

Government of South Australia

International Education

VET SECTOR

Development Plan 2017



Government of
South Australia

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“Growing the numbers of international students in South Australia is a priority for the South Australian Government, part of its commitment to the “Knowledge State”. - The Hon Martin Hamilton Smith, South Australian Minister for Investment and Trade.

1. OVERVIEW

The Deloitte Access Economics report July 2016 highlighted that the South Australian Vocational Education and Training (VET) Sector was trailing well behind the national average for growth in numbers and market share.

Consultation with the South Australian VET sector found that although growth was relatively slow compared to the national average, the sector has been able to weather the very turbulent and challenging times of the past decade and has emerged as a group of very professional, resilient and quality focused training institutions. The sector has also seen the entry of a number of national and international players that have all expressed faith in the future of the South Australian market.

The VET sector in general has traditionally been the hardest hit by events and changes in the international student market place with the smaller states, such as South Australia, suffering the most due to the lack of critical student mass. A key factor also appears to be that the visa and regulatory bodies perceive the client base as higher risk, and the credentials of some registered providers viewed as questionable.

“It is understandable that high quality providers are upset at being in any way associated with what has variously (and in some cases, fairly) been described as shonks, crooks and spivs.” - Knight review VET Chapter 7, 30 June 2011.

Some significant events and changes that have affected the VET market have included the Global Economic Financial Crisis 2007/8, Australian education/migration visa reforms 2009/10, post 2010 visa and regulatory changes, high Australian dollar, private institution closures, media coverage of accusations of violence against international students, increased global competition and the accusations of corrupt practices involving the accessing of government training subsidies in the domestic market.

As part of the International Education Action Plan, we are seeking to gain a consensus from the broader VET sector on the major issues impeding growth. Additionally, in order to try and reverse these trends and market misperceptions, we will seek to work collaboratively to identify creative, innovative ways in which to overcome these restraints.

“A challenge which every university (training provider) must address is market-led content rather than supply-led content” - Rob Lawrence, Understanding Generation G, 2014.

2. THE VET CHALLENGE

In most emerging economies, a Secondary School/Bachelor Degree/Master's Degree pathway is perceived as the panacea to a successful future by parent's for their sons and daughters.

This perception, despite the actual reality of the fast paced changing demands of the current employment market, is in part due to the fact that university studies have only been available to the emerging middle class in developing countries in relatively recent times. The parents of the Millennial and Post millennial generations that were denied access to this pathway still covet it as the ticket to success and security in life it once represented.

The Post Millennial, iGeneration is now confronted with a rapidly changing occupation landscape, fashioned by a fast paced, increasingly competitive, technology dominated and globally orientated workforce that will require access to life-long learning resources that are multidimensional, innovative, relative and responsive to ongoing rapid change to maintain a competitive set of work skills relative to emerging industries.

For most international students the differences between the education system of their home country and that of Australia differs significantly and the opportunity of an articulated practical pathway to university does not exist.

This would explain the trend where 62% of VET international students in SA (2015-2016) were enrolled onshore as opposed to 31% for higher education and 7% for schools.¹

Although degree studies are the preferred study pathway, the challenges presented once on-shore to international students (personally, linguistically and culturally) may be too complex to overcome in a university context.

The VET pathway offers these students a range of integrated English classes and entry level courses that enable them to familiarise themselves with the education style and culture of Australia in a more intimate, practical and supportive environment. This in turn empowers them to make better informed decisions about their future skills development, study and career options.

VET is universally recognised as a provider of practical education, emphasising applied work skills and industry-relevant knowledge, not in exclusion of, but complimentary to tertiary studies.

The question we face is, how do we effectively communicate an alternate study pathway that provides real choice, diversity, experiences, skills, capabilities and competencies that delivers enhanced employment competitiveness?

“Eight words reflect the motives of international students in terms of fulfilling their desired outcomes and the way in which they inform their decisions” - Rob Lawrence, Understanding Generation G, 2014

**Portability
Practicalities**

**Flexibility
Experiences**

**Recognition
Opportunities**

**Relevance
Employment**

¹Department of immigration and Border Protection, Student visa grants tables 2015 -2016

3. AUSTRALIAN VET SECTOR

“Compete at scale, embrace borderless learning 24/7, unleash technology, sharpen market focus, attract global capital, maintain an Australian edge” - AIE 2025 National Strategy

NATIONAL TOP 5 VET SOURCE COUNTRIES			SOUTH AUSTRALIAN TOP 5 VET SOURCE COUNTRIES		
2016 commencements			2016 commencements		
NATIONALITY		Growth rate	NATIONALITY		Growth rate
1. INDIA	15,959	-5.1%	INDIA	665	-4.3%
2. KOREA	10,146	11.3%	CHINA	554	31.3%
3. THAILAND	9793	16%	NEPAL	268	387.3%
4. CHINA	8,864	1.8%	HONG KONG	197	3.7%
5. BRAZIL	7,788	41.8%	KOREA	179	9.1%

In major states, growth for government registered training providers has declined into negative growth since the introduction of the Streamlined Student Visa Framework (SSVF). Growth now seems to only be taking place in the minor states of South Australia (9%) and Tasmania (13%), albeit off relatively low bases. (refer appendices)

The international VET market is clearly dominated by the non-government registered providers with double figure growth in all states except New South Wales and Queensland.

The VET sector currently contributes 30% in NSW, 24% in Victoria, 27% in QLD and 32% in WA to the total number of international student enrolments in those states. In the smaller states the percentage drops dramatically to 15% in SA and 8% in Tas. (refer appendices)

Business, Management and Commerce related courses are by far the most popular courses across all markets. *Food, Hospitality and Personal Services* related courses feature as strong areas of interest in all major source countries. *Information Technology* and *Health Sciences* related courses maintain a moderate market share.

“The education sector of 2025 will be enabled and characterised by its spirit of collaboration, innovation, anticipation and reciprocity” - AIE 2025 National Strategy

4. SOUTH AUSTRALIAN VET SECTOR

2016 INTERNATIONAL STUDENT VET SECTOR DATA						
South Australian	Enrolments			Commencements		
Provider Type	2015	2016	Growth	2015	2016	Growth
Government	704	818	16%	480	521	9%
Non-Government	4077	4521	11%	2127	2593	22%
Grand Total	4781	5339	12%	2607	3114	19%

VET in SA is currently growing at 12% enrolments and 19% for commencements.

The largest growth appeared in the non-government sector. Government sector grew by 9% to 521 commencements while the non-government sector grew by 22% to 2593.

TOP 5 GROWTH MARKETS IN 2016 INTERNATIONAL STUDENT VET SECTOR DATA							
Government (TAFE SA)	Commencements			Non-government	Commencements		
Nationality	2015	2016	Growth Rate	Nationality	2015	2016	Growth Rate
Vietnam	62	86	39%	China	385	503	23%
China	37	50	35%	Nepal	49	262	81%
Malaysia	28	41	46%	Kenya	95	174	45%
Hong Kong	18	22	22%	Taiwan	56	110	49%
France	4	11	175%	Malaysia	44	60	27%
Thailand	7	11	57%	Thailand	16	28	43%

Major commencements growth occurred in Nepal 268 students (387%), Kenya 179 students (83%), Taiwan 127 students (74%), Thailand 40 students (74%), Malaysia 100 (39%) and China 554 (31%). Growth in Vietnam has stagnated nationally under SSVF (-4%), while South Australia has bucked the trend with a growth rate at 17% (138 commencements).

Brazil is a leading market on a national level ranking number 5 with a 42% increase to 7788. South Australia performs poorly this market with only 4 commencements with 0% growth.

Non-government providers grew strongly in Nepal, Kenya, Taiwan and Thailand. The Government (TAFE SA) had strongest growth in Vietnam, China, Malaysia, France and Thailand

Niche markets program areas include aviation, logistics, complimentary therapies, hair and beauty, interpreting and translation and agriculture and horticulture.

“This is a generation which seeks outcomes, whether in the shape of employment outcomes or through the provision of activities designed to stimulate opportunities to shape outcomes”- Rob Lawrence, Understanding Generation G, 2014

5. PROFILES

5.1 Government Provider

TAFE SA is the only government RTO in South Australia with a current CRICOS registered capacity for 2000 international students. It currently represents 17% (525) of commencements growing at a rate of 10%. TAFE SA offers over 150 courses and 50 university pathways packages in 14 different program areas.

TAFE SA offers a number of state of the art specialist campuses:

Adelaide College of the Arts: Offers a purpose-built exhibition space for visual arts integrating specialized studios for ceramics, drawing, jewelry, painting, photography, printmaking, sculpture, game art, CGI and visual effects.

The Mining, Engineering and Transport (MET) Centre: Features a high-bay workshop for heavy transport including dyno facilities for light and heavy vehicles, automotive spray painting and spot repair booths, mining training practice drill rig and drill pad, land information systems survey equipment and computer software, CAD suite, advanced manufacturing 3D scanning and printing facilities and CNC controlled mills, guillotines and plasma cutters. *The Regency International Centre:* Provides world class purpose built specialist training facilities for hospitality industry training.

The Tonsley Park Workshops: Roof plumbing, Carpentry and joinery, Glass and glazing, Electrical trades, Refrigeration and air-conditioning, Bricklaying, Furnishing, Painting and decorating, Plastering –solid and fixing and flushing, Gas installation, Transportable building construction, Oil and Gas, CAD suite, Programmable Logic Controller (PLC) laboratory, Water operations testing laboratory, electro technology computer-aided learning laboratory, CNC woodwork and milling machines and incorporating the Renewable Energy Centre of Excellence and The Onshore Petroleum Centre of Excellence (OPCE).

5.2 Non-government Provider

VET sector in South Australia has 42 non-government Registered Training Organisations RTO's currently listed on the Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS) (see Attachment 2). Currently 4521 (85%) of students are enrolled in with non-government providers. Commencements in the non-government sector are currently growing at approximately 22%.

There are 14 private RTO's offering courses to domestic students, as well as international students including 4 private stand-alone English language centres with a registered capacity of 1,338, 14 colleges that offer English language packaged with award courses (student language capacity is included as part of the total registered capacity for the RTO), 23 private RTO's offering at least one course in the broad field of Business/Management/Commerce, 13 in the broad field of Hospitality, 5 in the broad field of Health Services and 4 Information Technology.

6. SUMMARY OF THE BROAD ISSUES & IDENTIFIED ACTIONS

Issues and Actions have been divided into 7 categories:

- Market Research and Development
- Agent Engagement
- Student Engagement
- Government Support-Government funding and government champion
- Stronger links with industry on and offshore
- Pathways & Packaging
- Visa Regulation & Grant Levels Issues

6.1 Market Research and Development

The VET Sector suffers from a lack of branding and promotion on several levels:

Firstly, the collective credibility of the sector needs to be enhanced through the highlighting and consistent messaging of an alternate study pathway that provides real choice, diversity, experience, skills, capabilities and competencies that deliver enhanced work ready skills, to counteract the effects of negative media coverage and misconceptions of the VET experience.

Although unscrupulous practices were only undertaken by a small minority of providers mainly concentrated in the eastern states and those that were operating in SA have all but moved out due to the enhanced regulatory environment, there still remains some stigma on the credibility of the sector.

Secondly the sector often feels like the “Poor Cousin “of the higher education sector in state priorities and promotions. Most providers acknowledge that the VET sector in SA currently only amounts for approximately 15% of the International student market. If we want it to move ahead and mirror the states of WA, QLD, VIC and NSW where the contribution is 27%+ there is a need for the further the development of a collective promotions strategy.

Smaller RTO’s lack the investment capital to undertake large scale marketing and promotions offshore. A number of the smaller RTO’s also expressed that there are a several peak industry bodies competing for financial membership and it was often difficult to prioritise which provided the best return on investment.

The onshore market currently represents more than 60% of VET Sector enrolments.

Market Research and Development

Actions

1. Develop a more sophisticated marketing strategy that identifies key overseas market segments and identify their needs and preferences for training in Australia.
2. Invest in campaigns to build Agent awareness of the South Australian VET sector and Adelaide e.g. Expos
3. Undertake market research to explore perceptions, decision making and motives for international students choosing vocational education, how it is best termed/ labelled/defined and identify the potential value propositions to enhance and communicate its relevance to overseas students.
4. Explore the opportunity to create a ‘VET Adelaide’ brand
5. Explore possibilities of the formation of provider consortiums to enhance the offerings of smaller providers
6. In the longer term, there should be greater dual branded programs with Universities, but this will require more consultation with higher education providers.

6.2 Agent Engagement

A strong network of experienced, reputable agents committed to the successful promotion of Adelaide as a study destination is crucial to the recruitment of quality students for institutions in the South Australian VET Sector.

Success rates for applications lodged through agents is significantly higher than those lodged by an individual, especially in countries with a high-risk rating. Whereas a smaller capital city will often find it hard to compete against larger Australian and international competitor cities that can afford greater levels of marketing and promotion. In addition to this, competitor cities already have significant advantages, such as the hosting of large scale global profiling events and identification with strong, historically established worldwide icons.

As agents have a presence both locally and overseas, they can champion the message of the advantages of studying in an environment that may differ dramatically from where the student resides. It is also often harder for smaller private providers to get on the radar of the major agents, as they manage large portfolios including institutions from multiple countries with large levels of high turnover counselling staff.

Agent Engagement
Actions
<ol style="list-style-type: none">1. Further foster relationships between RTOs and agents, so the agents are more familiar with the definable benefits of specific training providers.2. Work with agents to engage them in selling the South Australian VET sectors collective strengths and clear value propositions.3. Conduct Adelaide based events for agents to improve the profile of Adelaide and South Australia.4. Explore the opportunities for opening-up new or untapped markets through engaging or attracting agents via marketing incentives or subsidies.

6.3 Student Engagement

Word of mouth is a major marketing tool in the education sector. A number of new initiatives are currently being developed such as the Accommodation Offer Guarantee and Employer Portal. Study Adelaide currently runs a student engagement program aimed at ensuring students have a quality experience during their time in Adelaide. They offer a large range of events hosted throughout the year at discounted rates or free.

Student Engagement
Actions
<ol style="list-style-type: none">1. Establish a Student experience strategy to ensure all stakeholders are part of a comprehensive program of integrating and improving the study and living experience in South Australia for international students2. Establish stronger links with service providers in South Australia e.g. transport, accommodation providers, support bodies, access to effective technologies, etc. to improve the living and study conditions in Adelaide student experience.3. Build community engagement with overseas students, recognising that the first 60 days are crucial when migrating to a new country.

6.4 Government Support and Resourcing

As out lined in the International Education Action Plan: The Department of State Development, International Education Office will co-ordinate budget bid (to support agreed initiatives recommended by Working Group through industry consultation) to promote international Students and report on the progress in the context of the government’s economic policies

Government Support-Government funding and government champion
Actions
<ol style="list-style-type: none">1. Establish a designated advocate or representative within the state government to raise the profile of the vocational sector.2. Establish financial support initiatives to encourage and support growth and expansion in the VET sector reflecting on existing programs currently operating interstate but offering more innovative approaches.

6.5 Stronger links with industry onshore and offshore

One of the key findings of research done into the post-millennial student is that they are very focused on real outcomes, be it employment or initiatives and activities that lead to being more employable. Many intuitions struggle in this area as it is very time consuming for both the institution and the participating industries. Streamlining the process through a collective approach may return economies of scale in dealing with issues such as insurances, business matching, monitoring, assessment and placement support.

Stronger Links with On-Shore and Off-Shore Industry

Actions

1. Establish structures and initiatives to identify job, work experience or internship opportunities in the South Australia or the student's country of origin on completion of training.
2. Build a strong emphasis on communicating the benefits of employing or offering internships to job ready VET graduates.
3. Create a stronger strategic relationship with Government and industry bodies overseas to establish South Australia as a training opportunity of choice.

6.6 Pathways & Packaging

Pathways and packaging agreements with both private and government universities are perceived as crucial to VET providers delivering real career development outcomes to graduates.

A few of the larger, more established providers have developed strong working relationships with higher education providers but still the majority expressed that it is a long, constant, and resource intensive process often delivering modest outcomes. Often providers that don't come from a higher education background find the higher education system a difficult and complex structure to navigate.

Pathways and Packaging

Actions

1. Further investigation is required into opportunities and innovative approaches that encourage greater co-operation and collaboration between the VET and higher education sectors.
2. Create/identify resources that can assist and educate providers to negotiate pathways and packaging agreements with public, private and higher education providers.

6.7 Visa Regulation & Grant Levels Issues

VET has traditionally been the sector hardest hit by the introduction of new visa and regulatory changes. This appears to be because the visa and regulatory bodies perceive the client base as higher risk.

Anecdotally, the sector feels that there has been some inconsistency in the processing of student applications under the newly introduced Simplified Student Visa Framework (SSVF) as the result of the very subjective model adopted through the Genuine Temporary Entrant (GTE) and Statement of Purpose (SOP) assessments. There exists in the sector a need to be able to strengthen the ability to collectively gather and present evidentiary data to effectively lobby for regulatory or legislative reforms.

Visa Regulation and Grant Level Issues

Actions

1. The South Australian VET sector needs to create a strong competitive advantage of the 'regional' status of South Australia with respect to skills and visas. South Australia needs to create a simple message that breaks through the complexity of skills and immigration policy ensuring South Australia as a state develops a reputation for assisting its graduates to have access to the broadest range of opportunities possible for career and personal advancement on completion of their studies.
2. The VET Sector Working Group to explore avenues to open up and strengthen relationships with the Department of Immigration and Border Protection aimed at bolstering the numbers of approved visa applications.
3. The VET Sector Working Group to explore effective ways for the collection of strong evidentiary data and case studies for strengthening the argument on issues emerging of an anecdotal nature.
4. Establish a stronger relationship with other locations of 'regional status' e.g. Tasmania and Northern Territory.

7. PRIORITY MARKETS

“South Australia has a smaller share of the key national markets where demand for VET is likely to originate, such as Thailand, Korea, Brazil and Malaysia”.²

The countries outlined below were prioritised through analysis of the Department of Education 2016 VET Sector International Student Data. (see appendices).

There was discussion at the industry consultation in regards to obvious omissions like China and India but those countries where visa grants offshore were low but higher in-country were considered covered in the Australian or onshore market.

Nepal was discussed but considered high risk by some and a key market by other's.

Given the rapidly changing landscape and volatility of the International student market, country performance can fluctuate due to a broad range of events e.g. visa changes, economic performance, natural disaster, negative media, competitor country policy, political climate etc.

In light of the inability to draw a consensus at the time, we chose to maintain the countries as listed as a guide, noting that at the time of execution of the implementation strategy there will be a review of the current climate at that time.

7.1 Key Markets:

1. Australia
2. Malaysia
3. Taiwan
4. Thailand
5. Vietnam

7.2 Emerging market:

1. Africa
2. Cambodia
3. Myanmar

8. CONCLUSION

The above plan was developed under the auspice of the VET Sector Working Group and authored by the Business Development Officer (VET) of the Department of State Development, International Education office.

The process for development involved one on one interviews with a cross-section of VET Registered Training Providers, the development of a draft plan circulated for general comment and concluding with a public consultation facilitated by an independent co-ordinator.

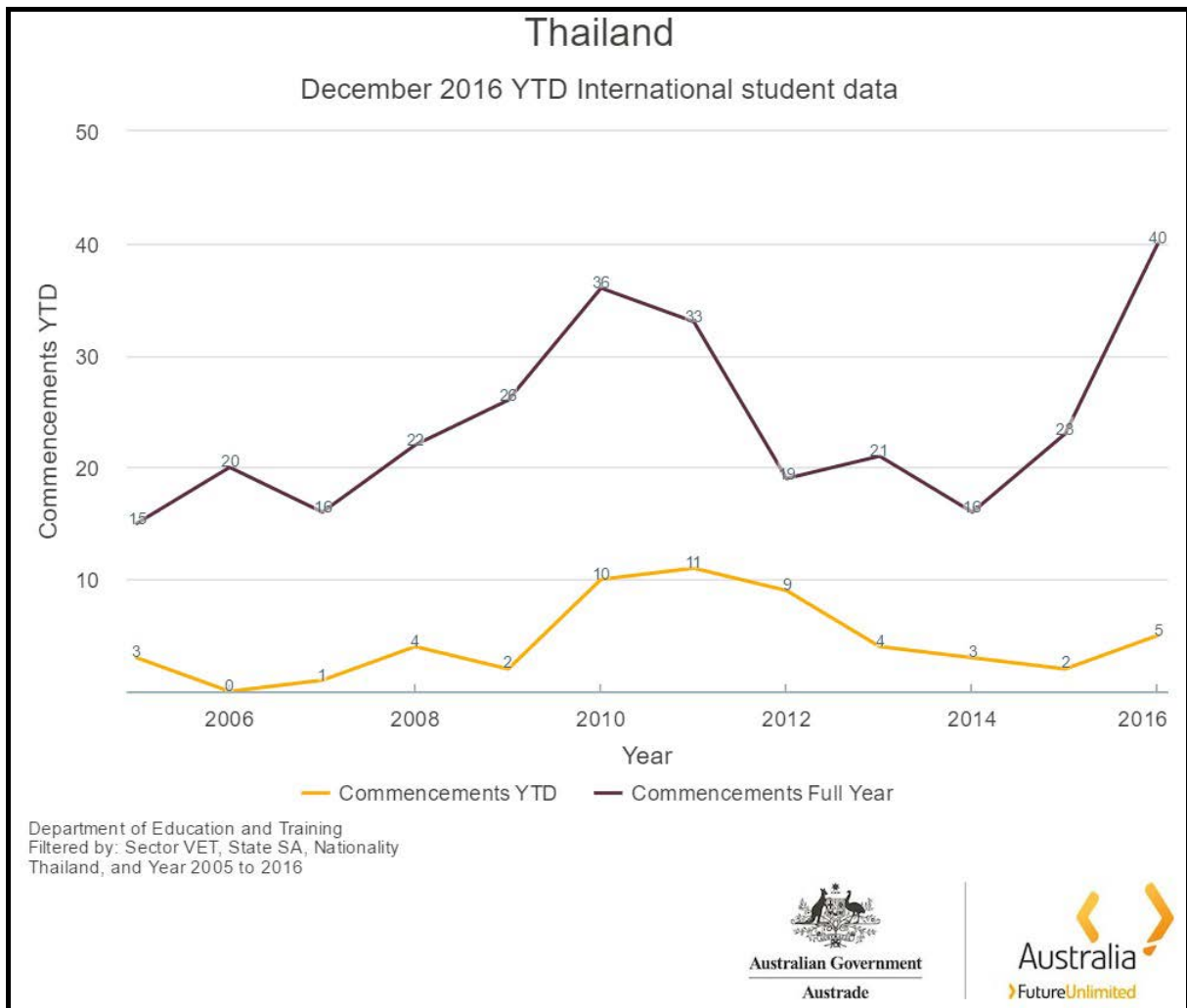
The attached plan will now be followed by an implementation strategy again steered by the VET Sector Working Group, in consultation with the industry via a VET networking forum, under the aegis of the International Education Office.

² Deloitte Access Economics. 2016. *International Education In South Australia*. Adelaide: Deloitte Access Economics, pg 33.

9. ATTACHMENT 1: SOURCE COUNTRIES ³

9.1 Thailand - was ranked 3rd with 9793 commencements nationally with a growth rate of 16% and 13th in SA with 40 commencements and growth rate 74%

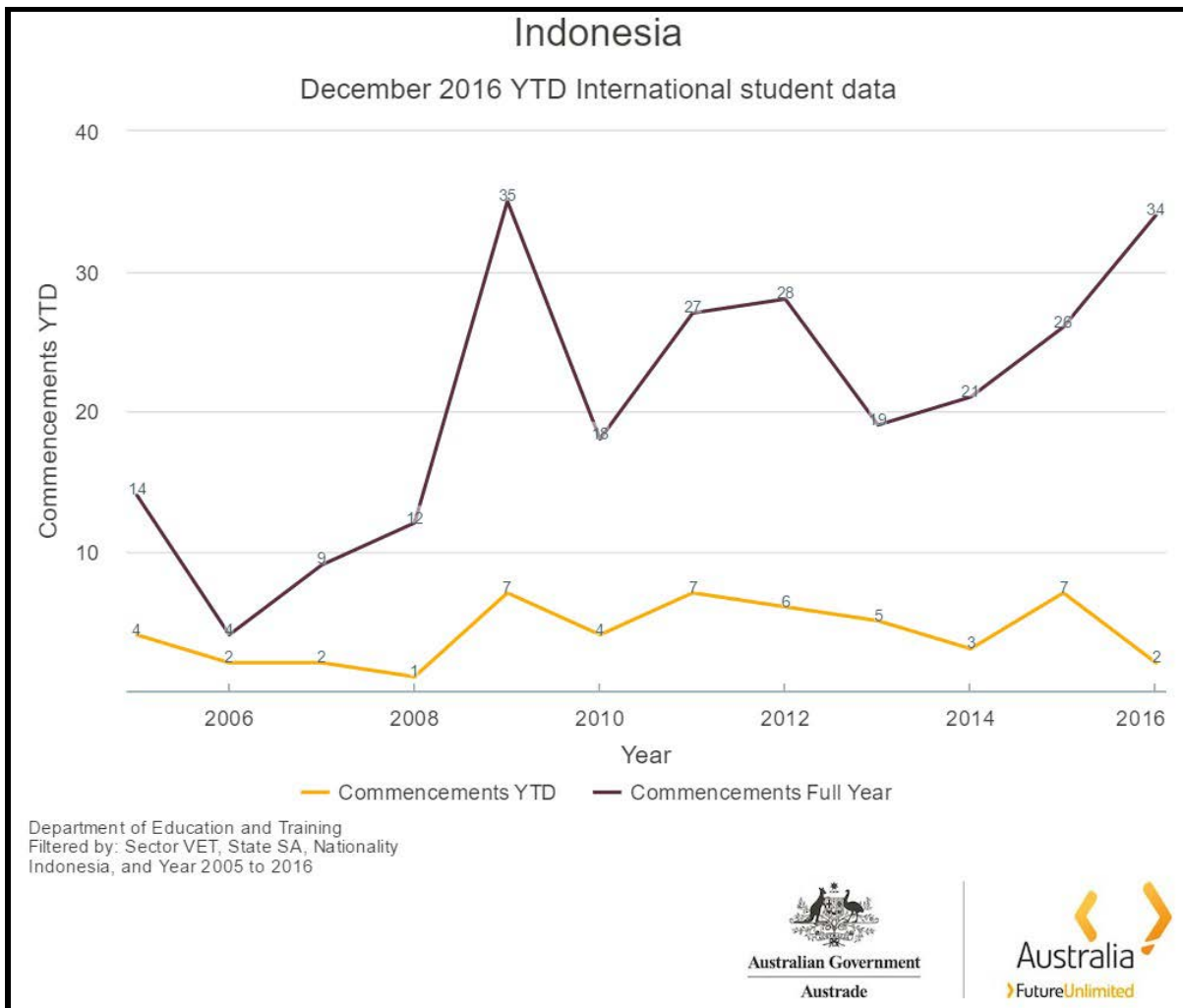
Thailand	Detailed field of study	Enrolments	Commencements
	Food, Hospitality and Personal Services	28	20
	Management and Commerce	22	16
	Society and Culture	2	2
	Engineering and Related Technologies	1	1
	Information Technology	2	1
	Creative Arts	1	0
	Thailand Total	56	40



³ MIP 2016 November YTD student data

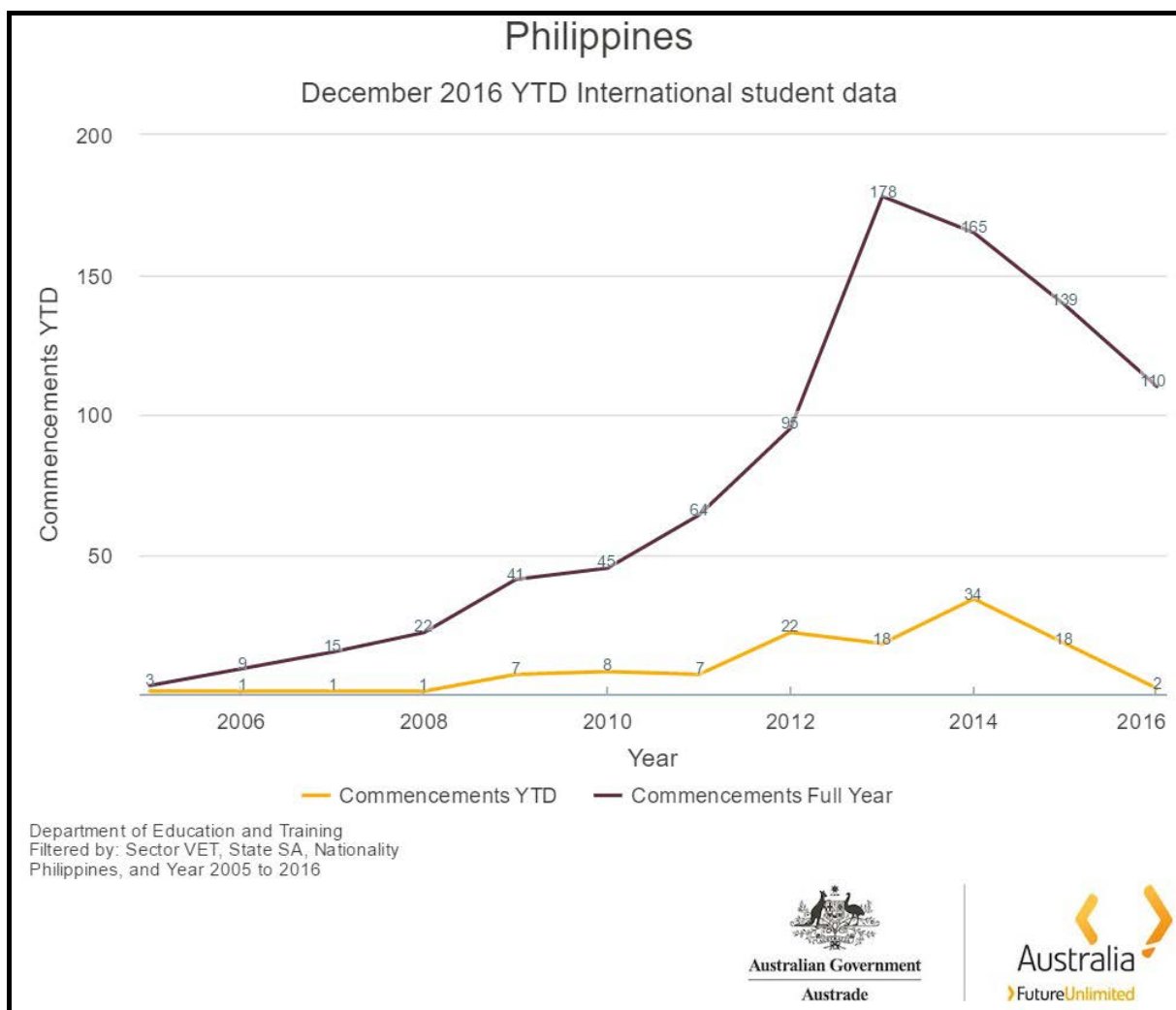
9.2 Indonesia – was ranked 8th with 5191 commencements nationally (current growth rate -2%) and 15th in SA with 34 commencements (current growth rate 31%).

Indonesia	Detailed field of Study	Enrolments	Commencements
	Management and Commerce	16	11
	Food, Hospitality and Personal Services	21	11
	Engineering and Related Technologies	6	5
	Society and Culture	3	3
	Creative Arts	1	1
	Architecture and Building	2	1
	Agriculture, Environmental and Related Studies	1	1
	Health	3	1
	Mixed Field Programmes	1	0
	Total	54	34



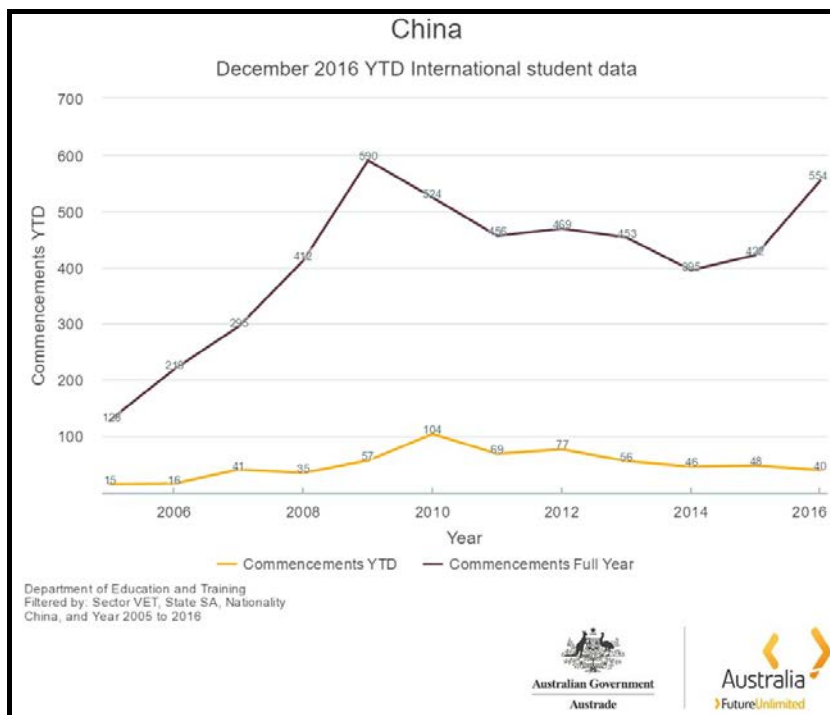
9.3 Philippines – was ranked 11th with 3505 commencements nationally (current growth rate - 5 %) and 9th in SA with 110 commencements (current growth rate - 21%).

Philippines	Detailed field of study	Enrolments	Commencements
Philippines	Management and Commerce	95	39
	Society and Culture	47	33
	Food, Hospitality and Personal Services	37	23
	Health	33	10
	Education	2	2
	Engineering and Related Technologies	5	2
	Information Technology	2	1
	Architecture and Building	2	0
	Natural and Physical Sciences	1	0
	Philippines Total	224	110



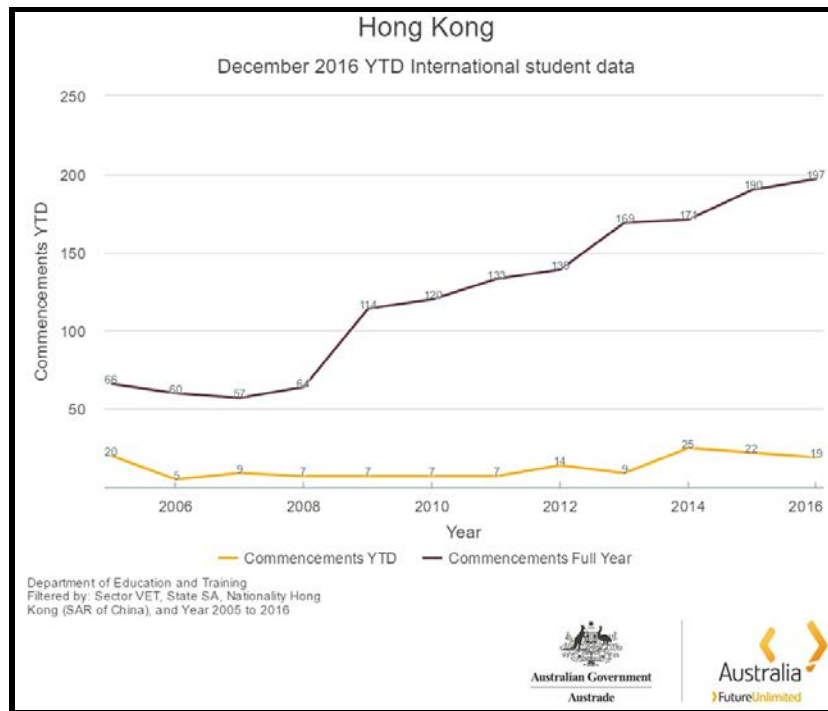
10. OTHER MARKETS⁴

10.1 China - was ranked 4th with 9793 commencements nationally with a growth rate of 16% and 2nd in SA with 554 commencements with a growth rate of 31%.

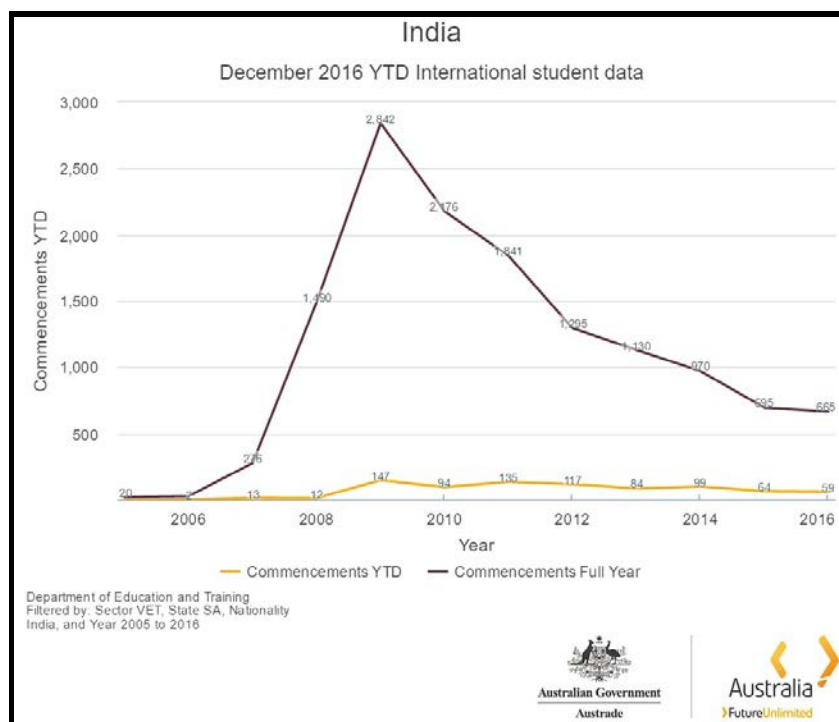


10.2 Hong Kong - was ranked 15th with 2601 commencements nationally with a growth rate - 5% and 9th in SA with 297 commencements with a growth rate of 4%.

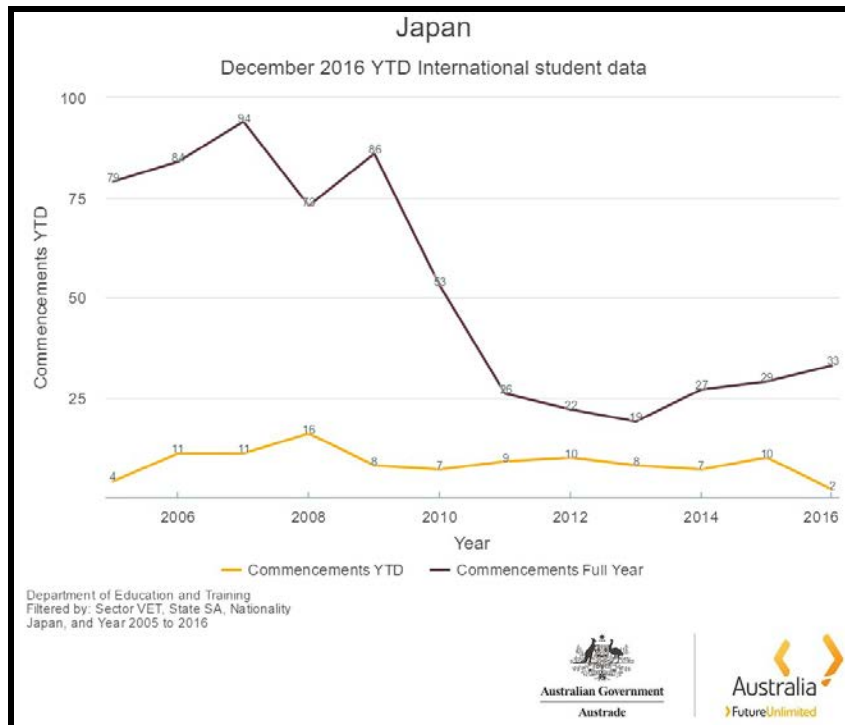
⁴ MIP 2016 November YTD student data



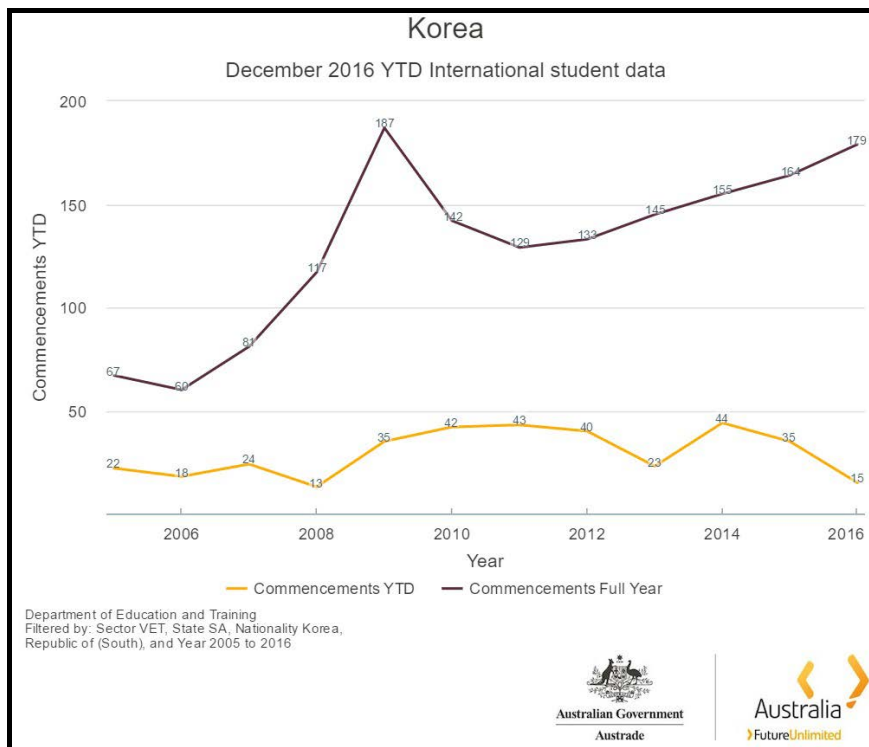
10.3 India - was ranked No.1 with 15959 commencements nationally with a current growth rate - 5.1%) and No.1 in SA with 665 commencements with a growth rate -4.3%).



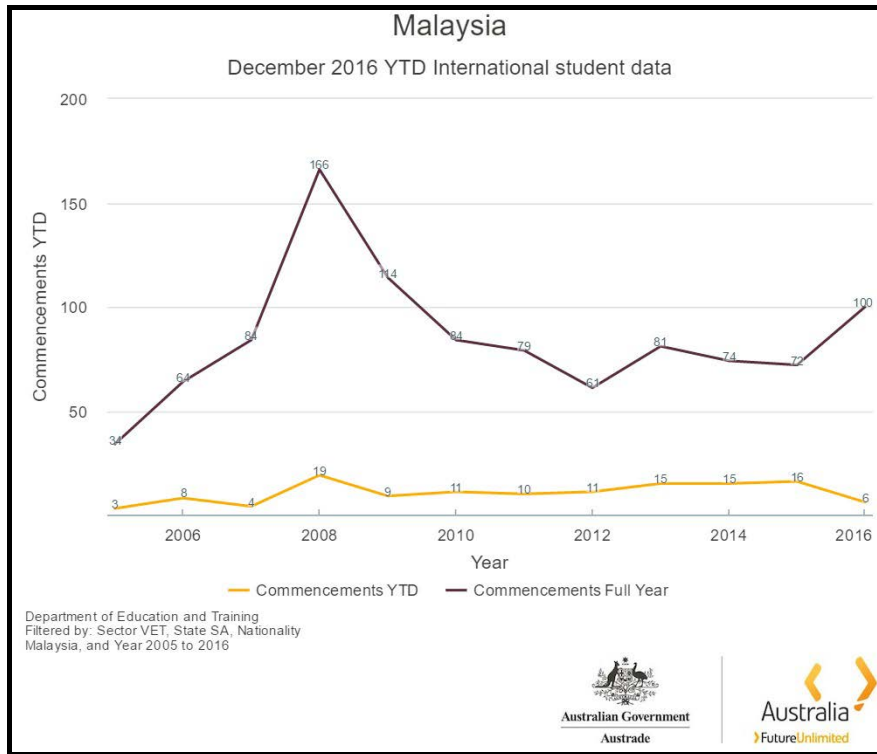
10.4 Japan - was ranked 14th with 2730 commencements nationally with a growth rate 6% and 16th in SA with 33 commencements with a growth rate 14%.



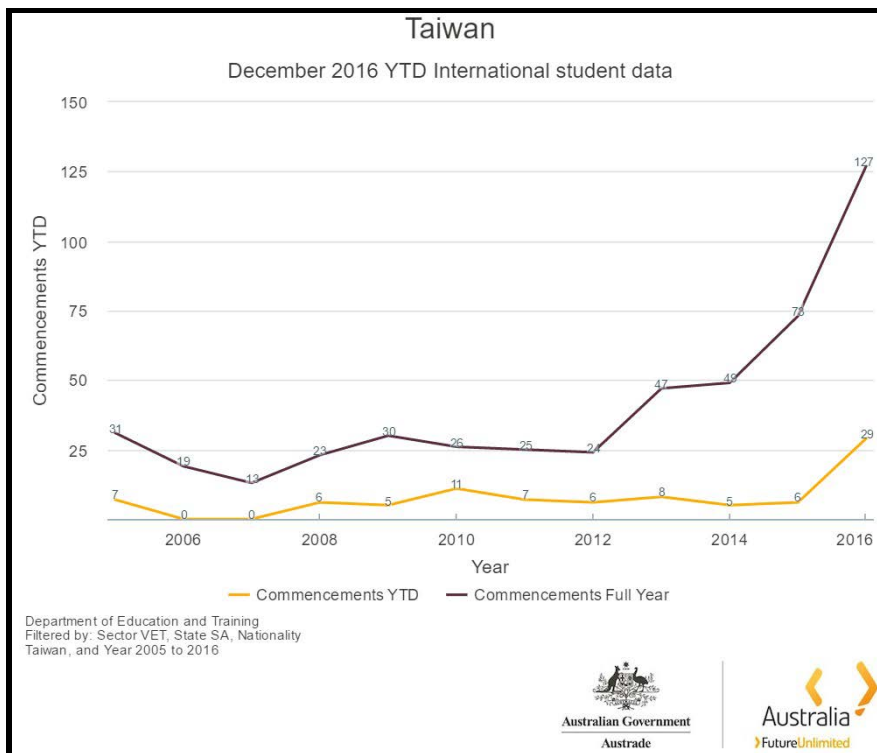
10.5 Korea - was ranked 2nd with 10146 commencements nationally with a growth rate of 11% and 5th in SA with 179 commencements growth rate 9%.



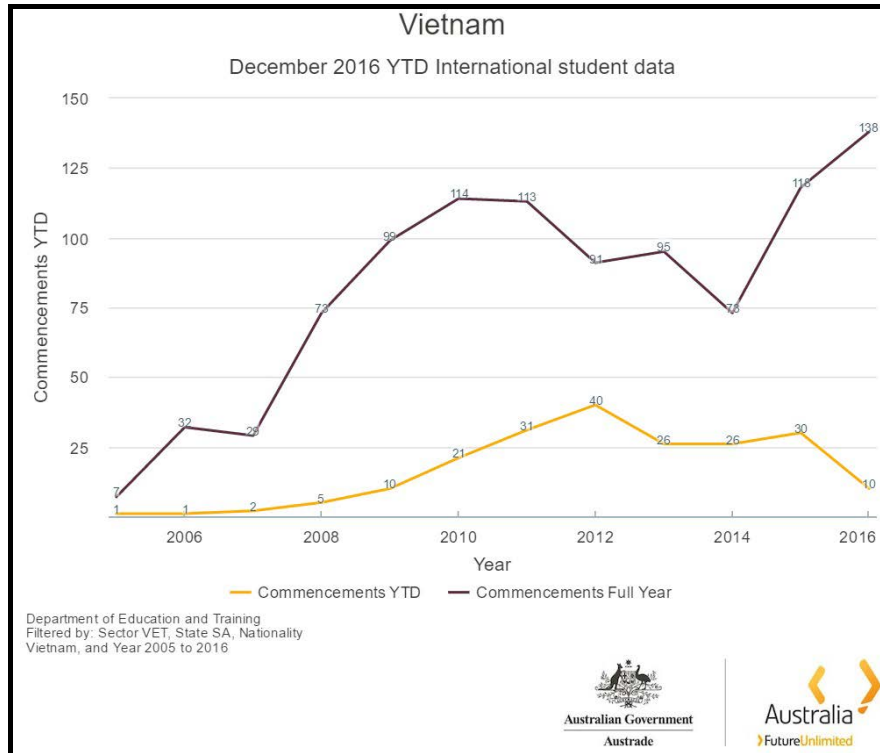
10.6 Malaysia - was ranked 6th with 6401 commencements nationally with a growth rate 54% and 10th in SA with 100 commencements with a growth rate of 39%.



10.7 Taiwan - was ranked 7th with 5191 commencements nationally with a growth rate 33% and 8th in SA with 73 commencements with a growth rate of 74%.



10.8 Vietnam – was ranked 9th with 4196 commencements nationally with a growth rate -4% and 7th in SA with 138 commencements with a growth rate of 17%.



11. NATIONAL TOP 20 VET SOURCE MARKETS

2016 DEPARTMENT OF EDUCATION AND TRAINING INTERNATIONAL STUDENT COMMENCEMENTS DATA						
National TOP 20 VET SOURCE MARKETS				South Australian TOP 20 VET SOURCE MARKETS		
2015	2016	GROWTH	COUNTRY	2015	2016	GROWTH
16,812	15,959	-5.1%	INDIA	695	665	-4.3%
9,118	10,146	11.3%	CHINA	422	554	31.3%
8,441	9,793	16.0%	NEPAL	55	268	387.3%
8,706	8,864	1.8%	HONG KONG	190	197	3.7%
5,493	7,788	41.8%	KOREA	164	179	9.1%
4,149	6,401	54.3%	KENYA	98	179	82.7%
3,909	5,191	32.8%	VIETNAM	118	138	16.9%
5,318	5,191	-2.4%	TAIWAN	73	127	74.0%
4,363	4,196	-3.8%	PHILIPPINES	139	110	-20.9%
3,249	3,831	17.9%	MALAYSIA	72	100	38.9%

3,685	3,505	-4.9%	ITALY	61	73	19.7%
2,982	3,166	6.2%	BRAZIL	45	45	0.0%
2,029	2,985	47.1%	THAILAND	23	40	73.9%
2,585	2,730	5.6%	UK	68	36	-47.1%
2,263	2,601	14.9%	INDONESIA	26	34	30.8%
2,184	2,360	8.1%	JAPAN	29	33	13.8%
2,830	2,269	-19.8%	ZIMBABWE	23	22	-4.3%
1,460	1,558	6.7%	NIGERIA	18	21	16.7%
1,314	1,552	18.1%	COLOMBIA	21	20	-4.8%
1,281	1,431	11.7%	CANADA	8	19	137.5%

12. STATE AND TERRITORY INTERNATIONAL STUDENT DATA

DEPARTMENT OF EDUCATION AND TRAINING DECEMBER 2016 YTD INTERNATIONAL STUDENT COMMENCEMENTS DATA							
STATE	PROVIDER TYPE	ENROLMENTS			COMMENCEMENTS		
		2015	2016	% Change	2015	2016	% Change
NSW	Government	4,275	3,596	-19%	3,244	2,534	-22%
	Non-Government	67,789	76,004	11%	43,577	47,181	8%
New South Wales total		72,064	79,600	9%	46,821	49,715	6%
VIC	Government	6,797	6,275	-8%	4,740	4,268	-10%
	Non-Government	40,477	46,669	13%	25,066	29,795	19%
Victoria total		47,274	52,944	11%	29,806	34,063	14%
QLD	Government	2,779	2,578	-8%	1,837	1,728	-6%
	Non-Government	24,524	27,316	10%	15,984	17,018	6%
Queensland total		27,303	29,894	9%	17,821	18,746	5%
SA	Government	704	818	14%	480	521	9%
	Non-Government	4,077	4,521	10%	2,127	2,593	22%

SOUTH AUSTRALIA total		4,781	5,339	10%	2,607	3,114	19%
WA	Government	4,303	4,051	-6%	3,474	3,168	-9%
	Non-Government	11,115	13,781	19%	7,160	8,991	26%
Western Australia total		15,418	17,832	14%	10,634	12,159	14%
TAS	Government	209	238	12%	181	204	13%
	Non-Government	7	242	97%	7	238	3300%
Tasmania total		216	480	55%	188	442	135%
NT	Government	171	168	-2%	139	117	-16%
	Non-Government	156	201	22%	84	125	49%
Northern Territory total		327	369	11%	223	242	9%
ACT	Government	638	710	10%	429	583	36%
	Non-Government	204	174	-17%	137	91	-34%
ACT total		842	884	5%	566	674	19%

13. ATTACHMENT 2: South Australian CRICOS Listed VET RTO'S

South Australia Registered CRICOS Training Providers	Broad Course areas CRICOS listed	Course Scope	Number of courses offered				
			SA	VIC	NSW	QLD	WA
4Life CRICOS code 03222F - registered student capacity 385, campuses	Health Services Business	Cert III, IV & Diploma	5 Head office Sydney	0	9	0	0
Adelaide College of Ministries CRICOS code 00990A registered student capacity 50	Religious Studies	Diploma, Associate Degree and Bachelor	3	0	0	0	0

Adelaide Educators - CRICOS code 03187D - registered student capacity 230	Business English Language	Cert III, IV & Diploma	16	0	0	0	0
ACT Education Group CRICOS code 029556J - registered student capacity 850	Business Hospitality	Cert III, IV Diploma & Advanced Diploma	11	0	0	0	0
Adelaide Institute of Business and Technology CRICOS code 03133G - registered student capacity 258	Business Information Technology English Language	Cert IV, Diploma & Graduate Diploma	19 4 SA locations	0	0	0	0
Adelaide Institute of Management and Technology Pty Ltd. CRICOS code 02977D - registered student capacity 174	Business	Diploma & Advanced Diploma	4	0	0	0	0
Adelaide Hospitality and Tourism School (AHTS) CRICOS code 01774A - registered student capacity 140	Business Hospitality	Cert III, IV, Diploma & Advanced Diploma	12	0	0	0	0
Australian Adelaide International College AAIC CRICOS code 03126F - registered student capacity 218	Business English Language	Cert IV, Diploma & Advanced Diploma	9	0	0	0	0
Australian College of Theology CRICOS code 02650E registered student capacity 353	Religious Studies	Diploma to Doctorate	5 Head office Sydney	39	24	24	0

Australian Ideal College CRICOS code 03053G - registered student capacity 174	Business English Language	Cert III, IV Diploma & Advanced Diploma	12 Head office Sydney	0	22	0	0
Australian Institute of Translation and Interpretation CRICOS code 02692F registered student capacity 450	Interpreting & Translation	Diploma & Advanced Diploma	2 Head office Melbourne	4	0	0	0
Bruce Hart Wig Flying School CRICOS code 02845E - registered student capacity 12	Aviation	Cert IV, Diploma	3	0	0	0	0
Careers Australia Education Institute CRICOS code 03224D - registered student capacity 750	Health Services Business Hospitality English Language	Cert III, IV & Diploma	8 Head office Melbourne	12	8	21	0
Clip Joint Academy of Hairdressing CRICOS code 02103K - registered student capacity 99	Hair and Beauty	Cert II, III, IV & Diploma	12	0	0	0	0
Durban International College CRICOS code 02915G - registered student capacity 295	Business Hospitality	Cert III, IV, Diploma & Advanced Diploma	12 2 SA locations	0	0	0	0
Education Training & Employment Australia CRICOS code 02925E - registered student capacity 1386	Automotive Business Health Services	Cert I, III, IV, & Diploma	41 Head office Victoria	124	58	34	41
English College of Adelaide CRICOS code 00989E - registered	English Language		4	0	0	0	0

student capacity 70							
EQUALS International CRICOS code 02804C - registered student capacity 611	Business Hospitality Health Services	Cert III, IV, Diploma, Advanced Diploma & Graduate Diploma	49 3 SA locations	0	0	0	0
Flight Training Adelaide CRICOS code 02649J - registered student capacity 350	Aviation	Cert IV, Diploma & Advanced Diploma	10	0	0	0	0
IAA Education CRICOS code 03211J - registered student capacity 150	Business English Language	Cert IV, Diploma & Advanced Diploma	7	0	0	0	0
IKON Institute CRICOS code - registered student capacity (TBA)	Complementary Therapies		CRICOS registratio n currently being processed				
Influencers Leadership College CRICOS code 01027C - registered student capacity 100	Religious Studies	Cert IV &Diploma					
Infotech Professionals CRICOS code 01917B - registered student capacity 884	Business Information Technology English Language	Diploma & Advanced Diploma	22 Head office Sydney	0	11	0	0
Ironwood Career and Training CRICOS code 03039E - registered student capacity 300	Agriculture Business Horticulture English Language	Cert II, III, IV, Diploma, Advanced Diploma & Graduate Diploma	28	0	0	0	0
Intensive English Language Institute (Community for Global	English Language	English Language	7	0	0	0	0

Communication) CRICOS code 02916F - registered student capacity 400							
Kaplan International English CRICOS code 03008A - registered student capacity 843	English Language		6 Head office Melbourn e	7	0	0	0
Jubin Hopkins CRICOS code 03189B - registered student capacity 290	Business Baking Information Technology English Language	Cert II, III, IV, Diploma, & Advanced Diploma	20	0	0	0	0
Le Cordon Bleu CRICOS code 0238M registered student capacity 2430	Hospitality	Cert II, III, IV, Diploma, Advanced Diploma, Degree & Graduate Diploma	15	6	10	0	4
Meridian vocational college CRICOS code 03551M - registered student capacity 150	Management Hospitality	Cert III, IV, & Diploma	4	0	0	0	0
Media Makeup Academy and Agency CRICOS Code03159G) registered student capacity 40	Screen & Media	Cert III, IV, & Diploma	4	0	0	0	0
Natwide Personnel CRICOS code 03518A - registered student capacity 160	Aviation Business Logistics	Diploma & Advanced Diploma	4	0	0	0	0
Queensford College CRICOS code 03010G - registered student capacity 2160	Business Health Services Hospitality English Language	Cert I, II, III, IV & Diploma	32 Head office Brisbane	0	32	38	0

Sapien College CRICOS code 03468F - registered student capacity 500	Business Hospitality English Language	Cert II, III, IV, Diploma & Advanced Diploma	15 Head office Yeerongpi lly	0	0	15	0
Salford College CRICOS code 03076M - registered student capacity 560	Business Hospitality English Language	Cert I, II, III, IV, Diploma & Advanced Diploma	39 2 SA locations	0	0	0	0
Sheffield College of Technology CRICOS code 03034K - registered student capacity 238	Automotive Business	Cert III, IV, Diploma & Advanced Diploma	10	0	0	0	0
South Australian College of English CRICOS 00094M - registered student capacity 425	English Language	English Language	9	6	0	0	0
Southern Cross Education Institute CRICOS code 02934D - registered student capacity 1500	Business Health Services Hospitality English Language Screen and Media	Cert II, III, IV, Diploma & Advanced Diploma	47	63	0	0	0
Swann College CRICOS code 03555G - registered student capacity 125	Business Automotive	Cert II, III, IV, Diploma & Advanced Diploma	4	0	0	0	0
Trison Business College CRICOS code 02359G - registered student capacity 1265	Business English Language	Cert II, III, IV, Diploma Advanced Diploma & Associate Diploma	23	23	38	0	0
Tabor Adelaide CRICOS code 03436C - registered student capacity 30	Religious Studies	Diploma to Doctorate	21	0	0	0	15

TAFE SA CRICOS Code 00092B - registered student capacity 2000	11 Program Areas	Cert II, III, IV, Diploma & Advanced Diploma	235	0	0	0	0
The Quality Training and Hospitality College CRICOS code 02880B - registered student capacity 165	Hospitality	Cert II, III, IV, Diploma & Advanced Diploma	253 SA locations	0	14	0	0
Universal Network of Infotech CRICOS code 03042K - registered student capacity 60	Business Information Technology	Diploma	3	0	0	0	0

14. ATTACHMENT 3: Key Competitor Initiatives

14.1 Study Melbourne⁵

1. Student Welcome Desk - pick up your Student Welcome Pack at Melbourne's International Airport, delivered by the City of Melbourne.
2. Study Melbourne Experience - enjoy special offers to Victoria's great tourist attractions, events, festivals and sports games at discounted prices.
3. International Student Welfare Program - a new program for student organisations to receive funding to deliver projects for international students.
4. The Study Melbourne Student Centre is more than space to meet and study
We offer services for students in a range of situations
The first of its kind in Australia, the Study Melbourne Student Centre provides information, referral and practical support for all international students in Victoria.
At the Centre find information and help in addition to the help you can find at your university, college or school.

Many Languages

The Study Melbourne Student Centre can offer help in languages other than English. We have caseworkers who can help in many situations. We provide interpreting services for free.

General Information

At the Study Melbourne Student Centre, we provide general information and help with accommodation, health, employment and legal problems.
We can also help international students to access services in the community.

International Students in Urgent Situations

We can help with information and help to find the right service for students in crisis. We may also be able to provide casework support and practical help.

Study Melbourne Meet-Ups

Our meet-ups are free monthly events and activities, connecting you to community events in Victoria.

Resume Checking Service

Drop in to the Study Melbourne Student Centre and an experienced professional can check your resume.

No appointments are required, but come early to avoid disappointment. We offer this service every Tuesday from 2pm to 4 pm.

Free Legal Advice About Workplace Rights

The International Students Work Rights Legal Service offers free, confidential and independent legal advice for international students with work problems (excluding migration).

⁵ Study Melbourne. 2017. *Study Melbourne Student Centre*. Available at: <http://www.studymelbourne.vic.gov.au/help-and-support/study-melbourne-student-centre>. [Accessed 30 March 2017].

5. Live - Lead, Intern, Volunteer & Experience - LIVE offers opportunities for all international students studying in Victoria to make the most of their time here. Whatever stage of your student journey, LIVE has something to help you as you explore, make friends, get involved in community activities, get workplace experience or become a leader.
6. Victoria India Internship Program (VIIP) - The Australia India Institute (All) in Melbourne and the Australia India Institute @ Delhi are accepting expressions of interest from interns to participate in the Victoria India Internship Program (VIIP). The program is supported by the Victoria Government through the Department of Economic Development, Jobs, Transport and Resources.

The VIIP aims to engage students studying at Victorian education providers with meaningful professional and personal engagement with India. The internships will help to develop and enhance skills and understanding of the Indian market and company culture, connect employers with talented young Victorians via international workplaces or Indian workplace environments and increase awareness about trade relations between Victoria and India.

This program caters to all students, both domestic and international, who have studied in a Victorian education provider. Expressions of interest are invited from students who have either graduated with a degree or diploma or are near graduating.

The All will facilitate internship placements at Indian companies and organisations based and operating in India (10 positions) or at Indian companies operating in Victoria (5 positions). The roles being offered are in Indian companies that have an established track record in the fields of IT, Pharmaceuticals, Banking, Commerce, Consulting, Trade and Investment, E-Learning, Healthcare, Agriculture, Engineering, Education, Tourism, Resources or Finance.

Internships will run for 6 – 12 weeks between October 2016 and March 2017. Applicants will be responsible for arranging their own travel, insurance, visa and accommodation costs for internships based in India.

Applicants are invited to submit a resume and cover letter by COB Friday September 16 2016 identifying their chosen industry of interest and why they should be chosen for an internship placement.

14.2 Study NSW⁶

1. Airport Welcome Desk

2. 'Interchange' – Fostering International Students' Employability and Community Integration

StudyNSW sponsored six NSW universities – to develop and deliver a semester-length educational program to foster international students' entrepreneurial skills.

3. Free Legal Advice and Advocacy Service for All International Students in NSW

In October 2015, StudyNSW announced that it was partnering with Redfern Legal Centre and others to deliver a free legal advice service for all international students in NSW.

4. Work Integrated Learning Opportunities and Employment Outcomes

The pilot project – known as 'NSW Global Scope' – will offer WIL experience to up to 300 students in the public sector, with potential to scale the program to include thousands of students every year.

14.3 Study Queensland⁷

1. Vocational Training and Education (VET) Guide

⁶ 2017. https://www.industry.nsw.gov.au/__data/assets/pdf_file/0020/82334/StudyNSW-International-Education-Strategy.pdf, pg 14.

⁷ Study Queensland. 2017. *Vocational and Education Training*. Available at: <http://www.studyqueensland.qld.gov.au/Study/Vocational-Education-and-Training>. [Accessed 30 March 2017].