



Opportunities in the Australia-India International Education Relationship

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Foreword

The Australia India relationship continues to grow from strength to strength. 2023 has already seen the Prime Ministers of both nations make respective visits to one another, with the topic of education featuring at the forefront of their discussions.

Australia and India first established diplomatic relations during India's pre-independence period, when the Consulate General of India was first opened as a Trade Office in Sydney in 1941. From there, Australia's first High Commissioner to India was appointed in March of 1944, and India's first High Commissioner to Australia arrived in Canberra in 1945.

Today the future of Australia is inextricably connected to India. S&P Global and Morgan Stanley have predicted that by 2030 India will be the third largest economy in the world, and Australia has placed India at the forefront of its international partnerships. Both governments recognise there is significant potential for further cooperation across a broad range of areas.

A testament to the friendship shared between Australia and India is the Quad. Established in 2007, the Quad is a diplomatic network of four countries, Australia, India, Japan, and the United States (US), that are committed to supporting an inclusive, resilient, and prosperous Indo-Pacific.



Mr Chris Mooney
Chairman, AICC

In May 2023, the leaders of the Quad nations came together and issued a Joint Statement and Vision reaffirming their shared commitment to advancing the Quad's positive and practical agenda, and building on progress made to address health security, climate change, critical and emerging technology, space, infrastructure, and cyber.

Underlying all of the Quad's key focus areas is education. Today, Australia is unique among India's education partners as it has a ministerial lead policy forum called the Australia India Education Council (AIEC). The AIEC provides a platform for ministerial engagement on policy and operational issues across education and is co-chaired by education ministers from both countries. The Council meets in conjunction with the annual Australia-India Ministerial Dialogue on Education Cooperation and is supported by the Australia-India Joint Working Group. This group, which also comprises of senior government officials from both countries, meets annually to discuss policy changes and future direction for the two countries.

At the Australia India Chamber of Commerce (AICC) we understand that our strength lies within our engaged and active membership. One of the best demonstrations of this is through the work of our National Industry



Mr Tully Smith
Chief Executive Officer, AICC

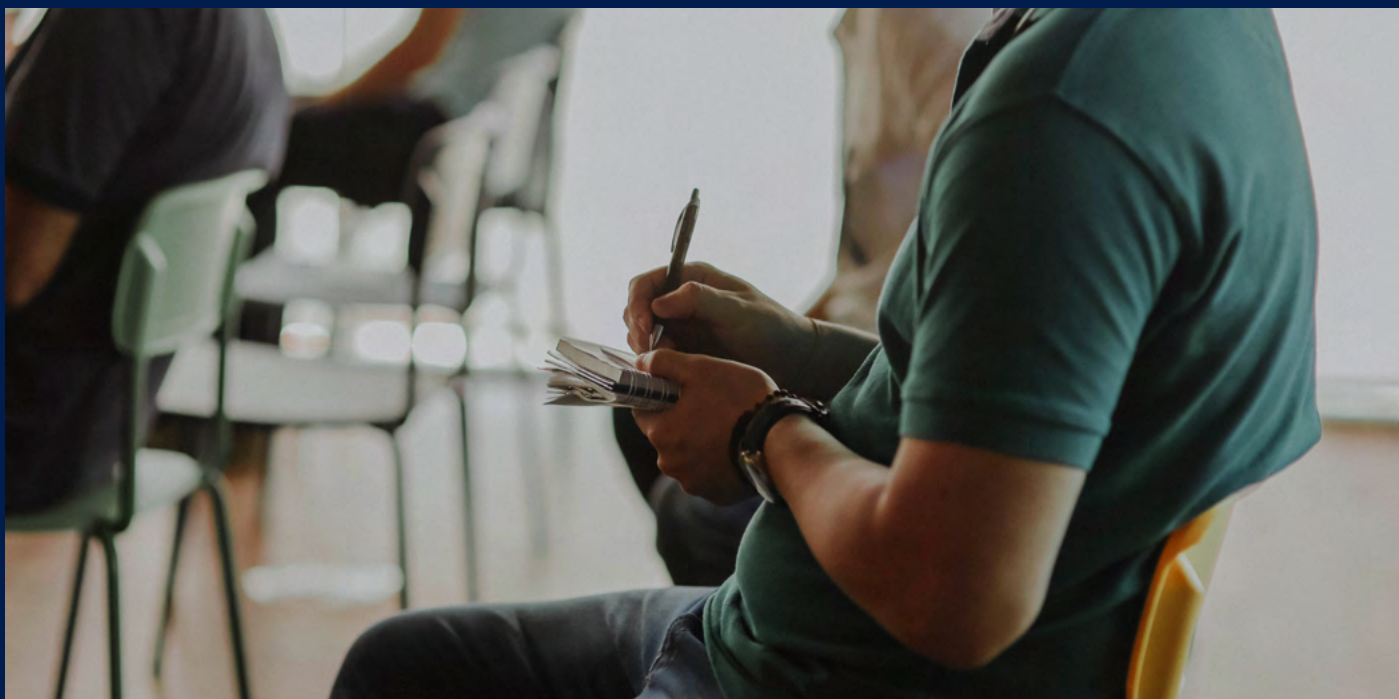
Groups. It is via these groups that we seek to harness the knowledge, skills, and capabilities of our collective membership. This report is an output of one such group, our Education National Industry Group.

Via the broad networks of the AICC, and through our members and partners, we look forward to this paper contributing to the national discussion and the advancement of the Australia India bilateral relationship. However, with expanded economic opportunity comes new actors across a range of sectors, and so at the chamber we believe that all such reports are never truly complete, but nevertheless, are essential to informing and contributing to current conversations.

The chamber is proud to deliver this white paper; Opportunities in the Australia-India International Education Relationship, made possible by our members Strategic Project Partners and the Australia India Institute, as well as report partner the Australia India Youth Dialogue.

We would like to thank Ben Apted, The Hon. Lisa Singh, Dr Andrew Deuchar, and Rebecca Forgasz for their incredible efforts, as well as the members of the AICC Education National Industry Group and all the AICC member organisations that contributed to the creation of this report.

Introduction



In late 2021, as the international education sector was looking to recover from the impacts of COVID-19, SPP partnered with the Australia India Chamber of Commerce (AICC), the Australia India Institute (AII) and Australia India Youth Dialogue (AIYD), to convene a three-part workshop series to understand and explore opportunities and challenges for the growth of the Australia-India education relationship.

Held between December 2021 and August 2022, the series brought together representatives from universities, industry, and government to explore current and emerging trends in these sectors, and explored a number of interconnected themes.

This paper presents the key insights that emerged from the workshop series, all of which remain relevant to the Australia-India bilateral relationship within the higher education context.

Key highlights

- India is Australia's second largest market for international education. However, there remain significant untapped opportunities to further develop this relationship.
- It is essential that Australia and India jointly and reciprocally recognise each others' vocational skills and qualifications, prior learning and clinical education and accreditation in order to maximise student mobility and employability.
- There is strong demand in India for Australian vocational training and education. However, there are significant financial and other systemic barriers to off-shore study.
- There is an opportunity to develop "twinning" initiatives, whereby Australian education and qualifications are delivered on-shore in India, and partnerships with Australian employers provide pathways to employment and potential migration.
- Despite the undisputed value and opportunities of online education and engagement, face-to-face learning and experiences remain integral to a quality student experience.

Themes of the workshop series

Workshop One

2 December 2021 (online)

- Student welfare and the wellbeing of international students
- The future of online learning
- Future opportunities for research collaborations

Workshop Two

17 March 2022 (online)

- Understanding opportunities for university and industry engagement
- What is currently being done to support university and industry partnerships

Workshop Three

**29 August 2022
(face-to-face at Melbourne Park,
as part of a Business Forum
coordinated by AICC with
support DFAT)**

- Student mobility
- Education technology
- Workforce training and development

Context of the workshop series



“International students were especially vulnerable to the social and economic impacts of the pandemic, while border closures meant that revenue to the sector was decimated.”

The workshop series came at a watershed moment for international education and the bilateral ties between Australia and India. The COVID-19 pandemic had a devastating impact on the international education sector in Australia. International students were especially vulnerable to the social and economic impacts of the pandemic, while border closures meant that revenue to the sector was decimated.

As the most acute effects of the pandemic began to subside, a number of policy measures and initiatives have sought to recover and reimagine the aims and opportunities of the international education sector, as well as broader bilateral trade and cooperation.

In 2021, the Australian Government released its Australian Strategy for International Education 2021-2030, charting new directions for the sector. The strategy highlights the importance of placing students' needs at the

centre of international education and identifies the need to attract students from a diversity of countries. It creates newfound scope for Australia and India to build a stronger working relationship with the aim of benefitting students.

These aims align with much of India's National Education Policy, launched in 2020, which emphasise the demand for collaboration between higher education providers within and beyond India.

Broader policy measures also provide support for these education initiatives and exemplify the strength of the relationship between Australia and India. In December 2022, the Australia-India Economic Cooperation and Trade Agreement came into force, setting a path for consolidating ties and fostering economic growth.

Together, these initiatives create a springboard for Australia and India to pursue opportunities for collaboration and engagement in education.

Key insights from the workshop series

Student mobility

India is Australia's second largest market for international education and training. Participants in the workshop series agreed that education agents in India clearly do an excellent job of driving awareness about Australian education institutions. However, there is scope to do more.

At present, most Indian students still consider going to the USA or UK before coming to Australia. There are also emerging competitors such as France, which is complicating established pathways. Australian institutions could expand their market share by focusing on recruiting more undergraduate students from India. One way this could be done is by mobilising Australian Indian community ambassadors to promote the mutual benefits of higher education in Australia and India. These efforts would be strengthened by offering more scholarships at the undergraduate level. Consolidating pathways from undergraduate to postgraduate study, and from postgraduate study into relevant employment, would also strengthen the value proposition for prospective students.

Indeed, post-study work rights and migration pathways remain an important issue for Indian students, as for all international students in Australia. There have recently been some welcome changes in this area, but there remains uncertainty about how long Indian students can stay in Australia once they graduate. This is especially important given the increasing number of Indian

students taking out loans to study in Australia. These students need to have confidence that they will be able to find work related to their degrees upon graduation to meet their loan liabilities.

One way of addressing these concerns would be developing more flexible visa options for students, in particular visas that make it easier to study and work in multiple locations for varying degrees of time. These will also be important as institutions form partnerships that encourage exchange and mobility, or that aim to award joint degrees from Australian and Indian institutions. Another issue that must be addressed in this regard is visa wait times. It was noted that current wait times can be up to two years, and that this is clearly a disincentive for students to come to Australia over competitor nations.

Working in Australia for international students is not just a visa issue: there is also some reluctance among employers to employ international students. Building 'bridges' between education providers and workplaces would help to address this. Traineeships and internships could be built into university courses so that these connections are established during the course of study. This would build confidence among both parties that there is a productive fit between a given candidate and corresponding employment opportunities. Opportunities for gainful part-time work would also enable international students to demonstrate and learn important transferrable skills. Acquiring work experience and reliable references in Australia would help

potential employers assess whether a given candidate is a suitable fit for their enterprise. There may also be a need for a communication campaign to address perceptions in India that Australia is anti-immigration.

On the other side of the bilateral relationship, there is also an issue with recognition of Australian in India. At present, the Indian government does not recognise degrees issued by some institutions and courses in Australia, and this limits options for Indian students if they return home. This issue is currently being reviewed by the Indian government, with changes eagerly anticipated at the time of writing.

All efforts to attract and retain Indian students will be further enhanced by supporting the wellbeing of international students. The COVID-19 pandemic drew attention to the vital need to adequately care for international students. There are perceptions among Indian students that Australian states do this with varying degrees of success (Victoria has a stronger reputation than other states). Consistency and commitments to student welfare across states would be important for fostering wellbeing and for aiding sector recovery and growth.

Workforce training and development

There is strong demand in India for Australian training and development particularly in the areas of healthcare, financial services and teaching. However, workshop participants observed that there are systemic barriers to student recruitment and workforce training in some sectors. In healthcare, for example, industry placements are required in order to receive accreditation, but there are simply not enough industry placement spots to accommodate large numbers of international students.

It was also noted in the workshops that cross border programs and skill development initiatives can be expensive to run because of compliance costs, especially for TVET institutions and providers.

This is a challenge for the India-Australia education relationship because the Indian market is quite price sensitive. The problem has been compounded recently because of how the COVID-19 pandemic has affected funding. Institutions are more inclined to put funding into existing initiatives and have less resources for strategy and business development.

Opportunities to mitigate these financial issues were discussed in the workshops. It was suggested that offshore delivery expenses could be reduced by “train the trainer” models whereby Indian delivery partners are skilled to deliver programs in their own country. There is also an opportunity for workplace training and development initiatives to

increase their focus on professional development market in the corporate sector (eg financial services), which is less price sensitive and is well developed in India.

Issues regarding visas and work rights (discussed above) were also raised in the context of vocational education and training. There was a suggestion that a ‘consortium’ approach could be considered, whereby education providers, industry and government collaborate to develop post-certification employment and migration pathways.



There is strong demand in India for Australian training and development.

The future of online learning and engagement

Setting the context for this topic, SPP Partner Bruce Bayley made a presentation about the challenges and changes that emerged in online learning during the COVID-19 pandemic. He also shared research undertaken by SPP into key trends in the sector (see Exhibit 1). His presentation was followed by a discussion with workshop participants regarding online learning and its challenges.

There was broad agreement among participants that online learning works more effectively for theoretical courses than practical courses in which hands-on learning is required. Teaching and learning online also posed social challenges: it is more difficult to foster connections between students, and teaching across time-zones presents challenges. Recorded lectures address this latter issue in part but limit

opportunities for student engagement. Moreover, there is no guarantee off-shore students have access to the same resources such as access to devices and internet services compared to on-shore students.




There are emerging opportunities for collaboration between Australian and Indian universities via regional hubs, where theoretical components are delivered online but practical elements are delivered face-to-face in the physical hubs.

Discussions about the relative merits of online and face-to-face engagement also took place in a workshop session about student welfare and wellbeing, which remains a key issue for international students. The online activity of student clubs during COVID-19 was mentioned as a positive example of online engagement to support international student

wellbeing and the maintenance of connections to students off-shore. It was noted that there is further scope to use digital engagement and online mentoring communities beyond university to support students in finding employment. As discussed throughout this paper, industry experience and innovation programs are especially helpful for students to seek out job opportunities as well as build social connections.




Despite the undisputed value of digital engagement, there was agreement among workshop participants that education institutions should not overlook the importance of face-to-face initiatives, particularly in view of the “virtual fatigue” students experienced during prolonged online study during COVID-19 (see Exhibit 2).

Exhibit 1 - A new learner segment is emerging, wanting easy access to content aimed at addressing specific skill gaps

<h2>Learner profile</h2> 	<h2>Key preferences</h2> 	<h2>Key outcomes for learners</h2> 
<ul style="list-style-type: none"> • Mid-career (25-45 year age group) professionals with a desire to add new skills to advance or switch their careers • Often time-poor, balancing full time job and completing studies in spare time • More likely to be selective on content from reputable institutions and/or corporates • More price sensitive, fees are more likely to be out of personal expenses • Typical learners have attained a minimum bachelors degree and seeking to expand their knowledge in new areas 	<ul style="list-style-type: none"> • More likely to choose an online program or certificate with institutions that are geographically closer and/or relevant. • Prefers certificates from reputable institutions, recognised by industries (e.g. Xero recognised certificate) • Prefer shorter duration, easy access and flexible delivery methods. Online or hybrid delivery model preferred. • Prefers courses that are structured with emphasis on peer-to-peer learning and facilitated by appropriately qualified professionals, with clear learning outcomes. 	<ul style="list-style-type: none"> • Credentials need to eventuate in tangible career benefits (e.g. salary increases, new role or promotion) • Deliver greater self confidence in own abilities and skills in new areas, able to engage in new knowledge domains • Credentials and knowledge obtained are transferrable across roles (i.e. supports transition into new careers)

Source: “When worlds collide: convergence of international and online education”, Navitas, May 2019, “The emergence of Alternate Credentials”, OECD, March 2020, SPP research 2021

Exhibit 2 - On-shore education and life experience will continue to be highly valued; pure online is a less desirable

 <p>2020 QILT survey highlights student dissatisfaction with online</p>	<ul style="list-style-type: none">• Student experience decreased by 12% with key reasons being expectations not met, health or stress, financial difficulties and lack of academic support• Changes in the student experience have been felt more significantly by younger learners and UG students• 20% of international students considered studying elsewhere, a key factor in this included lack of migration outcomes and graduate job opportunities
 <p>Consultations indicate off-shore on-campus education is not enough</p>	<ul style="list-style-type: none">• International students are dissatisfied with online learning, worse for off-shore students• TNE campuses have not reduced student desire to study on-campus in Australia, leading to deferral or switching out altogether• Students feel tuition fees for online education are disproportionately high to the value of their overall experience• A lack of recognition of online degrees contribute to hesitation
 <p>Navitas Insights reveal strong desire to return on-shore study</p>	<ul style="list-style-type: none">• In 2020, Australia lost attractiveness as a study destination against other countries due to border closures• Superior student experience largely driven by on-shore education, leading students to consider other countries that permit on-shore (e.g. Germany)• Almost 90% of international students suggest they would have no objection to a 14-day quarantine to return on-shore

Source: QILT Student Survey (2020), Expert Consultations by SPP (2021), Navitas Survey Insights (2021)

Education technology

Education technology (EdTech) is increasingly being leveraged at all stages of international education. It is playing a growing role in student recruitment, particularly with assisting students to make destination and course choices. Apps in this space have the potential to expedite and streamline processes related to applications. For example, prospective students can share and verify their identification documents using a smart phone. Because they are able to store this information on an app, they only have to do this once, rather than for each application they submit to an education provider.

Another space where EdTech is being rapidly developed and used is in the space of teaching itself – both in purely online environments and integrated into face-to-face teaching. Education providers across the globe are using

digital technologies to facilitate learning to a much greater extent than has previously been the case. Workshop participants noted that there are Indian institutions, especially private institutions, that are drawing on EdTech very productively, but that there are many barriers to using EdTech at the tertiary level in Australia. EdTech is a disruptive technology and has not been designed with red tape in mind. However, universities are often wrapped in it. This means that partnerships and initiatives sometimes fail to get off the ground.

An example provided by a workshop participant was a university in Australia wanting to partner with an Indian institution and run a course with help from a EdTech company. The Indian institution and EdTech company want the course to be operating within 6 months, but the Australian

institution was not able to commit to anything within the next two years. The partnership consequently fell through. One of the main reasons for failures such as this is that Australian universities have concerns that EdTech companies may not meet their quality assurance standards.

EdTech could also strengthen the dual delivery of programs by Australian and Indian institutions. Recognition of degrees would be supported by EdTech technologies that help graduates store qualifications that are recognised across borders in an 'e-wallet'. This would help to address concerns (discussed in detail above) about student mobility, aiding the movement of students across borders and make it easier for graduates to find suitable employment.

Research collaboration

To introduce the discussion about research collaboration between India and Australia, Dr Andrew Deuchar of the Australia India Institute (All) presented findings of a study led by a colleague, Dr Brigid Freeman, which investigated existing examples of collaboration between the two countries. The study highlighted seven good practices for collaborative research activity:

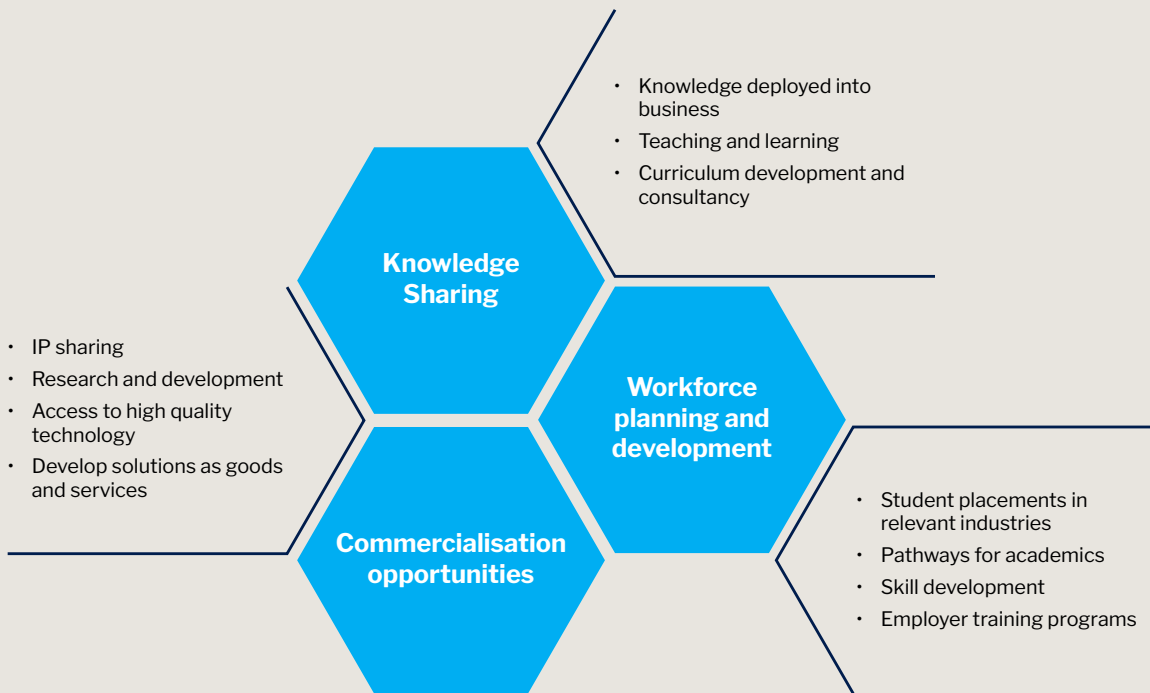
1. Physical mobility, particularly in the early stages
2. A spectrum of research, collaboration and teaching elements
3. A relationship built over time, for the long term
4. A relationship built on mutual interests and complementary capabilities
5. Understanding the diversity of India
6. Harnessing new communication technologies
7. Visibility and consolidation of Australia's research strengths and focus on India

The workshop discussion following Dr Deuchar's presentation highlighted the importance of building trust

between institutions and the need to have inter-country recognition of degrees and capabilities as other necessary conditions to support strong research collaboration. Participants also noted that there were opportunities to target "specialty institutions" to collaborate and connect with researchers, and to establish 'sister' school relationships as an option for engagement diversification.



Exhibit 4 - Three types of engagement lay the foundations for value creation



University and industry engagement

This topic was introduced by SPP Senior Partner Ben Apted, who shared three forms of engagement that lay the foundations for value creation in university-industry collaborations: knowledge sharing, workforce development and commercialisation opportunities (see Exhibit 3). When conducted effectively, these forms of engagement can help leverage the complementary capabilities of universities and industry to form productive and mutually beneficial collaborations (see Exhibit 4).

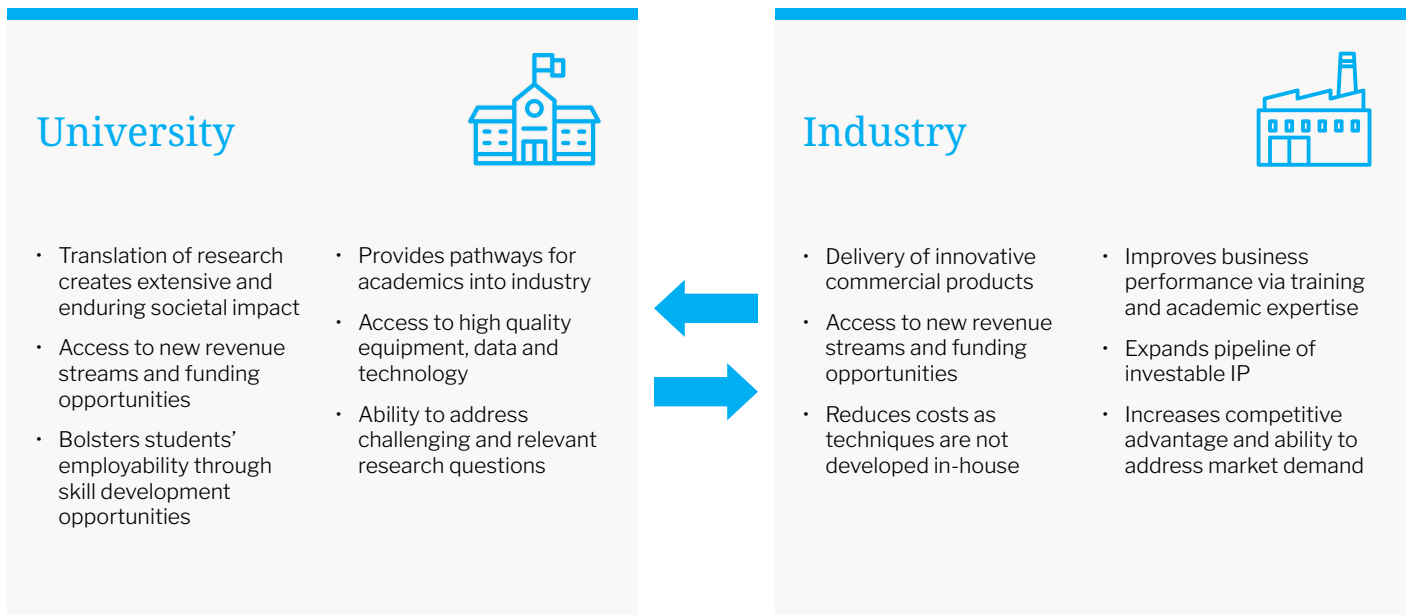
Participants shared several examples of successful university-industry engagement that involved Indian and/or Australian institutions:

- Monash-IITB Research Academy, which has established strong industry engagement. This is attributable to its physical presence in India, and the need to keep up with the pace of market change.
- The collaboration between Tata Institute of Social Sciences (TISS) and Warwick University in the UK. TISS supports several projects and has invested significantly in the UK system with a focus on research in automation. Warwick has also carried out education programs for TISS management.

Despite the considerable opportunities available, there are not currently a great number of university-business collaborations between Australia and India. One way these could be stimulated is by encouraging greater connection between students and industry as part of their studies (eg internships). This will have the dual benefit of exposing students to potential employers and giving employers access to quality talent. With suitable training and support, internships can form the foundation of strong ongoing partnerships, as can collaboration workplace training and education programs (discussed in detail above).

Source: SPP analysis

Exhibit 5 - The mutual benefits of university-industry engagement



Source: SPP analysis

SPP Managing Partner Phil Noble added a further dimension to the discussion with a presentation on the ways that government can support partnerships between universities and industry playing the role of either facilitator, investor, promoter or provider. He also shared examples of specific programs and initiatives that the Indian and Australia government have implemented (see Exhibit 5). Workshop participants agreed that government has an important role to play in enabling such collaborations. It was suggested that governments could do more to share detailed strategies and roadmaps at both a national and regional level; this would create clarity on where collaboration opportunities exist. In particular, there is a need for the Australian government to engage more widely with universities regarding their innovation strategy.

Other insights from the workshops included:

- The importance of having a high level government sponsor and support. This was invaluable in helping to fast-track some Monash-IITB projects.
- Australia is in a great position to support the pharmaceutical and MedTech space in India
- The need to streamline and simplify the process for accessing funding. The Australia-India Research Fund, for example, is a great scheme to support collaboration, but the application process is lengthy and complicated.
- Academics may be more likely to become involved in university-industry projects that have a long-term outcome, due to the current academic performance metrics.



“Governments could do more to share detailed strategies and roadmaps at both a national and regional level; this would create clarity on where collaboration opportunities exist.”

Exhibit 6 - The Government of India has launched several initiatives to support international education partnerships

GIFT International Financial Services Centre (IFSC) Initiative	GIFT IFSC Initiative allows world-class foreign universities to operate in GIFT city in Gujarat domestic regulations.
Global Initiative of Academic Network (GIAN)	GIAN is aimed at tapping the talent pool of scientists and entrepreneurs internationally to encourage their engagement with the institutes of Higher Education in India.
Scheme for Promotion of Academic and Research Collaboration (SPARC)	SPARC is aimed at improving the research ecosystem of India's Higher Education Institutions (HEIs) by facilitating academic and research collaborations between Indian and foreign institutions from 28 selected nations.
Internationalisation of Higher Education	University Grant Commission (UGC) has developed guidelines for the 'Internationalisation of Education' to promote international education in India.
External Scholarships	The Government of India provides various scholarships for Indian students to study abroad.

Source: SPP analysis

Conclusion

The AICC, SPP, AII and AIYD are grateful to all stakeholders who participated in these workshops. The workshops generated rich discussion and were an opportunity for stakeholders to share insights and develop new networks.

We view these workshops as an important milestone in the bilateral relationship between Australia and India, and the ongoing effort to foster greater collaboration and engagement in the sphere of education.

We also thank SPP partners Phil Noble, Bruce Bayley, Michelle Goldsmith and David Mackay for facilitating these insightful discussions.

Participating organisations

Asialink Business	Queensland University of Technology
Austrade	RMIT University
Australia India Institute	SEEK
Australian Catholic University	Study Adelaide
Australian Government, Department of Education, Skills and Employment	Study Gold Coast
Australian National University	Swinburne University of Technology
Australian Universities International Directors' Forum	TAFE Directors Australia
BML Munjal University	TAFE NSW
Box Hill Institute	TAFE QLD
Brolga Co	TAFE SA
Carisma Solutions P Ltd	Tasmanian Government
Chisholm	TEQSA
Consulate General of India	Universities Australia
CPC Analytics	University of Adelaide
CQUniversity	University of Melbourne
Deakin University	University of New England
Delhi Public School	University of New South Wales
Educate Online	University of Newcastle
Federation University	University of Queensland
Get Mee Pty Ltd	University of Sydney
Global Study Partners	University of Technology Sydney
Global Victoria	Victoria University
Gordon Institute of TAFE	Victorian Government, Department of Education and Training
Griffith University	Viewbank College
Hardcat	WA Government, Department of Jobs, Tourism, Science and Innovation
Invest Victoria	
La Trobe University	
Macquarie University	
Melbourne City Institute of Education	
Monash University	
Murdoch University	
Myaccountant	
Navitas	
PACE Primus International	

About SPP



Strategic Project Partners is a high impact strategy consulting firm. We support organisations on difficult strategic and operational challenges.

As Australia's leading higher education strategy consulting firm, SPP welcomes the opportunity to work with education, industry and government stakeholders interested in advancing collaboration in this sector on both sides of the Australia-Indian bilateral relationship.

Please reach out to us to discuss how we can help.



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