Австралия: как ресурсный придаток запада построил отличную систему высшего образования?

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Содержание презентации

- Институциональные особенности системы высшего образования в Австралии
- Каковы основания считать, что система ВО Австралии – отличная?
- Когда и как она стала таковой?

Организации высшего образования в Австралии:

• **Australian universities**: each university is set up under its own legislation, accredits its own courses and degrees, does both teaching and research in a range of fields.
• **Australian university of Specialisation**: a self-accrediting university that does teaching and research in a particular field.
• **Overseas universities**: a university set up in a foreign jurisdiction that operates a branch in Australia.
• **Other higher education providers** or HEPs: this includes all HEPs that are not in any of the above categories—a small number accredit their own courses and awards but most are subject to course accreditation by TEQSA.

National Register summary table

The National Register is the authoritative source of information on the status of registered higher education providers in Australia. You can search by provider or course.

Provider category	SAA*	Non-SAA	Total
Higher Education Provider	11	123	134
Australian University	40	0	40
Australian University College	1	0	1
Australian University of Specialisation	1	0	1
Overseas University	1	0	1
Total providers	**54**	**123**	**177**

*SAA = Self-accrediting Authority (a provider can self-accredit some or all of its courses)

(минимальный срок действия аккредитации – 2 года, типичный срок аккредитации – не более 7 лет)

TESQA. 2020. National Register for Providers and Courses.
https://www.teqsa.gov.au/national-register

Группы университетов

ATN (1975 / 1988) – Australian Technology Network – 5 (4 since 2018) members that were former technical institutes. All located in CBDs of the State capitals, enrolling total of 1/3 FTE students, providing mostly degrees (as opposed to diplomas) and focused on applied research.

Go8 (1999) – Group of Eight – Largest, oldest, top-ranked universities. Receive in total 2x research funding from government compared to other 32 universities.

IRU (2003) – Innovative Research Universities – 7 members, all are comprehensive universities established after 1960. Research focus is on the translation and commercialisation of research on issues of critical importance to the communities in which they are based and addressing problems of national and global scale.

RUN (2011) – Regional Universities Network – 7 members that are all regionally based (that is, outside of State capitals), To build institutional capacity and sustainability through the sharing of best practice in educational delivery, training, research and organisational management, particularly with reference to regional contexts.

AUSTRALIAN TECHNOLOGY NETWORK OF UNIVERSITIES

GROUP OF EIGHT AUSTRALIA

Innovative Research Universities

run Regional Universities Network
REGIONAL STRENGTH. NATIONAL SUCCESS.

Австралийские университеты в международных рейтингах

Average World Rankings of the go8 Group of Eight Australian Universities

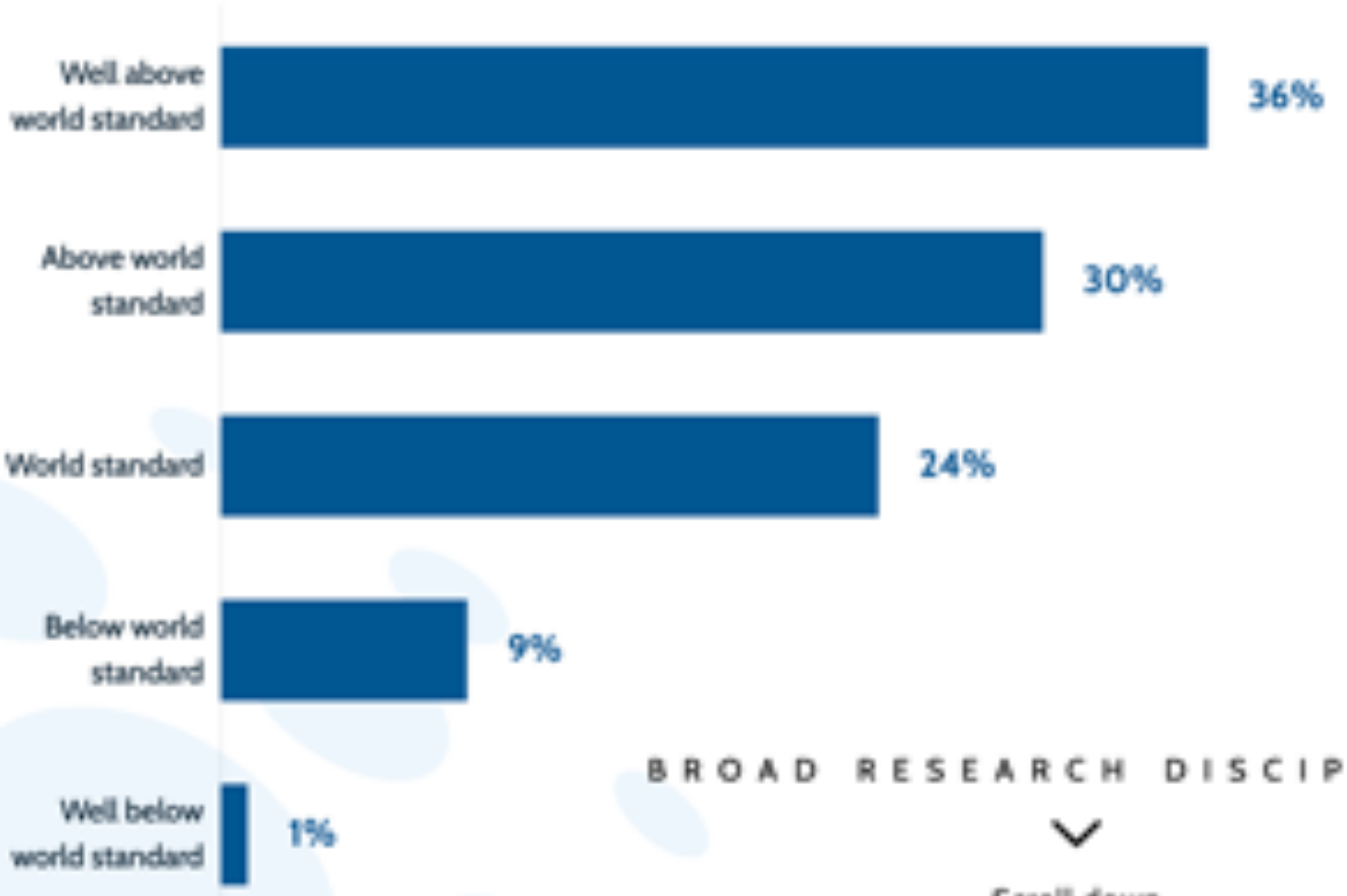
Rank		University	Average
1		University of Melbourne	33
2		University of Sydney	50
3		University of Queensland	54
4		Australian National University	54
5		Monash University	75
6		University of New South Wales	77
7		University of Western Australia	100
8		University of Adelaide	116

QS Australian Universities World Rankings

Aus Rank	University	QS Rank 2020	QS Rank 2019	QS Rank 2018
1	Australian National University	29	24	20
2	University of Melbourne	38	39	=41
3	University of Sydney	42	42	50
4	University of New South Wales	43	45	45
5	University of Queensland	47	48	=47
6	Monash University	58	59	60
7	University of Western Australia	86	91	=93
8	University of Adelaide	106	114	=109
9	University of Technology Sydney	140	160	176
10	University of Newcastle	207	214	=224
11	University of Wollongong	212	218	232
12	Queensland University of Technology	224	244	=247
13	Curtin University	230	=250	262
14	Macquarie University	237	=250	=240
15	RMIT University	238	=250	=247
16	Deakin University	271	309	=293
17	University of South Australia	274	264	=279
18	University of Tasmania	291	287	313
19	Griffith University	320	329	=325
20	James Cook University	377	369	=367
21	Swinburne University of Technology	383	387	421-430
22	La Trobe University	400	397	360
23	Flinders University	424	478	551-600
24	Bond University	442	443	431-440
25	Western Sydney University	468	498	551-600
26	University of Canberra	484	601-650	551-600
27	Murdoch University	571-580	591-600	501-550
=28	CQUniversity	601-650	601-650	601-650
=28	Victoria University	601-650	651-700	701-750
=30	Charles Darwin University	651-700	651-700	651-700
=30	Edith Cowan University	651-700	751-800	751-800
=32	Southern Cross University	751-800	801-1000	801-1000
=32	University of Southern Queensland	751-800	751-800	751-800
=34	Australian Catholic University	801-1000	801-1000	801-1000
=34	University of New England	801-1000	801-1000	801-1000
-	Charles Sturt University	-	801-1000	801-1000
-	University of the Sunshine Coast	-	801-1000	801-1000

Australian University Rankings. 2020. QS Australian Universities World Rankings. https://www.universityrankings.com.au/qs-australian-rankings.html

2018 Percentage of UoEs by rating



26% of UoEs improved their 2015 rating in 2018

BROAD RESEARCH DISCIPLINES

Scroll down

Australian Research Council. 2019. The State of Australian University Research 2018–19: ERA National Report. https://dataportal.arc.gov.au/ERA/NationalReport/2018/

Австралия как направление образовательного туризма

	Aus	USA	UK	France
Население, млн	25	329	66	65
GDP PPP, bln	$ 1,32	$ 21,20	$ 3,04	$ 2,7
GDP PPP p/c, 000	$52	$ 54,5	$ 45,7	$ 43
Университеты, n	41	5300	130	85

J. Smith. 2016. Australia's education and tourism exports are worth nearly as much as iron ore. https://www.ft.com/content/e9fd9d6a-cf9f-11e5-986a-62c79fcbcead

Стоимость обучения и другие характеристики систем ВО в Австралии, США и UK

Table 1 International undergraduate enrolments and costs

	Year(s)	Australia	UK	USA
Number of international undergraduate students	2004	120,500	114,800	178,700
	2012	192,600	198,700	244,800
International undergraduate students as a share of total international enrolment (%)	2004	60	38	34
	2012	60	46	40
International undergraduate students as a share of total national undergraduate enrolment (%)	2004	19	9	2
	2012	24	13	2
Annual fees ($US)	2013	25,375	19,291	25,226
Annual cost of living ($US)	2013	13,140	11,034	10,479
Annual total cost ($US)	2013	38,516	30,325	35,705
Number of universities in Shanghai (top 100)	2013	6	9	43
Number of universities in THS (top 100)	2013	5	9	52
Number of universities in QS (top 100)	2013	7	18	30

Min BS, Falvey R. International student flows for university education and the bilateral market integration of Australia. Higher Education (00181560). 2018;75(5):871-889. doi:10.1007/s10734-017-0175-4.

Изменение стоимости обучения

Table 8 Calculated annual cost of studying abroad for international students (US$000 pa)

Year	Australia			UK			US		
	Fees	CoL	Total	Fees	CoL	Total	Fees	CoL	Total
2001	7.13	5.06	12.19	6.87	7.59	14.46	13.46	7.96	21.42
2002	7.85	5.46	13.31	7.56	7.99	15.56	14.35	8.15	22.50
2003	9.91	6.74	16.66	8.86	8.83	17.70	15.38	8.30	23.69
2004	12.01	7.78	19.79	10.40	10.03	20.44	16.39	8.57	24.96
2005	13.21	8.28	21.49	10.84	10.17	21.01	17.39	8.87	26.26
2006	13.69	8.45	22.14	11.78	10.54	22.32	18.49	9.09	27.59
2007	15.86	9.68	25.54	14.54	11.72	26.26	19.52	9.34	28.86
2008	16.90	10.21	27.11	15.06	11.25	26.31	20.62	9.70	30.32
2009	16.57	9.68	26.24	13.68	9.70	23.38	21.60	9.66	31.26
2010	20.34	11.54	31.89	14.22	9.90	24.12	22.43	9.83	32.26
2011	24.19	13.37	37.56	15.52	10.73	26.25	23.47	10.13	33.60
2012	25.71	13.69	39.40	16.68	10.90	27.58	24.37	10.34	34.71
2013	25.38	13.14	38.52	19.29	11.03	30.33	25.23	10.48	35.71

Min BS, Falvey R. International student flows for university education and the bilateral market integration of Australia. Higher Education (00181560). 2018;75(5):871-889. doi:10.1007/s10734-017-0175-4.

Образование: третий по значимости экспортный продукт (?)

FIGURE 6. AUSTRALIA'S MAJOR EXPORTS, 2015[a]

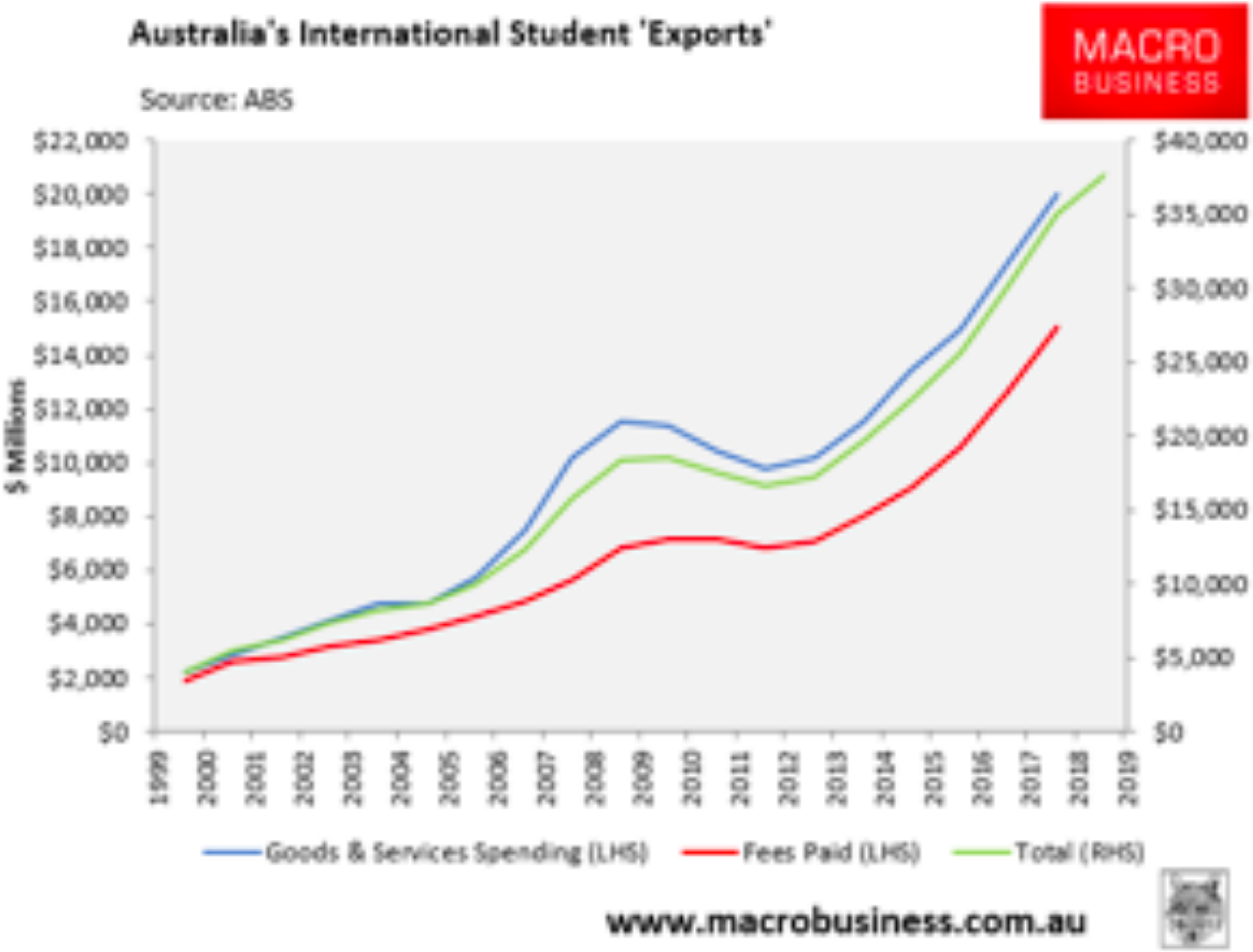
		AUDbn	% share
1	Iron ore and concentrates	48.9	15.4
2	Coal	37.5	11.8
3	Education	19.2	6.1
	Natural gas	16.5	5.2
	Tourism	15.8	5.0
	Gold (non-monetary)	15.4	4.9

Note: Education = Education-related travel services

D. Scutt. 2016. Australia's education and tourism exports are worth nearly as much as iron ore.
https://www.businessinsider.com.au/australias-education-and-tourism-exports-were-worth-42-billion-last-year-2016-4

Образование: третий по значимости экспортный продукт (?)

Плата за обучение – меньшая часть доходов от экспорта образования



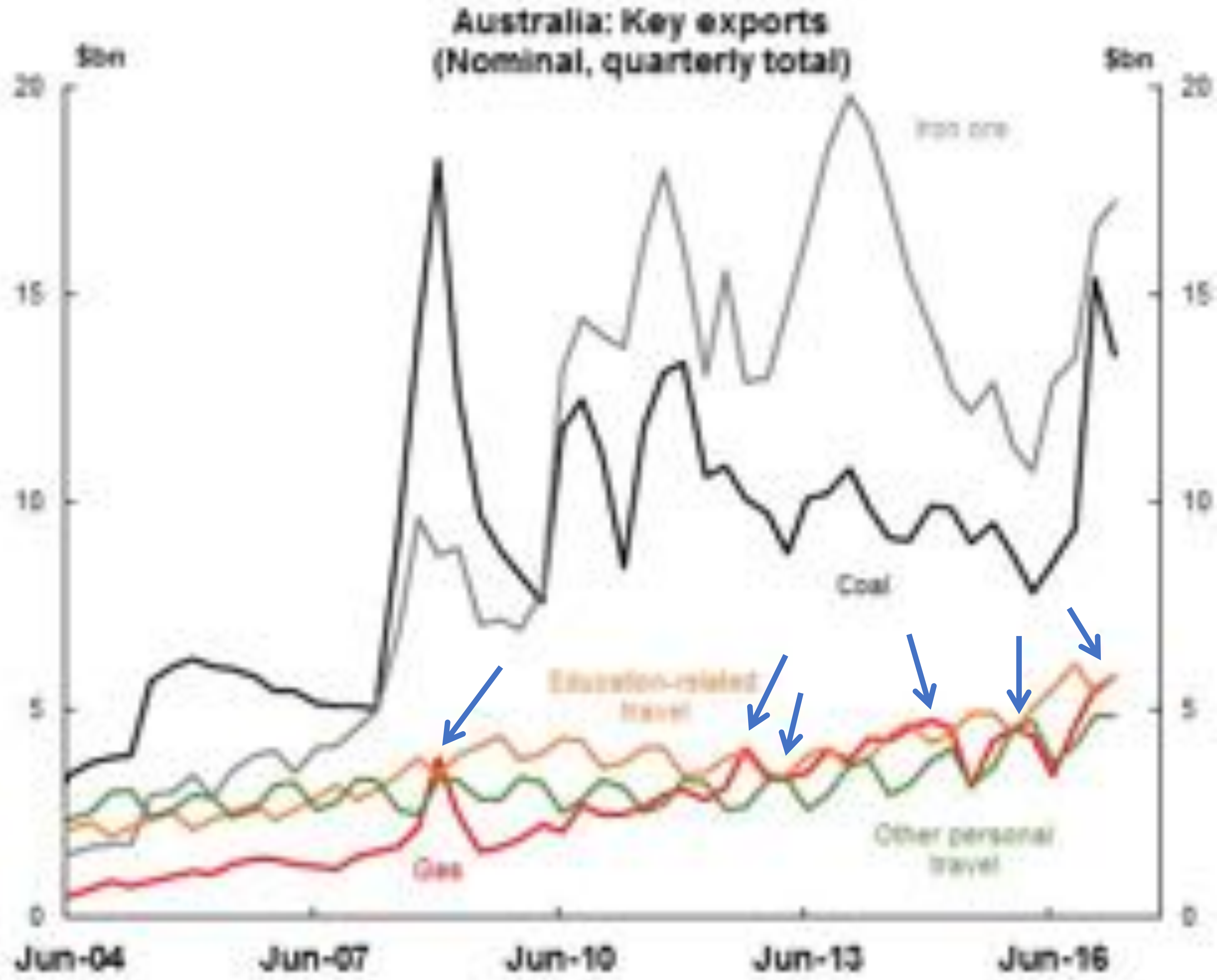
L. van Onselen. 2019. Australia's $37.6b international student export con. https://www.macrobusiness.com.au/2019/11/australias-37-6b-international-student-export-con/

Образование: третий по значимости экспортный продукт (?)

1. Высокая доля образовательных услуг в составе экспорта – абсолютно не новый тренд

2. Не третий по значимости продукт, а входящий в топ-5

M. Higgins. 2017. Educating international students is now big business in Australia. https://milfordasset.com/insights/educating-international-students-is-now-big-business-in-australia



Образование: третий по значимости экспортный продукт (?)

Like most arguments canvassed to support Australia's extreme concentration of international students, the $37.6 billion 'export' figure is a mirage. The true value, while unknown, is likely much lower, as are the purported benefits.

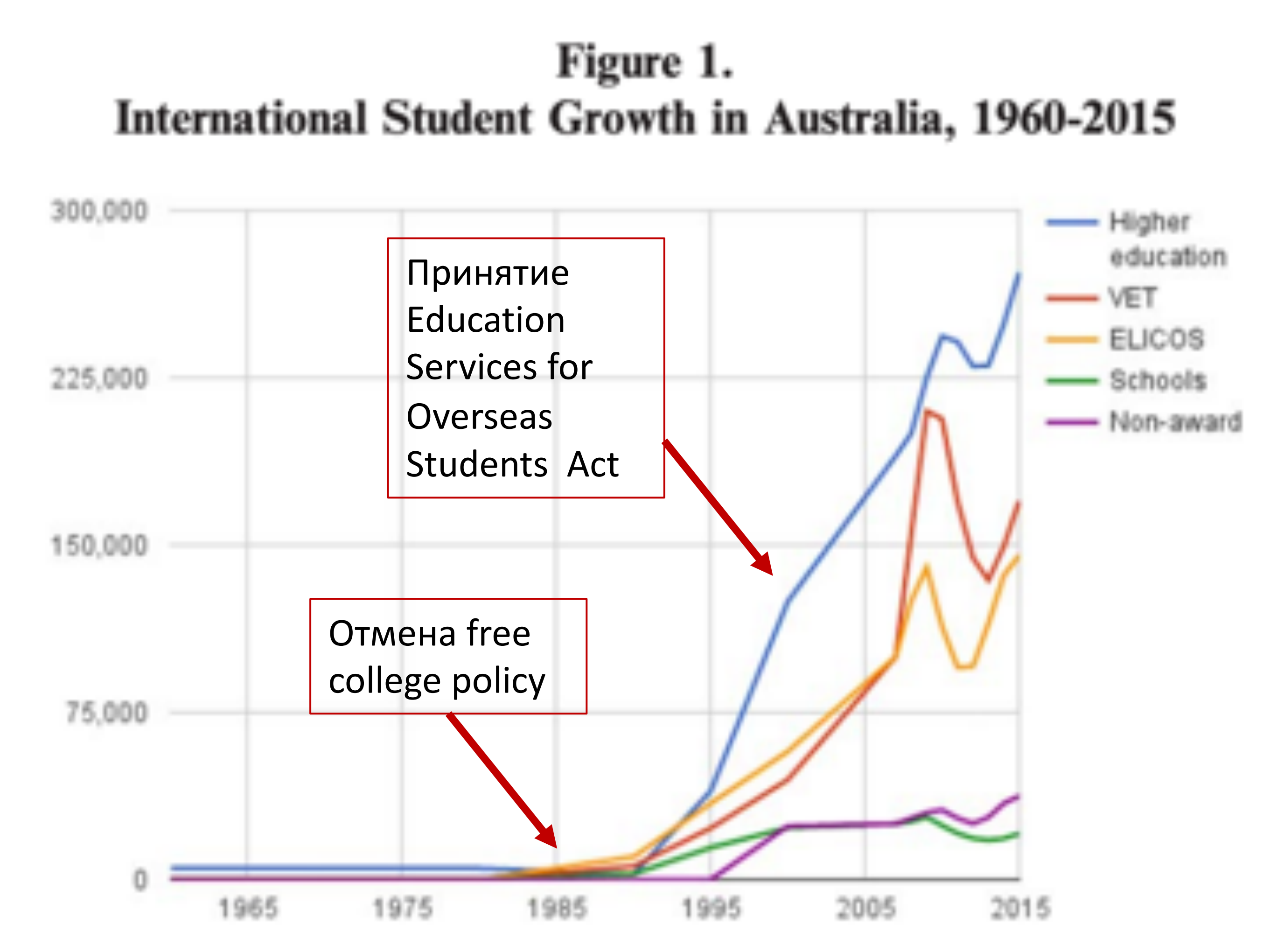
L. van Onselen. 2019. Australia's $37.6b international student export con. https://www.macrobusiness.com.au/2019/11/australias-37-6b-international-student-export-con/

Table 5: Australia's education and other exports by major category, expressed as a percentage of total Australian exports, 2002-2018

Year	Education-related	Other travel	All other services	Agriculture	Minerals	Manufactures	All other goods
2002	4.0%	7.4%	12.1%	18.5%	35.0%	22.3%	0.8%
2003	5.0%	8.0%	12.7%	15.3%	34.6%	23.7%	0.6%
2004	5.3%	7.7%	12.0%	17.0%	34.7%	22.7%	0.7%
2005	4.8%	7.5%	10.9%	13.5%	41.0%	21.6%	0.7%
2006	4.7%	6.4%	11.0%	12.3%	45.0%	19.8%	0.8%
2007	5.6%	6.4%	11.5%	10.6%	44.9%	20.2%	0.7%
2008	5.7%	5.2%	9.5%	10.0%	53.0%	16.0%	0.7%
2009	7.3%	5.8%	9.2%	10.7%	50.7%	15.6%	0.7%
2010	6.5%	5.0%	8.2%	9.5%	56.0%	14.3%	0.6%
2011	5.5%	4.5%	7.6%	10.6%	58.5%	12.7%	0.6%
2012	5.5%	4.7%	8.2%	11.4%	56.3%	13.2%	0.6%
2013	5.4%	4.9%	8.3%	11.7%	56.6%	12.5%	0.6%
2014	6.0%	5.2%	8.6%	12.2%	55.1%	12.4%	0.6%
2015	7.0%	6.1%	9.5%	14.0%	49.2%	13.6%	0.6%
2016	7.7%	6.3%	9.2%	12.6%	50.4%	13.3%	0.6%
2017	7.8%	5.5%	8.6%	12.5%	53.5%	11.5%	0.5%
2018	8.0% x2	5.2%	8.1%	10.8%	56.7% x1.6	10.8% x0.5	0.5%

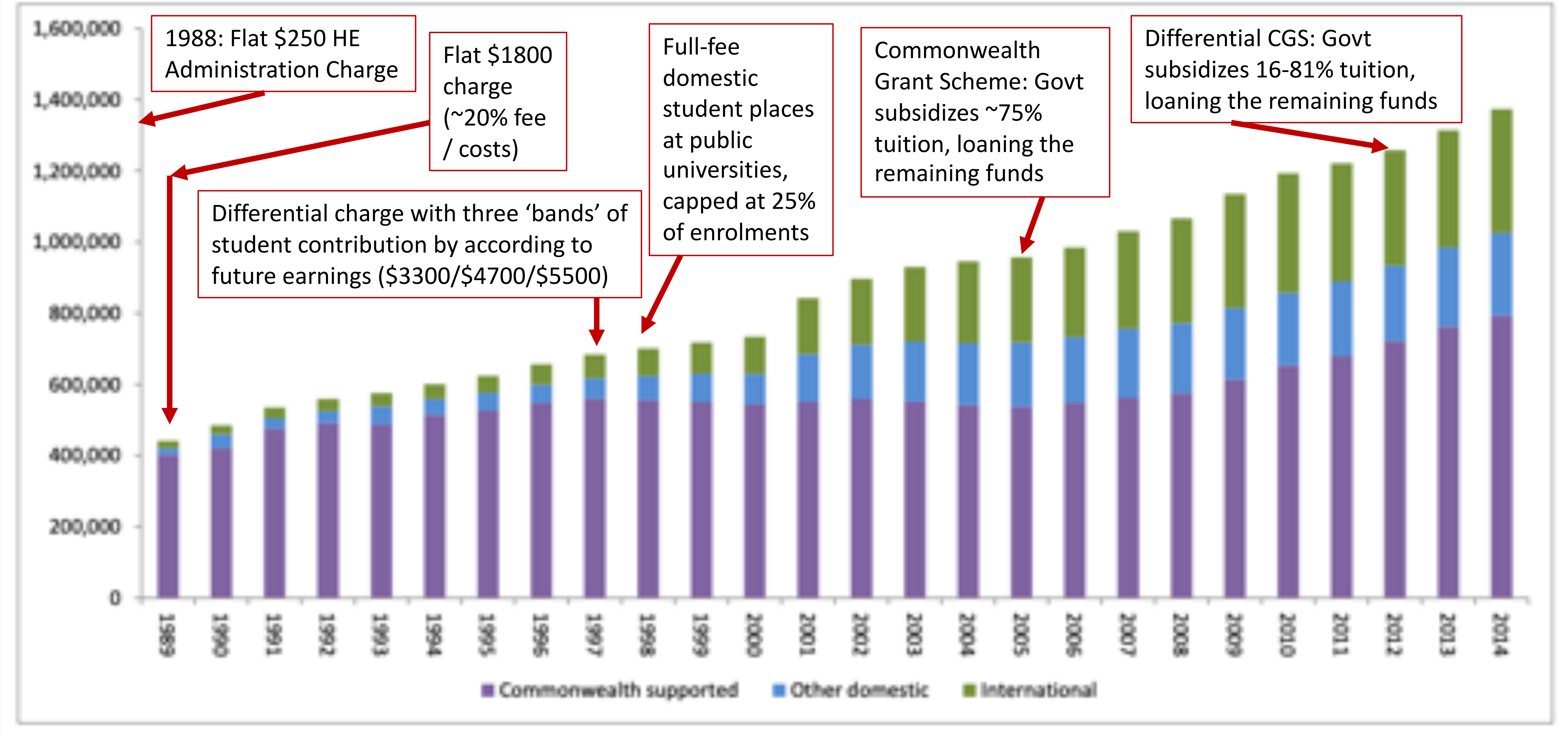
Source: Australian Government, Australian Bureau of Statistics, catalog 5368.0: 'International trade in goods and services, Australia, February 2019', Tables 3 and 11a, http://www.abs.gov.au/AUSSTATS/abs@.nsf/DetailsPage/5368.0Feb%202019?OpenDocument

Динамика количества иностранных студентов в Австралии на программах различного уровня



Laifer, N., & Kitchen, N. (2017). Making Soft Power Work: Theory and Practice in Australia's International Education Policy. *Politics & Policy*, *45*(5), 813–840.

Численность студентов и ключевые реформы в области финансирования образования



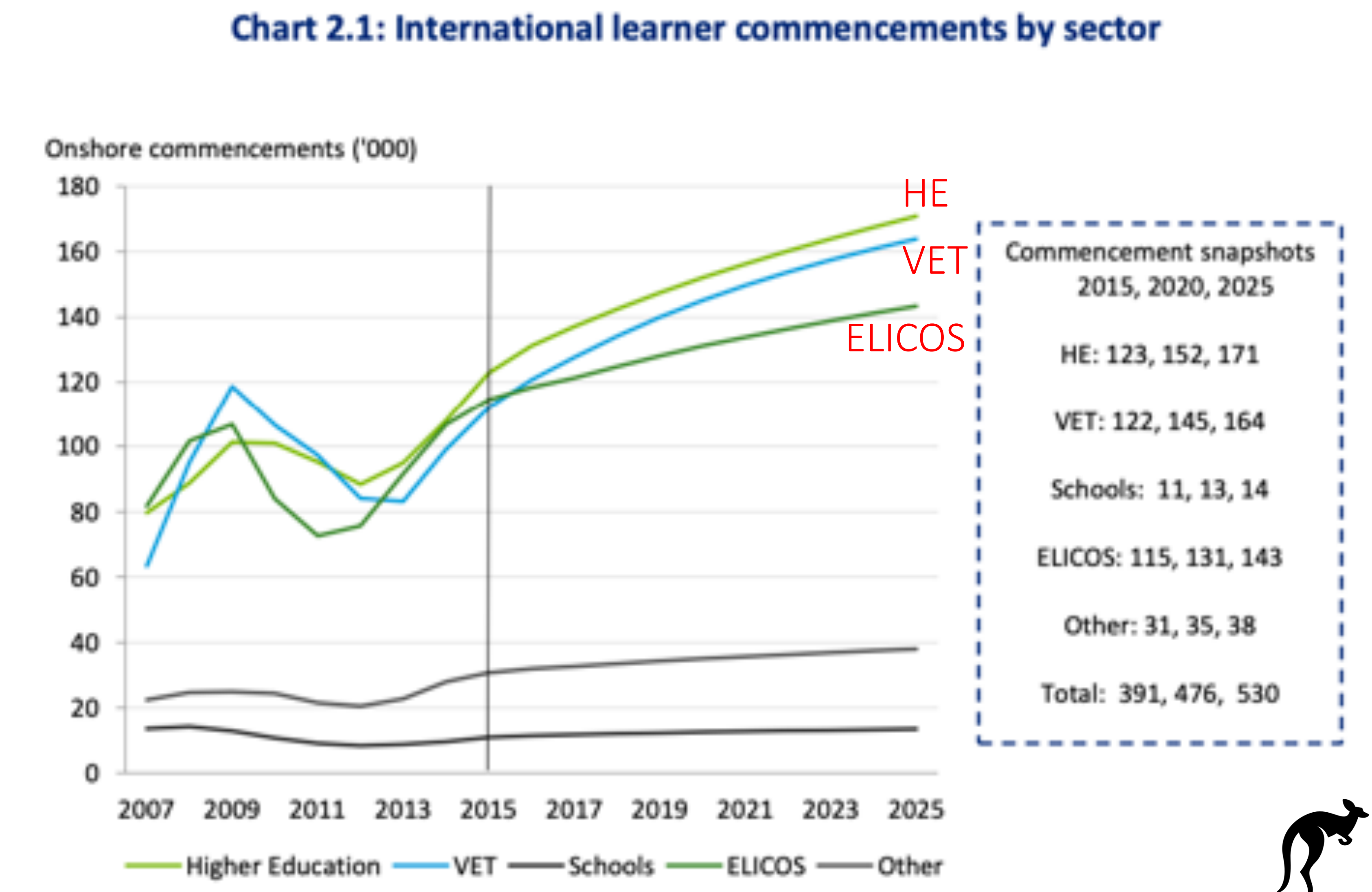
DEFT. 2015. Higher Education in Australia A review of reviews from Dawkins to today. https://vital.voced.edu.au/vital/access/services/Download/ngv:70703/SOURCE201?view=true

Table 1. International student enrolments at Australian universities for largest 10 source countries.

Country	China	India	Malaysia	Indonesia	Singapore	Vietnam	Korea	Nepal	Pakistan	Thailand
2002	27,427	9,072	14,375	12,847	10,819	1,816	4,026	993	1,315	5,130
2003	36,995	12,426	16,339	12,975	10,560	2,106	4,883	837	1,298	5,898
2004	47,417	18,025	16,724	12,017	9,564	2,343	5,592	678	1,359	5,936
2005	57,892	22,560	16,108	10,890	8,656	2,645	6,187	697	1,477	5,457
2006	62,361	25,527	15,530	9,994	8,124	2,959	6,664	1,195	1,778	5,107
2007	64,461	27,102	15,804	9,239	7,723	3,543	7,324	2,816	2,189	4,905
2008	69,500	28,442	16,380	8,825	7,733	4,994	7,987	3,663	2,466	4,405
2009	82,460	28,041	18,071	9,254	8,262	7,453	8,496	4,098	2,834	4,249
2010	96,104	21,969	18,410	9,390	8,483	9,701	8,696	5,168	3,114	4,156
2011	100,045	15,402	17,944	9,331	8,430	10,868	8,671	6,776	3,274	3,703
2012	95,841	12,638	16,281	9,015	8,143	10,998	8,231	7,094	4,077	3,434
2013	93,255	16,655	14,965	8,717	7,809	11,139	7,450	8,011	5,592	3,155
2014	97,186	26,240	14,345	8,469	7,414	11,925	6,589	10,149	7,239	2,887
2015	105,056	35,137	14,400	8,469	7,257	12,697	5,814	12,179	9,034	2,662
2016	121,110	44,365	14,596	8,738	7,052	13,815	5,315	15,136	10,086	2,553
2017	142,779	54,376	14,680	9,293	7,214	15,092	5,083	21,481	11,000	2,586
Total	1,299,889	397,977	254,952	157,463	133,243	124,094	107,008	100,971	68,132	66,223
$\frac{2017}{2002}$	x5.2	x5.99	x1.02	x0.72	x0.67	x8.3	x1.26	x21.6	x8.3	x0.5

Gwilym Croucher, Zhou Zhong, Kenneth Moore, Jonathan Chew & Hamish Coates (2019) Higher education student finance between China and Australia: towards an international political economy analysis, Journal of Higher Education Policy and Management, 41:6, 585-599, DOI: 10.1080/1360080X.2019.1627066

Текущие и прогнозные объемы набора иностранных студентов на программы различных уровней



Deloitte. 2015. Growth and Opportunity in Australian International Education. https://www.austrade.gov.au/ArticleDocuments/6722/DAE%20EduWorld%20Austrade%20Report.pdf.aspx

Стипендиальные программы поддержки иностранных студентов: The Colombo Plan

- In the early 1950s, Australia embarked on its most ambitious public diplomacy attempt to engage with Asia: the Colombo Plan (Oakman 2004). The original scheme, was devised as a way for Australia to ‘project itself into the region’ by engaging with Asia strategically, economically and culturally (Oakman 2004).

- The Colombo Plan has 4 permanent programmes:
  - Drug Advisory Programme (DAP)
  - Capacity Building Programme
  - Gender Affairs Programme (GAP)
  - Environment Programme

Bradley McConachie (2019) Australia’s use of international education as public diplomacy in China: foreign policy or domestic agenda?, Australian Journal of International Affairs, 73:2, 198-211, DOI: 10.1080/10357718.2019.1568388

New Colombo Plan:
Network of Australia studies centres

- The second program investigated in this study is the network of ASCs in China. The Australia-China Council (ACC) through the Foundation for Australian Studies (FASIC) is responsible for supporting a network of over 30 ASCs located in leading Chinese metropolitan and regional universities. This is a unique partnership between the government, corporate and university sectors to advance Australian studies and education in China.
- In addition, visiting Australian business leaders, students, academics or government officials can tap into an already existing network of interest in Australia's relations with China. The desktop audit of outcome reports, undertaken as part of this research shows that funding for the ASCs has remained static and the objectives have not changed since their inception.
- This network throughout China is seen as one of the Australian Government's leading public diplomacy and education engagement platforms. It is referred to in the Public Diplomacy Strategy as a 'leading example of government, university and private sector partnership (Department of Foreign Affairs and Trade 2016b).'

Bradley McConachie (2019) Australia's use of international education as public diplomacy in China: foreign policy or domestic agenda?, Australian Journal of International Affairs, 73:2, 198-211, DOI: 10.1080/10357718.2019.1568388

Australia Awards Scholarships

Может ли высокий спрос на Австралийские программы ВО быть следствием щедрой государственной стипендиальной поддержки?

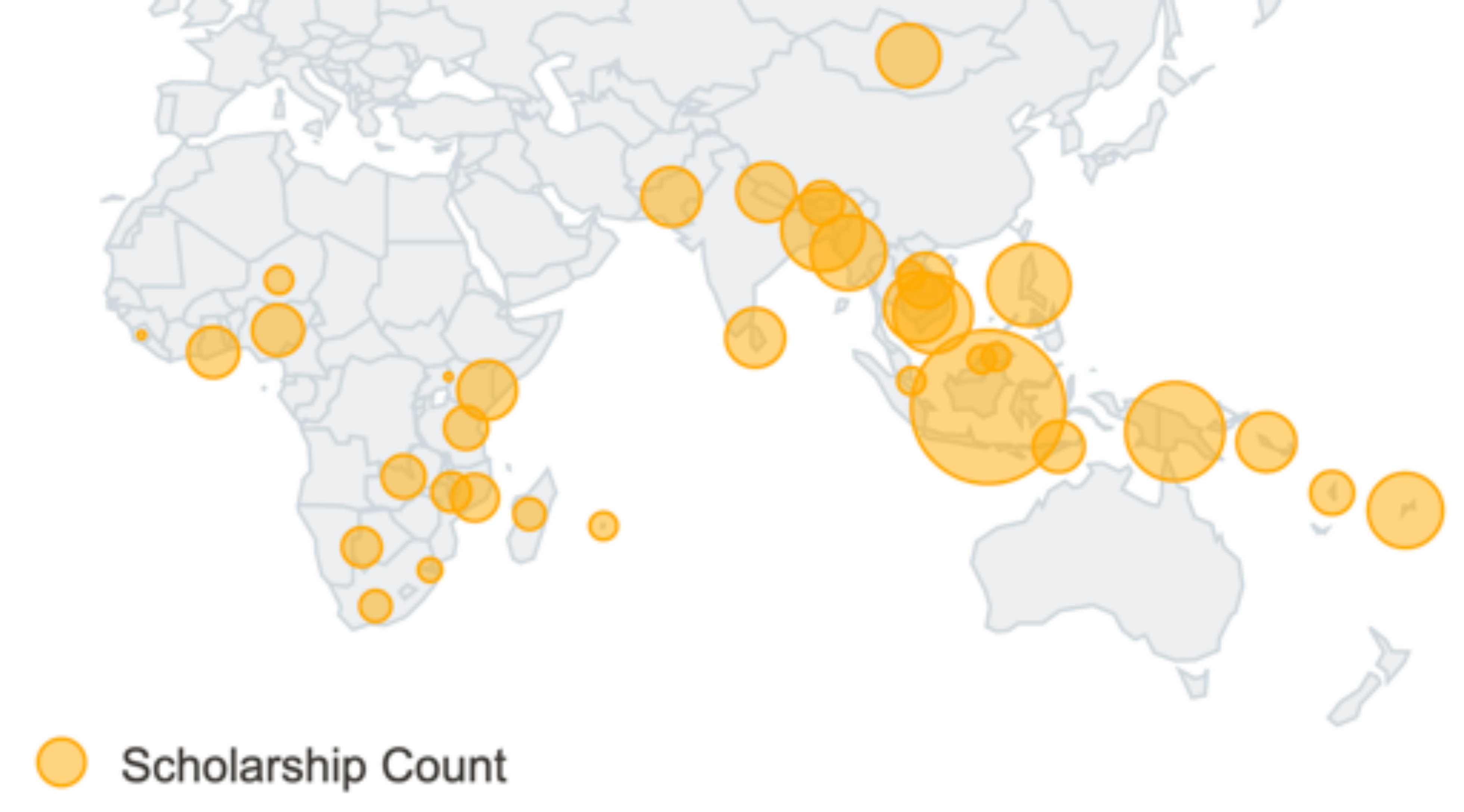
- The full costs of tuition fees for up to two years
- An economy class flight to and from Australia
- An approximate annual stipend of AUD30,000 to cover living expenses while in Australia
- Overseas Student Health Cover, which covers basic medical costs
- A once-off Establishment Allowance of AUD5,000 to assist with the costs of starting life in Australia and commencing the course (e.g. course books and materials, rental deposits, household items, etc.)
- Reunion airfare allowing them to travel home midway through the course. This is only available to scholars whose course is for two years or longer.

Australia Awards Short Courses:

- The full costs of tuition fees for the duration of the course
- Mobilisation travel from the home country to the course delivery location(s), and return to the home country Note: Excess baggage and travel insurance charges are not covered
- Visa expenses
- A modest per diem
- Accommodation
- Medical insurance for the duration of the short course.

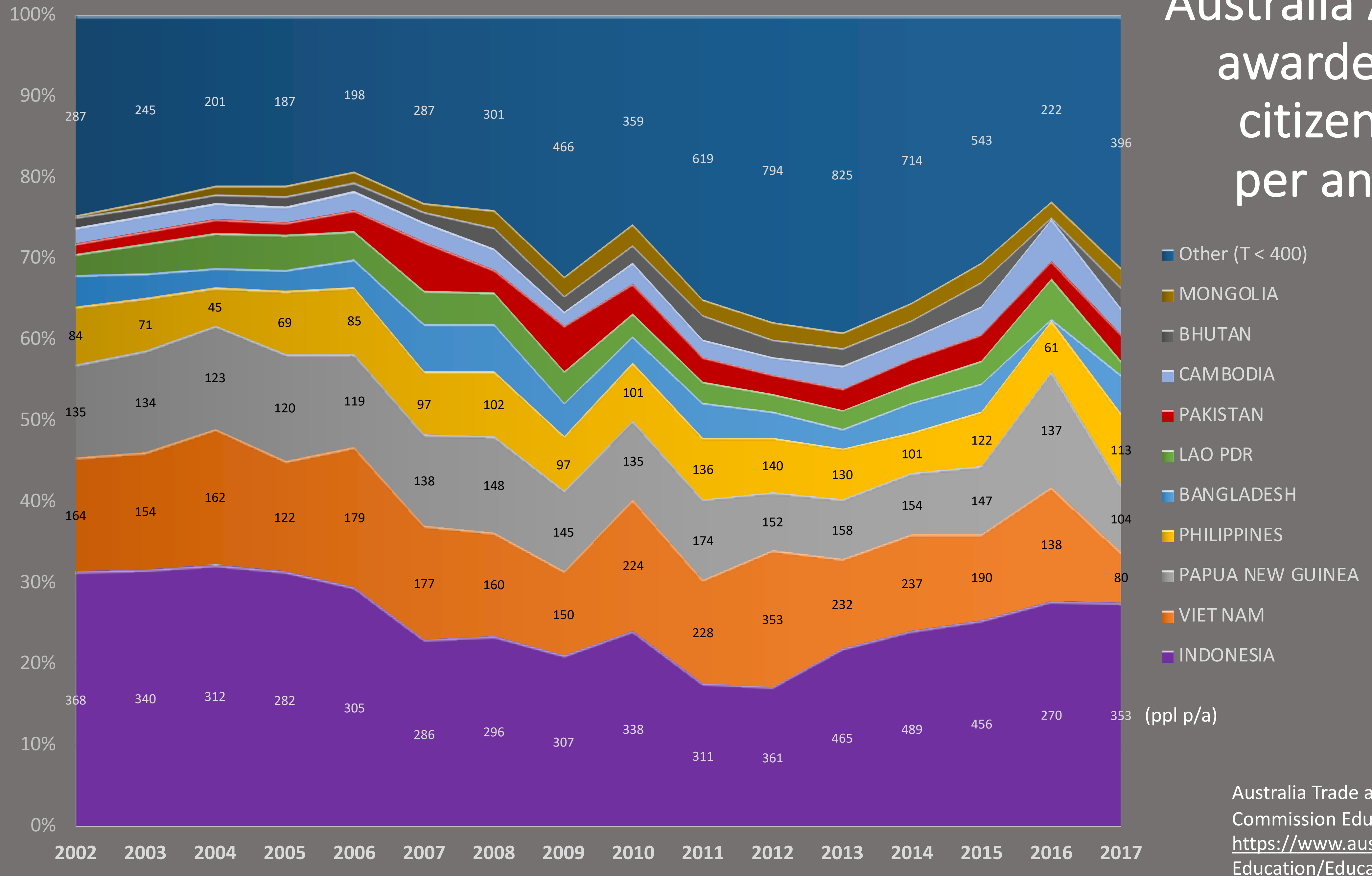
Australia Awards. 2020. What costs are covered by Australia Awards?
https://www.australiaawardsafrica.org/faqconc/what-costs-are-covered-by-australia-awards/

Australia Awards scholarships worldwide (2010-2019)



Australia Trade and Investment Commission Education Data. 2018. https://www.austrade.gov.au/Australian/Education/Education-data/Current-data/Australia-Awards

Australia Awards: awardees by citizenship per annum



Australia Trade and Investment Commission Education Data. 2018. https://www.austrade.gov.au/Australian/Education/Education-data/Current-data/Australia-Awards

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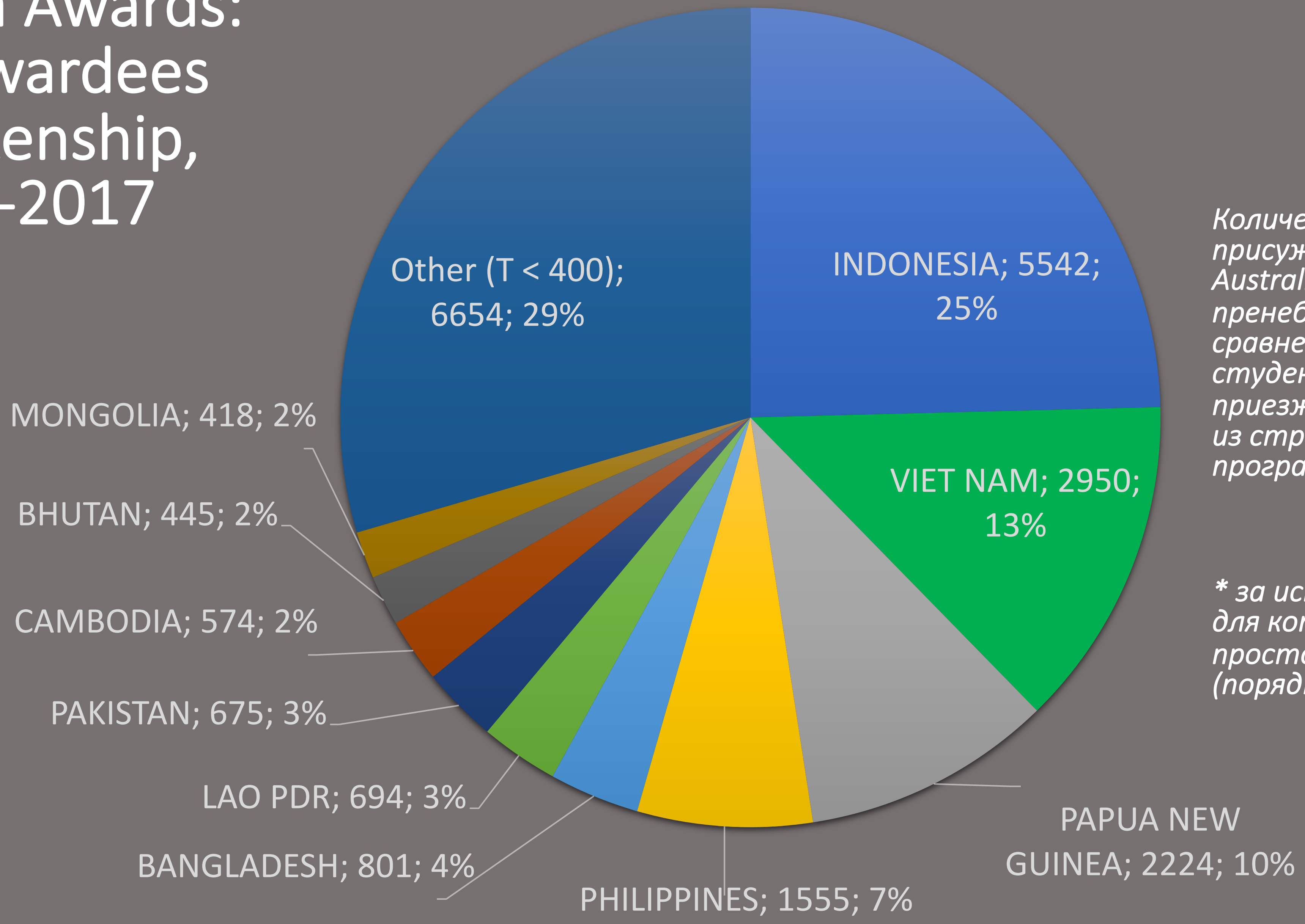
2003	36,995	12,426	16,339	12,975	10,560	2,106	4,883	837	1,298	5,898
2004	47,417	18,025	16,724	12,017	9,564	2,343	5,592	678	1,359	5,936
2005	57,892	22,560	16,108	10,890	8,656	2,645	6,187	697	1,477	5,457
2006	62,361	25,527	15,530	9,994	8,124	2,959	6,664	1,195	1,778	5,107
2007	64,461	27,102	15,804	9,239	7,723	3,543	7,324	2,816	2,189	4,905
2008	69,500	28,442	16,380	8,825	7,733	4,994	7,987	3,663	2,466	4,405
2009	82,460	28,041	18,071	9,254	8,262	7,453	8,496	4,098	2,834	4,249
2010	96,104	21,969	18,410	9,390	8,483	9,701	8,696	5,168	3,114	4,156
2011	100,045	15,402	17,944	9,331	8,430	10,868	8,671	6,776	3,274	3,703
2012	95,841	12,638	16,281	9,015	8,143	10,998	8,231	7,094	4,077	3,434
2013	93,255	16,655	14,965	8,717	7,809	11,139	7,450	8,011	5,592	3,155
2014	97,186	26,240	14,345	8,469	7,414	11,925	6,589	10,149	7,239	2,887
2015	105,056	35,137	14,400	8,469	7,257	12,697	5,814	12,179	9,034	2,662
2016	121,110	44,365	14,596	8,738	7,052	13,815	5,315	15,136	10,086	2,553
2017	142,779	54,376	14,680	9,293	7,214	15,092	5,083	21,481	11,000	2,586
Total	1,299,889	397,977	254,952	157,463	133,243	124,094	107,008	100,971	68,132	66,223
$\frac{2017}{2002}$	x5.2	x5.99	x1.02	x0.72	x0.67	x8.3	x1.26	x21.6	x8.3	x0.5

Gwilym Croucher, Zhou Zhong, Kenneth Moore, Jonathan Chew & Hamish Coates (2019) Higher education student finance between China and Australia: towards an international political economy analysis, Journal of Higher Education Policy and Management, 41:6, 585-599, DOI: 10.1080/1360080X.2019.1627066

Australia Trade and Investment Commission Education Data. 2018. https://www.austrade.gov.au/Australian/Education/Education-data/Current-data/Australia-Awards

Australia Awards: total awardees by citizenship, 2002-2017



*Количество грантов, присуждаемых по программе Australia Awards, пренебрежительно мало*по сравнению с численностью студентов, ежегодно приезжающих в Австралию из стран-участниц программы.*

** за исключением Индонезии, для которой это значение просто существенно ниже (порядка 4%)*

Несколько слов о Китайских студентах

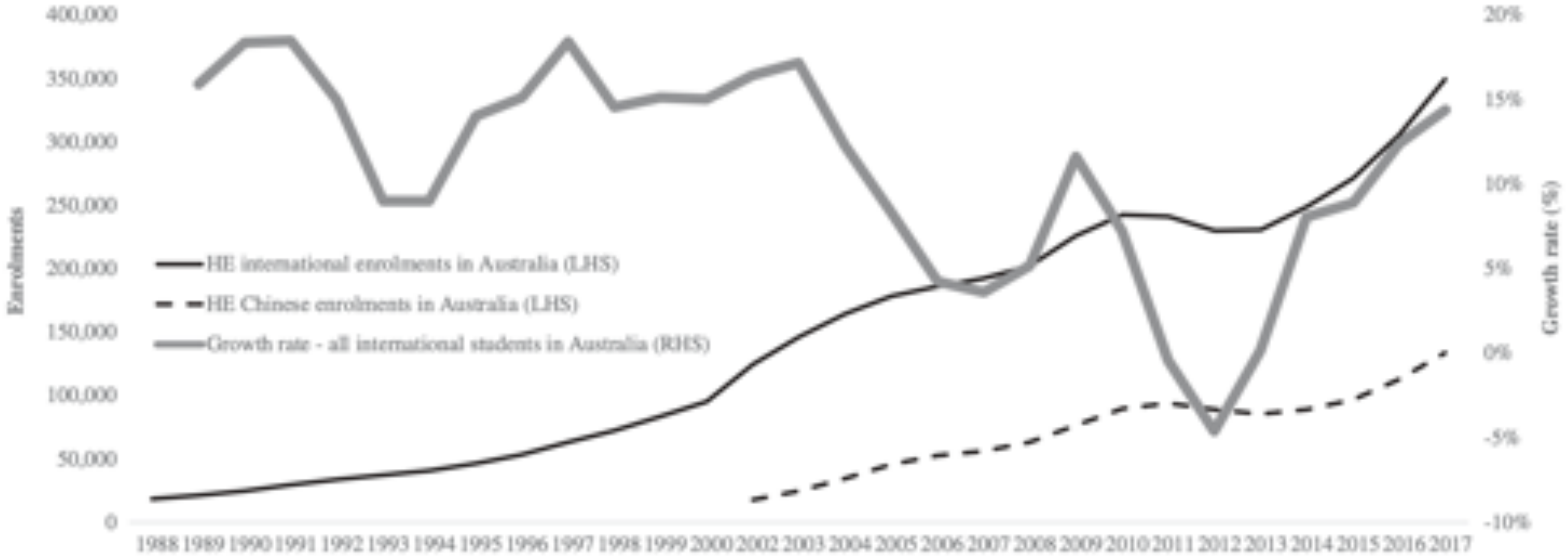


Figure 1. Growth rate of international enrolments in Australian higher education.

Gwilym Croucher, Zhou Zhong, Kenneth Moore, Jonathan Chew & Hamish Coates (2019) Higher education student finance between China and Australia: towards an international political economy analysis, Journal of Higher Education Policy and Management, 41:6, 585-599, DOI: 10.1080/1360080X.2019.1627066

Несколько слов о Китайских студентах

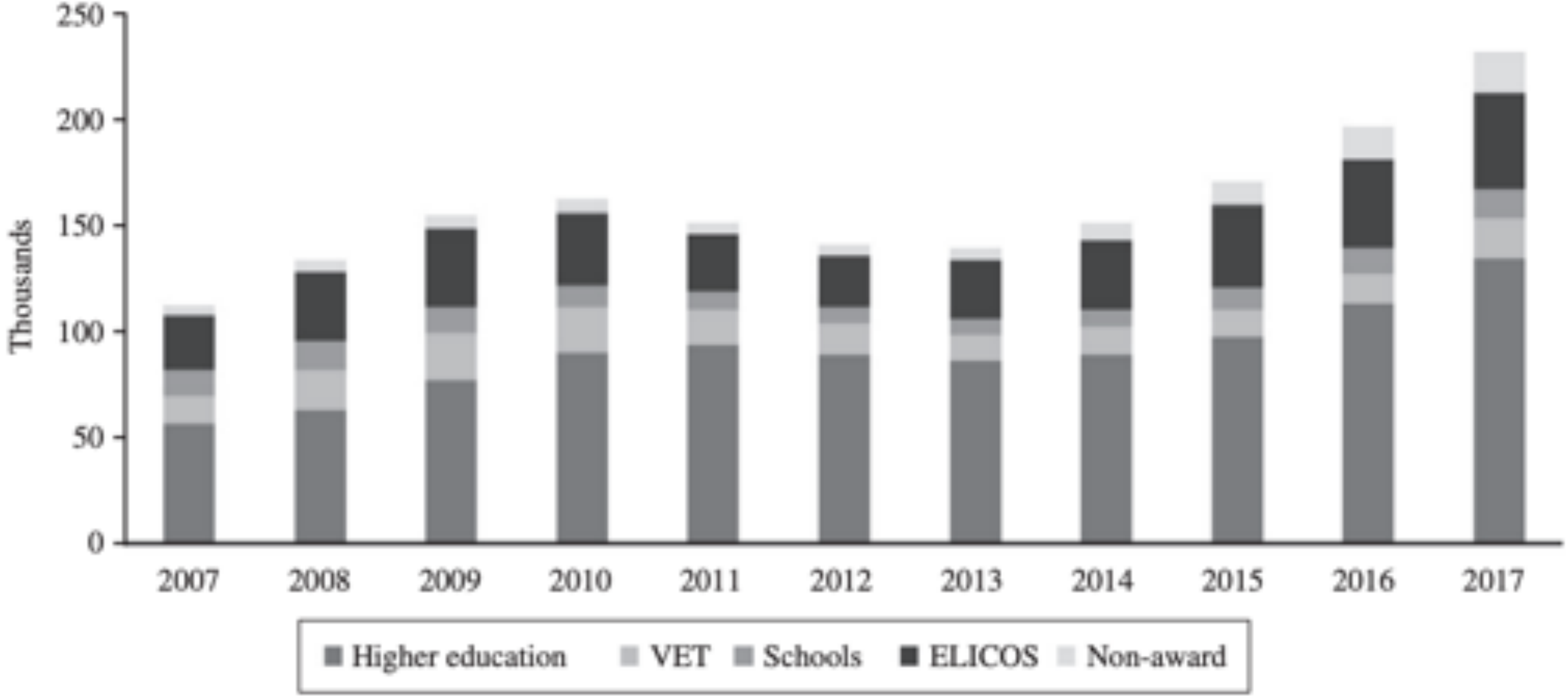


FIGURE 4 Number of international student enrolment by China, 2007–17

Xi, J., Zhou, W., & Wang, H. (2018). The impact of the China–Australia Free Trade Agreement on Australia's education exports to China: A legal and economic assessment. *World Economy*, *41*(12), 3503–3523.

Китай – рынок для экспорта Австралийского образования с наиболее высокой и возрастающей значимостью

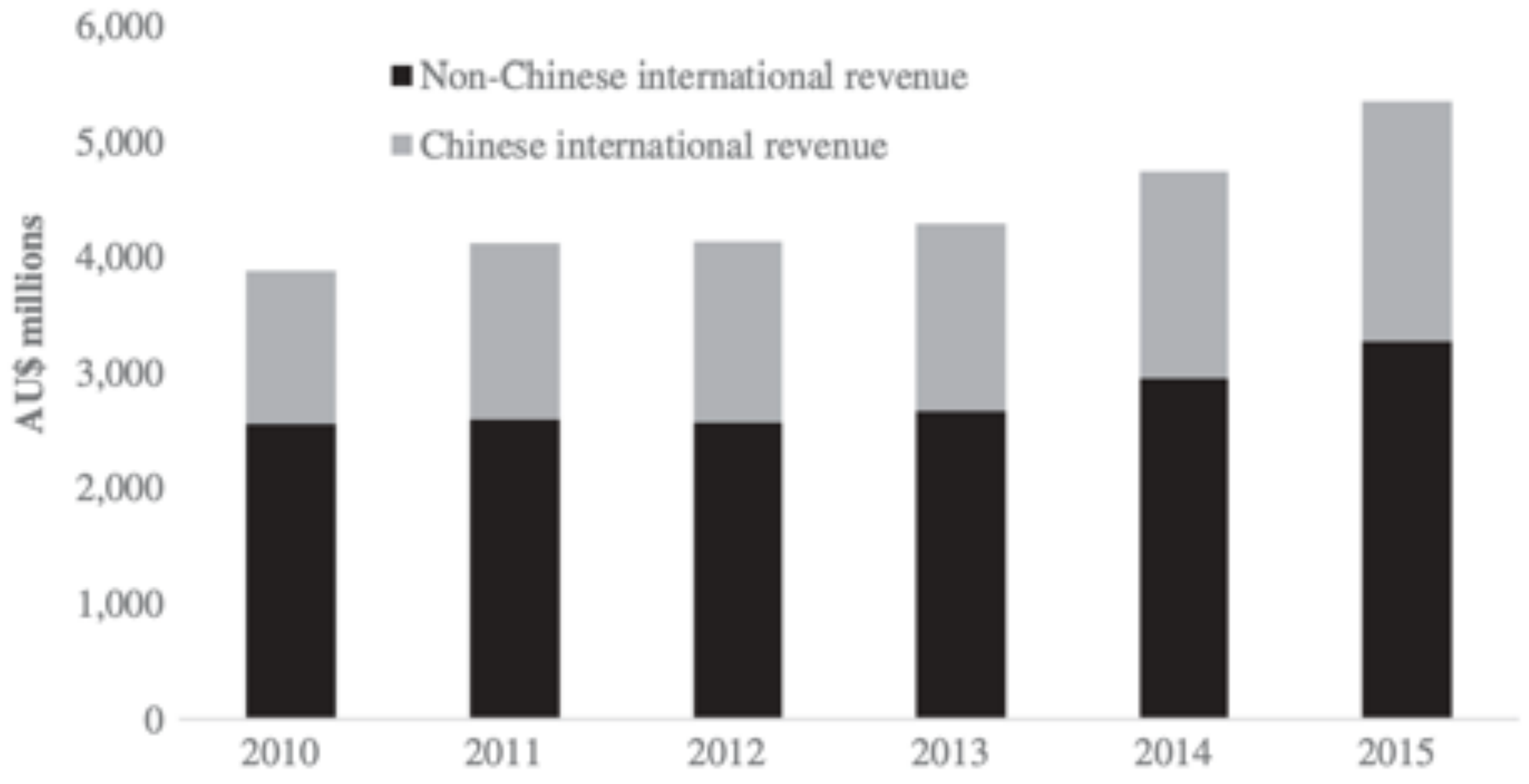


Figure 2. Australian university system-level growth in international student fee revenue.

Gwilym Croucher, Zhou Zhong, Kenneth Moore, Jonathan Chew & Hamish Coates (2019) Higher education student finance between China and Australia: towards an international political economy analysis, Journal of Higher Education Policy and Management, 41:6, 585-599, DOI: 10.1080/1360080X.2019.1627066

Table 2. Summary data for Australian university international student fee revenue.

	Total revenue (AU$,000)		International student fee revenue (AU$ 000,000)		Chinese international student fee revenue (AU$ 000,000)		International student fee revenue per cent of total		Chinese student fee revenue per cent of international	
	2010	2015	2010	2015	2010	2015	2010	2015	2010	2015
Sector	22,117	28,569	3,882	5,350	1,325	2,075	18%	19%	34%	39%
ATN	3,272	4,262	748	944	249	347	23%	22%	33%	37%
Go8	9,696	12,356	1,626	2,575	571	1,277	17%	21%	35%	50%
IRU	2,565	3,115	372	489	101	98	15%	16%	27%	20%
RUN	1,207	1,720	228	255	54	34	19%	15%	24%	13%
OTR	5,376	7,116	907	1087	350	320	17%	15%	39%	29%

ATN – Australian Technology Network – 5 members that were former technical institutes
Go8 – Group of Eight – all large research-intensive universities
IRU – Innovative Research Universities – 7 members, all universities established after 1960
RUN – Regional Universities Network – 6 members that are all regionally based
OTR –the remaining Australian universities which are not members of a mission group

Gwilym Croucher, Zhou Zhong, Kenneth Moore, Jonathan Chew & Hamish Coates (2019) Higher education student finance between China and Australia: towards an international political economy analysis, Journal of Higher Education Policy and Management, 41:6, 585-599, DOI: 10.1080/1360080X.2019.1627066

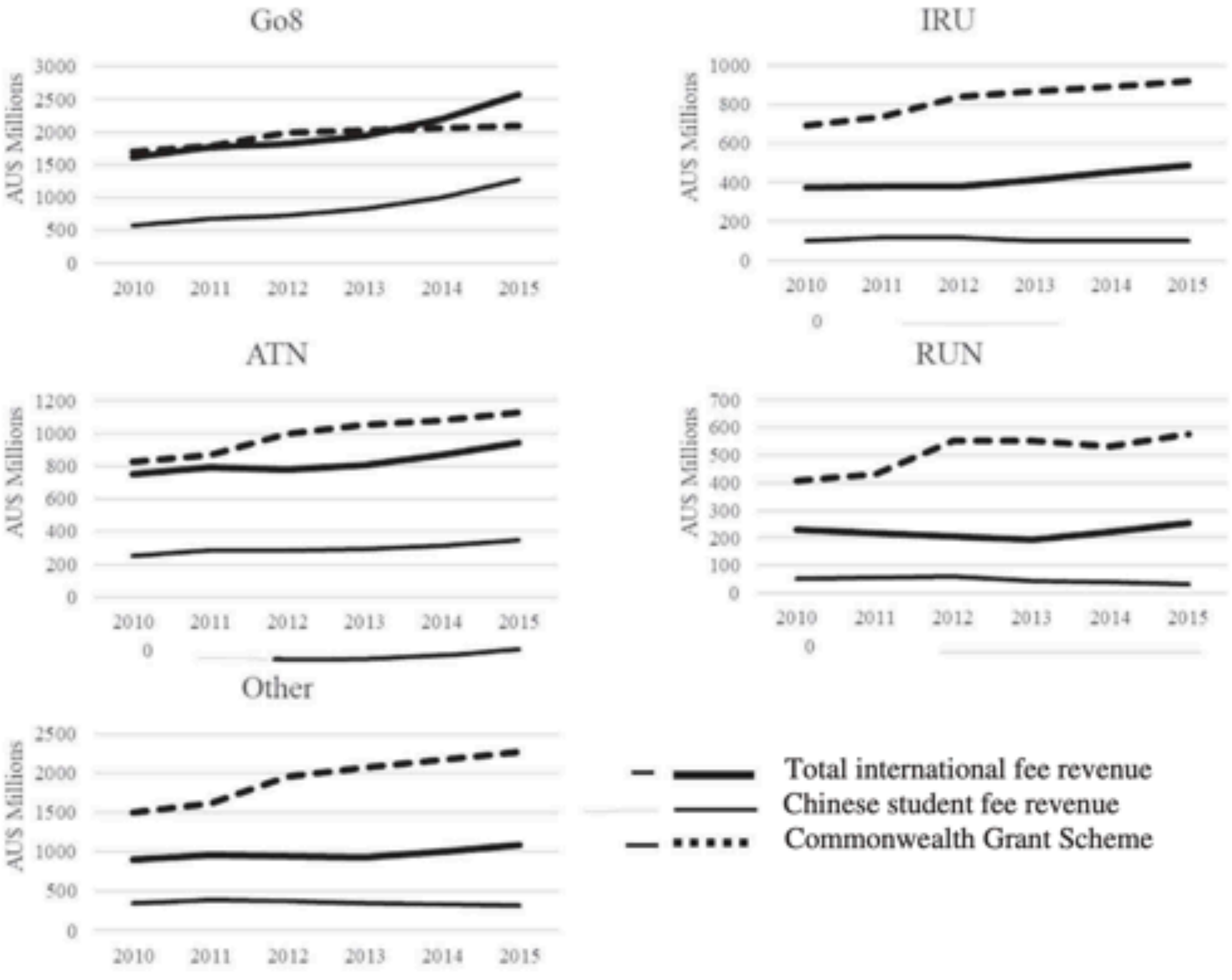


Figure 3. Total and international Australian university Chinese student fee revenue.

Распределение доходов от экспорта образования по группам университетов

В элитной группе доходы от иностранных студентов превышают доходы от КЦП, при этом китайские студенты обеспечивают ½ international student fees

Gwilym Croucher, Zhou Zhong, Kenneth Moore, Jonathan Chew & Hamish Coates (2019) Higher education student finance between China and Australia: towards an international political economy analysis, Journal of Higher Education Policy and Management, 41:6, 585-599, DOI: 10.1080/1360080X.2019.1627066

Факторы, связанные с желанием Китайских студентов поехать учиться в Австралию

(а не остаться дома)

Двусторонне торговое соглашение м/у Китаем и Австралией (2015 г.) ст. значимо связано со снижением спроса на «домашние» joint programs …

TABLE 4 Regression results

Independent variable	Dependent variable: programmes approved		Dependent variable: student enrolment, total				Dependent variable: student enrolment, higher education			
	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10
ChAFTA	−2.333***	−2.631**	0.329**	0.321***	0.189**	0.312*	0.358**	0.254***	0.260**	0.388*
	(0.649)	(1.106)	(0.084)	(0.080)	(0.084)	(0.156)	(0.123)	(0.074)	(0.082)	(0.176)
GDP per capita	6.059***									
	(0.983)									
Enrolment ratio		4.284**								
		(1.560)								
Exchange rate						0.018				0.849
						(0.802)				(0.990)
Streamlined visa processing				0.014	−0.008	−0.009		0.166	0.178	0.120
				(0.085)	(0.086)	(0.127)		(0.127)	(0.136)	(0.189)
Post-study work rights					0.036	0.035			−0.018	0.090
					(0.021)	(0.105)			(0.010)	(0.125)
Constant	−49.512***	−12.263**	11.863***	11.858***	11.858***	11.825***	11.281***	11.218***	11.218***	9.683***
	(8.219)	(5.145)	(0.047)	(0.080)	(0.086)	(1.411)	(0.093)	(0.127)	(0.136)	(1.703)
R^2	0.790	0.560	0.622	0.622	0.624	0.624	0.482	0.571	0.572	0.611

Notes: ***Statistically significant at 1% level. **Statistically significant at 5% level. *Statistically significant at 10% level.

… с и увеличением спроса на «выездную» учебу в Австралии …

… , а обменный курс, простота получения визы и возможность подрабатывать во время учебы ст. не значимы с т.з. спроса на учебу в А.

Xi, J., Zhou, W., & Wang, H. (2018). The impact of the China–Australia Free Trade Agreement on Australia's education exports to China: A legal and economic assessment. *World Economy*, *41*(12), 3503–3523. https://proxylibrary.hse.ru:2120/10.1111/twec.12736

Направления экспансии – 2025

Deloitte. 2015. Growth and Opportunity in Australian International Education.
https://www.austrade.gov.au/ArticleDocuments/6722/DAE%20EduWorld%20Austrade%20Report.pdf.aspx

Страны и сектора с наибольшим потенциалом импорта Австралийского образования

Table 2.1: Top eight source markets for Australia by enrolments all sectors 2015 – 2025 (baseline scenario)

Market ranking		2015	2020	2025	Annual growth rate	Enrolments in largest subsector in 2025 (% of total[17])
—	China	166,600	213,600	233,500	3.5%	Higher ed 145,900 (63%)
—	India	72,100	95,300	112,400	4.5%	Higher ed 58,100 (52%)
—	Vietnam	33,600	45,600	52,400	4.5%	Higher ed 23,000 (44%)
—	Thailand	28,800	39,200	43,600	4.2%	VET 20,700 (48%)
↑	Nepal	21,600	33,200	41,800	6.8%	Higher ed 23,900 (57%)
↑	Malaysia	23,700	32,000	35,700	4.2%	Higher ed 20,800 (58%)
↓	Brazil	25,100	30,700	32,200	2.5%	ELICOS 15,500 (48%)
↓	South Korea	28,200	30,500	31,900	1.3%	VET 16,700 (52%)

Deloitte. 2015. Growth and Opportunity in Australian International Education.
https://www.austrade.gov.au/ArticleDocuments/6722/DAE%20EduWorld%20Austrade%20Report.pdf.aspx

Основные модели экспорта и трансформация экспортных доходов в национальном бюджете

Самая выгодная для экономики страны модель экспорта – ввоз студентов. Остальные стратегии интересны постольку поскольку они позволяют наращивать soft power

Table 2.2: Assumptions of how $1 of fee revenue translates to value added across the scenarios

Scenario:	1. Onshore study	2. Borderless learner studying online with university in Australia	3. Borderless learners at an Australian campus overseas
Wages in Australia	0.51	Likely to be similar to or slightly lower than scenario 1	0 to 0.1
GOS in Australia	0.16	Likely to be similar to or slightly higher than scenario 1, found to be 0.32 for one university	-0.04 to 0.26 (based on financial results)
Indirect value added and production taxes in Australia	0.25	Likely to be slightly lower than scenario 1 (less expenditure on campus facilities)	0.01 to 0.05
Total value added	0.93	Likely to be similar or slightly lower than scenario 1	-0.03 to 0.41

Source: DAE report for Universities Australia 2015, DAE assumptions and analysis of offshore activity in various university Financial Reports.

At the same time, it is also acknowledged that offshore provision may serve broader strategic purposes which, over time, have the potential to realise economic value for Australia. There are also other, less-tangible benefits to borderless education, which go beyond their value-add to the Australian economy. Some of these benefits are described below.

Deloitte. 2015. Growth and Opportunity in Australian International Education.
https://www.austrade.gov.au/ArticleDocuments/6722/DAE%20EduWorld%20Austrade%20Report.pdf.aspx

Составные части успеха:

1. Quality of education
2. Overall study experience
3. Proximity
4. Strong framework


Deloitte Access Economics

Growth and opportunity in Australian International Education

A report prepared for Austrade

December 2015

EduWorld

Deloitte.

Deloitte. 2015. Growth and Opportunity in Australian International Education.
https://www.austrade.gov.au/ArticleDocuments/6722/DAE%20EduWorld%20Austrade%20Report.pdf.aspx

1. Quality of education

Institutional quality

On these measures, Australia has eight higher education institutes in the top 200 of QS World University Rankings, and 21 in the top 400 (QS Top Universities, 2015). University representatives note that although Australia may not be the top destination choice for learners, with the US and UK still generally regarded as the top destinations for higher education (HSBC, 2014), Australia could position itself to be the destination of choice for the 'middle-segment' of learners, particularly in large source markets such as China.

Course quality and specialised knowledge

Deloitte (2014) identified gas, tourism, agribusiness, health, and wealth managements as emerging sectors of Australian advantage, in addition to the existing strength area of mining.

Course recognition

While accreditation can be a time-consuming and onerous process for providers (as described in Section 4.1.6), it serves an important purpose in protecting Australia's reputation and ensuring the quality of training delivered to learners, onshore or borderless.

Strong regulation, through the establishment and maintenance of an appropriate regulatory framework of the Australian ELICOS sector has also been one of Australia's key features and strengths in attracting learners (English Australia, 2014).

Employment outcomes

Research has found broadly positive employment outcomes for Australian international graduates of higher education and VET courses, with international graduates valued over their local counterparts for their perceived critical thinking skills, life experience, and English proficiency (AEI, 2010).

However, Deakin University (2014) found that there were still many challenges faced by international students in the work market. In particular, limited local networks, lack of knowledge of the Australian labour market, poor understanding of the job application process and weak communication skills, are found to be barriers for international students in gaining work experience.

2. Overall study experience

Safety and community attitude

Consultations with industry stakeholders found that Australia is perceived globally as a multicultural country with friendly people.

Work opportunities

The introduction of post-study work rights for all higher education graduates in Australia in 2013, and further broadening of the eligibility criteria in 2015, allows graduates to remain in Australia for two to four years depending on the degree. The Department of Immigration and Border Protection's (DIBP) research suggests that a large proportion of eligible learners – 80% to 90% – apply for post-study work visa, suggesting its importance to learners.

Post-study work opportunities are currently a competitive advantage Australia holds over global competitors, especially the UK, which eliminated its post-study work programme in 2012 (UK Home Office, 2012). This change was associated with a decline in learner enrolment numbers during 2012 and 2013 in the UK.

3. Proximity

Geographic proximity

Australia has an advantage and is the preferred country for South Asia and South East Asia markets including Bangladesh, India, Indonesia and Malaysia. Australia also has an advantage in Africa, including in Ethiopia, South Africa and Zimbabwe. These are important markets as they have growing 15-29 year old populations, do not currently invest heavily in their education systems.

Shared time zone

Synchronous or live digital education is thought to be linked to greater learner engagement and improved learner outcomes. Asynchronous models of online delivery, while relatively inexpensive, tend to have higher attrition rates.

Cultural and historic ties

Mazzarol and Soutar (2002) found that for learners across a range of Asian markets – including China, India, Taiwan, and Indonesia – the presence of family and friends either living or studying in a country was an important factor influencing choice of country.

Australia's long history of international education can offer additional advantages as it has built up several generations of alumni in the Asia-Pacific region.

4. Strong framework

Pathway system

In 2014, nearly half of all international learners in Australia who commenced a higher education course did so through a pathway from another sector (46%), the most likely being ELICOS (29%). Of the international learners who commenced a VET course in 2014, more than half did so through a pathway from at least one other sector.

Low risk

Australia employs a transparent admissions process for entry into higher education based predominantly on secondary school qualifications, in contrast to rival countries such as the US and UK where learners are evaluated at the discretion of the individual institutions on a variety of factors, including personal statements and references.

Hobson (2014) found that 70% of learners intending to study in Australia applied to two or fewer intuitions, compared with only 40% of learners intending to study in the UK. In comparison, only 7% applied to five or more institutions in Australia, while 34% applied to five or more in the UK.

Key conclusions of the Deloitte (2015) report

- Australia's onshore international education sector is forecast to grow from 650,000 enrolments today to 940,000 by 2025 (which equates to a compounding annual growth rate of 3.8 per cent).
- The international education sector's contribution to export earnings is expected to almost double to in excess of $33 billion 2015 to 2025.
- The top eight source markets for onshore international learner enrolments across all sectors in 2025 are expected to be China, India, Vietnam, Thailand, Nepal, Malaysia, Brazil and South Korea. Much of the growth in onshore learner enrolments will be driven by Asia – in particular China, India, Nepal, Vietnam and Thailand.
- Over the period to 2025, the fastest growing sectors in onshore international education are expected to be higher education and VET (in percentage terms). By 2025, these two sectors are expected to account for 72 per cent of all onshore international learner enrolments.
- China is set to remain Australia's largest source market for onshore enrolments in 2025 and is expected to occupy the largest number of higher education, schooling and ELICOS enrolments. The largest number of VET onshore enrolments in 2025 are forecast to come from India (16 per cent), Thailand (eight per cent) and South Korea (seven per cent).

Deloitte. 2015. Growth and Opportunity in Australian International Education. https://www.austrade.gov.au/ArticleDocuments/6722/DAE%20EduWorld%20Austrade%20Report.pdf.aspx

Организации высшего образования в Австралии (еще раз):

- **Australian universities**: each university is set up under its own legislation, accredits its own courses and degrees, does both teaching and research in a range of fields.
- **Australian university of Specialisation**: a self-accrediting university that does teaching and research in a particular field.
- **Overseas universities**: a university set up in a foreign jurisdiction that operates a branch in Australia.
- **Other higher education providers** or HEPs: this includes all HEPs that are not in any of the above categories—a small number accredit their own courses and awards but most are subject to course accreditation by TEQSA.

National Register summary table

The National Register is the authoritative source of information on the status of registered higher education providers in Australia. You can search by provider or course.

Provider category	SAA*	Non-SAA	Total
Higher Education Provider	11	123	134
Australian University	40	0	40
Australian University College	1	0	1
Australian University of Specialisation	1	0	1
Overseas University	1	0	1
Total providers	**54**	**123**	**177**

*SAA = Self-accrediting Authority (a provider can self-accredit some or all of its courses)

(минимальный срок действия аккредитации – 2 года, типичный срок аккредитации – не более 7 лет)

TESQA. 2020. National Register for Providers and Courses. https://www.teqsa.gov.au/national-register

Категории / аспекты / вопросы, в рамках которых производится аккредитация программ

TESQA. 2020. Renewing registration
https://www.teqsa.gov.au/renewing-registration

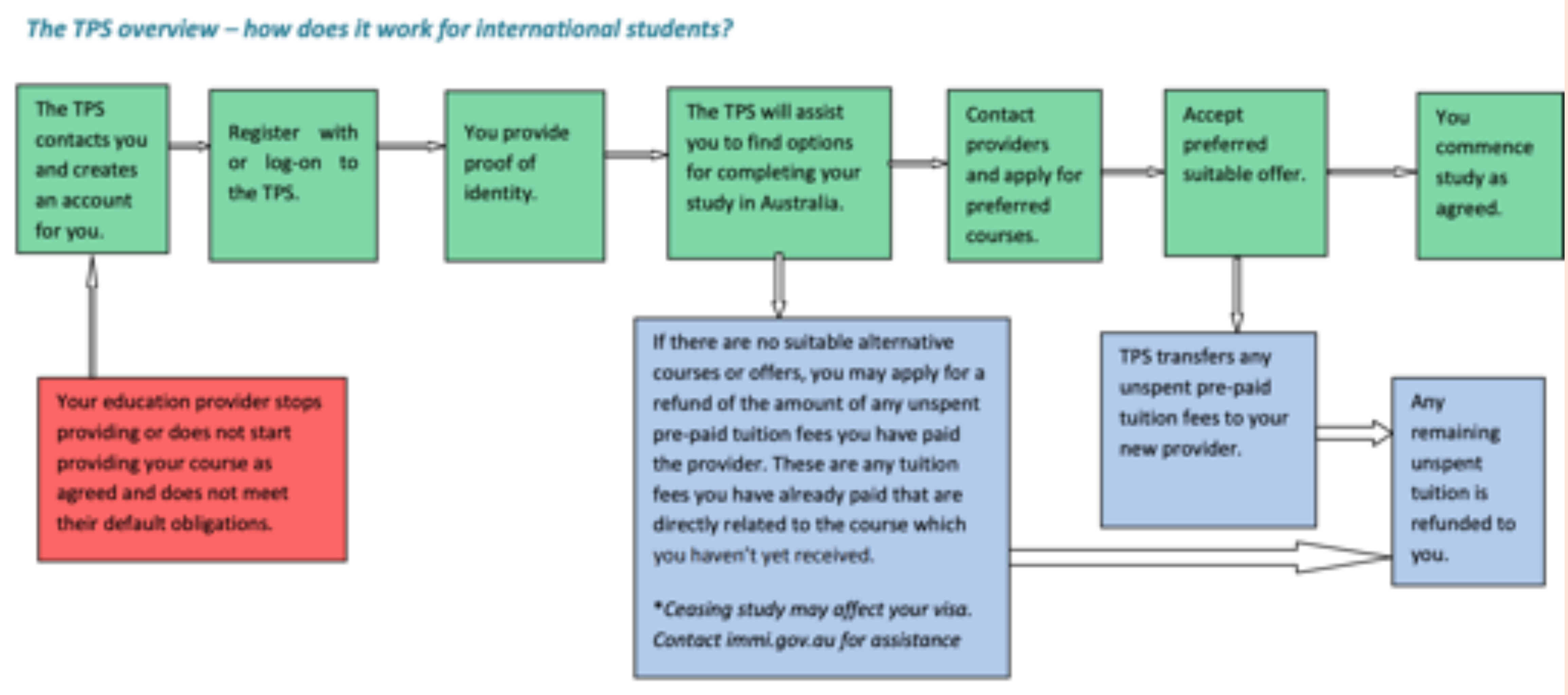
Guidance note	Last updated
Academic Governance	11 October 2017
Academic Integrity	28 March 2019
Academic Leadership (beta version)	18 June 2019
Academic Quality Assurance	11 October 2017
Changes in a Course of Study that may lead to Accreditation as a New Course	6 March 2017
Corporate Governance	26 August 2019
Course Design (including Learning Outcomes and Assessment)	11 October 2017
Credit and RPL [full title: *Credit and Recognition of Prior Learning*]	15 March 2019
Determining Professional Equivalence – [full title: *Determining Equivalence of Professional Experience and Academic Qualifications*]	11 October 2017
Diversity and Equity	11 October 2017
ELICOS Direct Entry	5 June 2019
External Referencing [full title: *External Referencing (including Benchmarking)*]	16 April 2019
Financial Assessment	11 April 2019
Financial Standing	11 April 2019
Grievance and Complaint Handling	22 February 2019
Joint and Dual Awards	11 October 2017
Monitoring and Analysis of Student Performance (beta version)	6 January 2020
Nested Courses	13 August 2019
Research and Research Training	5 July 2018
Scholarship	12 December 2018
Staffing, Learning Resources and Educational Support	22 November 2017
Technology-Enhanced Learning	11 April 2019
TEQSA and the Australian Qualifications Framework	27 August 2019
Third-Party Arrangements	8 October 2019
Transnational Higher Education - Inbound [full title: *Transnational Higher Education into Australia (including international providers seeking to offer higher education in Australia)*]	11 October 2017
Varying a Period of Registration or Accreditation	26 August 2019
Wellbeing and Safety	8 January 2018
Work-Integrated Learning	11 October 2017
Workforce Planning	3 April 2019

Государственные гарантии иностранным студентам: Education Services for Overseas Students Act

- Specifies requirements which universities and non-university HEIs must meet in order to be legally registered as providers.
- Compels institutions not to engage in 'misleading or deceptive conduct' (and require that they 'refund course money' in circumstances where courses 'do not commence on the agreed starting date'.
- Separate clauses cover cases of student default on payment of course money. These provisions are backed by the ESOS Assurance Fund, to which providers must contribute each year.
- The Fund exists to compensate students in the case of promised courses not being offered, such that 'students are provided with suitable alternative courses, or have their course money refunded if the provider cannot provide the courses that the students have paid for' .
- In addition the Act prescribes a variety of rights and responsibilities for providers, particularly in relation to fund contributions, general enforcement of the Act's terms and conditions, monitoring of providers and sanctions in case of their non-compliance.
- Though students are afforded rights as consumers of 'quality' education under the Act, it is the code accompanying the ESOS Act which specifies the substance of these rights. It addresses quality and the reputation of Australia's education system indirectly by imposing 'nationally consistent standards for the conduct of registered providers and the registration of their courses', and by providing 'student welfare and support services' and 'nationally consistent standards for dealing with student complaints and appeals'

Gaby Ramia (2017) Higher education institutions and the administration of international student rights: a law and policy analysis, Studies in Higher Education, 42:5, 911-924, DOI: 10.1080/03075079.2017.1293878

Tuition Protection Service



Tuition Protection Service – International. 2020. https://tps.gov.au/Home/NotLoggedIn

- Where students are over 18 the requirements prescribing mainly that they must provide access to support services and orientation programmes, with student access being given to institution staff who assess and administer these. In addition institutions must have ‘critical incident policies’ in place for all students, with a critical incident defined under the Code as ‘a traumatic event, or the threat of such (within or outside Australia), which causes extreme stress, fear or injury’
- Though the ESOS Framework contains a wide array of detailed provisions, institutions generally do not face stringent legal enforcement on the question of student appeals to academic and other decisions. Institutions are required only to offer students ‘internal’ processes for handling complaints and appeals. Where independent mechanisms – that is, an independent third party or tribunal outside of the student-institution relationship – are requested by a student and the student is enrolled in a public institution, these mechanisms are appointed by the institution and not by the student (Standard 8). The situation is a little different for schools and private vocational education and training colleges and private universities because in those sectors students have access to an Overseas Student Ombudsman (OSU).
- University students do have access to the relevant State Ombudsman, though there is no specific section of that body dealing with students.

Gaby Ramia (2017) Higher education institutions and the administration of international student rights: a law and policy analysis, Studies in Higher Education, 42:5, 911-924, DOI: 10.1080/03075079.2017.1293878

Динамика числа обращений иностранных студентов к омбудсменам

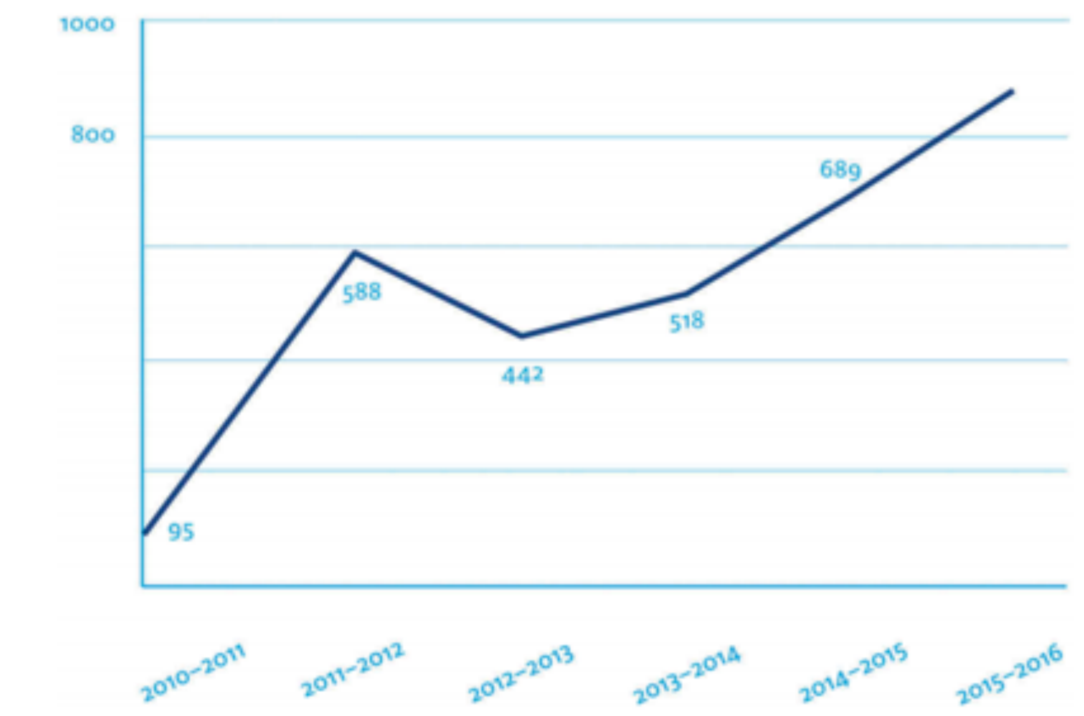


Figure 1. Overseas students ombudsman complaints received per year.

Source: Overseas Students Ombudsman Report 2015–2016https://www.ombudsman.gov.au/__../Overseas-Students-Ombudsman-Annual-Report..

- Chris Nyland & Ly Thi Tran (2020) The consumer rights of international students in the Australian vocational education and training sector, Journal of Vocational Education & Training, 72:1, 71-87, DOI: 10.1080/13636820.2019.1597758

- In February 2010 changes were made to the ESOS Act, reflected in the ESOS Amendment (Re-registration of Providers and Other Measures) Act (ESOS Amendment 2010). These changes were mainly designed to protect and enhance international perceptions of Australia's educational reputation, while also constraining the aggregate supply of student visas, though the latter restrictions were later loosened significantly after a Strategic Review of the Student Visa Program (Knight 2011).
- Under the ESOS changes, all institutions registered under the Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS) had to undergo re-registration by the end of the calendar year 2010. This was to ensure that the right to be an education provider on an ongoing basis was only given to reputable providers. There were other new registration requirements:
  - The primary purpose of the provider had to be shown to be education and not any other business
  - The provider had to demonstrate the capacity to provide education of a standard deemed to be of sufficient quality
  - Institutions had to provide a list of the education agents who represented them and promoted their services to prospective international students.
- These requirements responded to a growing awareness of vocational education colleges that were substandard in quality or working in areas of marginal need, and operating primarily as routes into migration rather than training institutions. In changes as part of the same package, mainly relating to consumer protection, the definition of 'suitable alternative course' – which applied when students were forced by provider closure to withdraw from the course – had to be further clarified by the institution. There was also a requirement that the provider furnish the ESOS Assurance Manager with a report, within 60 days of provider closure, of the number of students affected by closure and the amount of money claimed from the Assurance Fund (Knight 2011).

Gaby Ramia (2017) Higher education institutions and the administration of international student rights: a law and policy analysis, Studies in Higher Education, 42:5, 911-924, DOI: 10.1080/03075079.2017.1293878

Выводы

- Поступления от иностранных студентов – важная часть доходного бюджета ведущих вузов страны, однако относительная величина сектора образовательного туризма в национальном экспорте – спорный вопрос
- «Поворот на восток» австралийских вузов вызван резкой отменой 10-летней политики бесплатного образования в середине 1980-х
- Успех «поворота» как минимум отчасти основан на 30-летней политике культурного сближения и финансирования обучения студентов из стран Asia-Pacific (см. Colombo Plan)
- Грантовые и стипендиальные программы, хотя и продолжаются до сих пор, обеспечивают очень незначительную часть входящей мобильности
- Иностранные студенты обладают дополнительными, в том числе финансовыми, гарантиями со стороны государства
- К вузам, выходящим на рынок экспорта образования, предъявляются повышенные требования

THANK YOU!