cooperative promotions – encouraging cooperative promotions between providers including whole of state approaches to trade fairs and education agents
- Coordinated offshore marketing – consider adopting the UK model for the provision of information, advice and admissions services for all SA education providers operating internationally
- Country plans – develop coordinated market development plans into specifically agreed countries to diversify student cohorts and enter emerging markets
- Competitive advantage – review the unique proposition for SA as a study destination to position the state internationally in consultation with Austrade
- Destination marketing – more clearly articulate the positive student destination image and significantly increase destination marketing efforts particularly in new and emerging markets including targeting parent and opinion influencers
- Diversifying markets – cooperative efforts made to identify new emerging markets and to diversify markets to offset key market concentration and risk
- Joint programs – encourage the development of more joint programs with study off and onshore
- Offshore campuses – encourage the development of more SA providers establishing offshore campuses leading to increased onshore student numbers
- Offshore offices – embedding education officers in key overseas offices
- Pathway improvements – facilitate improved pathway opportunities between SA educational institutions including joint offers to international students
- Scholarships – determine key opportunities for targeted SA scholarships
- School students – provide a stronger focus on school students as a key educational pathway to other SA institutions and investigate alternative demographics for school age children such as earlier grade starts at SA schools
- Scope Global – determine the range of services that could be provided through Scope Global network and offices
- Sister State relations – using key government to government relationships in China, India, Indonesia, Malaysia and Vietnam to grow student numbers
- South Australian Certificate of Education (SACE) – investigate opportunities to expand the delivery of SACE in other countries/regions to better link students to SA educational opportunities. This has been very successful in Malaysia
- Tourism – integration of tourism and education promotions in specific markets
- Trade missions – linking trade missions to education trade fairs so that trade missions are conducted at the same time as international education trade fairs
- Whole of State approach – implement a whole-of-state approach to new and existing markets.





South Australia is well placed to maximise the opportunities from the projected world-wide growth in international students. This Action Plan provides the way towards achieving the high aspirational target.



South Australia's economic future, local jobs and enterprise together with our sense of place in the world are all influenced by our performance in attracting and supporting international students. If South Australia is to remain internationally engaged, we need to grow international student enrolments and optimise the opportunity for economic and population growth this industry offers. This Action Plan sets out a pathway to achieve these goals.

**The Hon Martin Hamilton-Smith**  
Minister for Investment and Trade





# Contact

## Department of State Development

Level 9, 131 Grenfell Street,  
Adelaide, South Australia 5000

GPO Box 320

Adelaide, South Australia 5001

E: [DSD.InternationalandHigherEd@sa.gov.au](mailto:DSD.InternationalandHigherEd@sa.gov.au)

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