What will follow the international student boom?

Future directions for Australian higher education

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This paper highlights some of the challenges being faced by Australian higher education which are likely to have an impact over the next ten years and beyond and opportunities to deal with them. In doing so, the policy settings from the Dawkins reforms in the late 1980s to the present which have shaped the higher education landscape are described, bringing into perspective the operating context for Australian universities. Two key themes are discussed: universities' reliance on international students, and demographic shifts. The discussion that follows is how these drivers are likely to shape demand for higher education and what impact these will have on universities over the next ten years.

Keywords: higher education, public policy, Australia, students, demographic shifts, international education, planning and foresight.

Introduction

Over the past 30 years, Australia has trialled a series of educational reforms, courting fee deregulation, marketisation and liberalisation. These policy changes have been key drivers in the success of Australia's higher education sector, enabling many of its institutions to 'punch above their weight' globally as measured by various global ranking schemas. But it has also created economic dependencies that makes Australian institutions vulnerable more than ever to political international fluctuations.

Higher education reforms: a potted history

The success of Australia's higher education, as measured by the income generated from international students in fees and charges, has rested on policy reforms which started in the late 1980s under the leadership of the then federal education minister John Dawkins. Following the release of a discussion paper in December 1987 (Dawkins, 1987), the government's perspective on the future direction of higher remained unchanged when the White Paper was released in July 1988 (Meek, 1991). The implementation of these policies resulted in the amalgamation of institutions (from 19 universities and 73 other higher education institutions in 1987 to 38 institutions in 1991) and brought in a unified national system; an increase in the number of publicly-funded places available for study, and a new funding model on discipline and level of study, among many other changes.

The main argument for undertaking successive public policy reforms was that Australia needed to be more competitive internationally. As Meek (1991) observes, Australia's massive overseas deficit is mentioned as a motivating factor for many of the Hawke Labor Government's policies. These reforms, which went through during the 1990s and 2000s, delivered unprecedented economic stability and growth. They were influenced by the neoliberal forces that prevailed at that time. Many governments around

Table 1: Australian higher education reforms from 1988 to 2014

Review	*Purpose*	*Key outcomes*
Higher Education: a policy statement. Dawkins [White Paper] (1988)	Expand capacity and effectiveness of the sector.	Amalgamations, end of binary system, increase in public funding, increased capacity to offer places to international students.
Learning for Life: review of higher education financing and policy. [The West Review]. (DETYA, 1998)	Identify options for the financing of higher education teaching and research over the next 20 years.	Move towards a 'student-centred' approach; quality agency established; set groundwork for subsequent reviews to address issues of access, competition, levels of funding.
Review of Higher Education in Australia. [The Nelson Review]. (Nelson, 2003)	Determine appropriate mechanisms and levels for funding higher education.	Block grant replaced by per-student student funding, increase in maximum student contribution, universities permitted to set their own student contribution, regional loading for universities, additional funding for equity and quality programs, access to income contingent loans for full fee-paying courses.
Review of Australian Higher Education. [Bradley Review] (Bradley *et al.*, 2008)	Examine state of the Australian system against international best practice, explore future directions and consider options available.	Student demand-driven funding system introduced; continued ability to offer full-fee courses for domestic undergraduate students; setting participation and equity targets; a revised qualifications framework and established a new regulator.
Higher Education Base Funding Review [Lomax-Smith Review] (Lomax-Smith *et al.*, 2011)	Identify principles to support public investment in higher education	Government accepted recommendations but no significant changes to existing arrangements were required. It recommended average level of base funding per place be increased, areas of underfunding were identified, maximum student contribution should remain capped.
Report of the National Commission of Audit (2014)	Review the performance, functions and roles of the government and recommend efficiencies, savings and productivity improvements	Review found Government investment in higher education contributes to a more agile and productive workforce. National priorities for research were updated and reviews of research funding policy and research training were commissioned.
Review of the Demand Driven System . Kemp-Norton Review (Kemp & Norton, 2014)	Examine impact of the demand driven funding system	All higher education providers should be eligible for government supported places, further open system for competition between public and private providers.

the world turned to economic rationalist approaches to solving problems they confronted (such as trade deficits and reduced ability to fund programs). This resulted in the adoption of market-driven approaches to solving these problems (Meek, 2003; Broucker & de Wit, 2015; Cantwell 2016).

With each wave of reform, the Australian government has further advanced liberalisation, heightened institutional competition and increased deregulation and marketisation of the higher education sector. Table 1 provides a summary of policy reforms between 1998 and 2014.

Additionally, two further reviews were completed in 2019. First, the review into the Higher Education Provider Category Standards was undertaken by Professor Peter Coaldrake and the government announced in December 2019 that it accepted the review's ten recommendations (Department of Education, 2019a). These included:

- Retaining research as 'a defining feature of what it means to be a university'.
- Adding more formal requirements and benchmarks for both the quantity and quality of university research.
- Requiring universities to offer doctorates by research and undertake 'world standard' research in at least three broad fields of education, or at least 30 per cent of the broad fields of education in which they teach, whichever is greater.

Second, the Review of the Australian Qualifications Framework, led by Professor Peter Noonan was also completed in 2019 and in December 2019 the federal government accepted all its recommendations in relation to higher education and accepted the aims of the recommendations of the review in relation to vocational education, contingent on further discussions with state and territory governments (Department of Education, 2019b). The review recommended:

- Senior secondary students should be able to study subjects at school that count towards a vocational training qualification or university degree.
- Recognition of micro-credentials to allow providers to offer short, highly targeted courses.
- Vocational education and training and higher education should have clear and flexible entry and exit points, as well as pathways within and between the two sectors, to allow students to mix and match the subjects they study to meet their education requirements.

Over the next few years, we will see the extent to which the recommendations from the Coaldrake and Noonan reviews are enacted and whether these deliver the projected outcomes. To sum up, what we have seen over the past 30 years is that policy makers in Australia have been unable to implement an integrated tertiary education system and have not addressed the imbalance in funding provision across higher education and vocational education. In fact, we witnessed a significant decline in participation in vocational education and a weakening in the standing of public vocational educational institutions. Further, it should be noted that although Australia has harmonised the mutual recognition of qualifications and occupations, there is no agreement for credit transfer and recognition of prior learning across Australian institutions.

The key message for university leaders is the need to consider the value proposition of their universities' locations and the communities in which they operate and serve to set them apart from one another.

One thing that remains obvious is that, for Australia to remain competitive considering the emergence of Asia as an education and knowledge powerhouse, it needs to have a cohesive long-term tertiary education policy inclusive of both the higher education and vocational education sectors and supported by the appropriate level of funding, regulation, quality assurance and legislative framework.

Higher education in context: Facts & figures

Back in 1987, Australia's population reached 16.5 million and the average full-time adult average weekly ordinary time earnings was $429.90 compared to $1,633 as at May 2019 (Australian Bureau of Statistics – ABS, 1988; ABS, 2019a). There were 73 colleges of advanced education as well as 19 universities, with 393,734 student enrolments, an average of 4,280 enrolments per institution (Commonwealth Tertiary Education Commission (CTEC), 1987). The combined expenditure of universities and other institutions totalled $2.53 billion (DEET, 1988). Further, 6.9 per cent of the civilian population aged 15 and over had been awarded a higher education degree (ABS, 1988).

As a result of amalgamations, universities increased in size and complexity. In 1993, the first year for which data were reported as a unified national system, across Australia there were 575,617 students and 76,618 full-time and fractional full-time staff, with an overall expenditure of $6.0 billion. Over 80 per cent of enrolments were at the bachelor's level; 15 per cent in postgraduate by coursework programs, and enrolments in higher degree by research increased to 3.6 per cent (DEET 1994).

By 2018, there were 169 providers of higher education programs in Australia, which included 37 public universities (Norton & Cherastidtham, 2018). Total enrolments in Australia were 1.6 million, of which 1.4 million were in the 37 public universities (Department of Education, 2019c). Total revenue from Australian universities was $32.0 billion in 2017, with $31.8 billion generated by the 37 public universities. Fifty-four per cent of revenue came from government sources or the Higher Education Loan Program and 23 per cent from international student fees and charges (DET, 2018a). The full-time and fractional full-time staff increased to nearly 130,000 in 2017 (DET, 2018b).

Features of Australia's higher education

Three decades on from its inception, Australia's unified national system is defined by several distinguishable features which attest to the transformative nature of the successive waves of policy reforms of the intervening years. A key feature of Australia's enviable position as a global leader in exporting educational services is that it has built a robust quality assurance (QA) framework. The basis of this framework goes back to 1999 when the then minister of education announced the establishment of a new quality assurance framework for the higher education sector (Shah, Nair & Wilson, 2011). This resulted in the establishment of the Australian University Quality Agency (AUQA) in 1999 as an independent body to audit institutions and issue public reports. In 2011, the Tertiary Education Quality and Standards Agency (TEQSA) was established as an agency with the task of applying and enforcing the TEQSA legislation and additional legislative frameworks. AUQA operated until 2011 when its functions were transferred to TEQSA, which become operational in 2012 (TEQSA, nd).

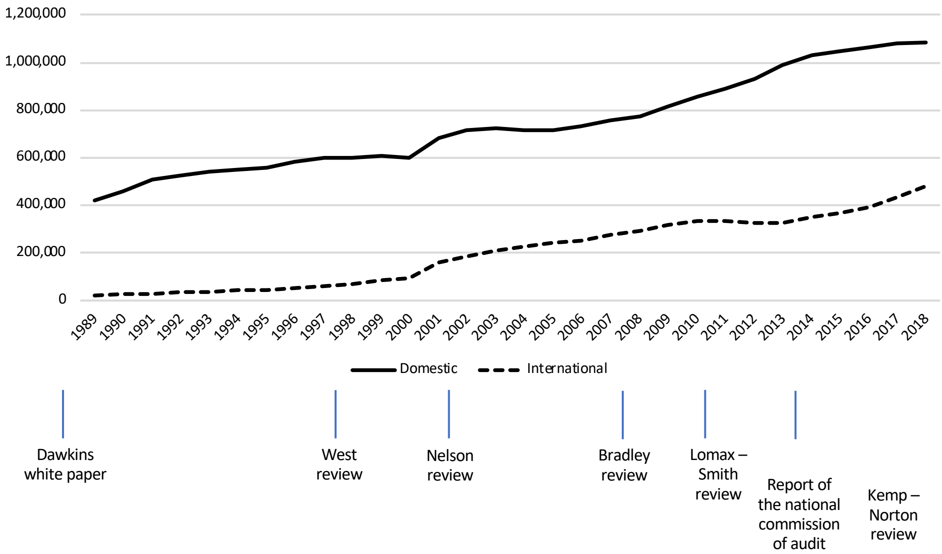

Figure 1: Domestic and international student enrolments in Australian higher education, 1989–2018

Source: Compiled by the author, using a customised dataset from the Department of Education

Australia's unified university system has several other significant features. In Australia, universities are homogenous (i.e. offer similar programs) and as a massified system, there is no significant diversity in discipline offerings and student cohorts. Partly a function of population size and distribution, there are fewer institutions (37 public and five private universities) compared to other national systems (e.g. 164 in the United Kingdom (UK) and 2,828 four-year degree-granting institutions in the United States of America (USA)). In addition, universities are large: the average size of Australian institutions is 34,325 enrolments, compared to 13,740 in the UK and 4,500 in the USA. Another feature is that all Australian universities are expected to be research intensive.

Finally, all universities are comprehensive and offer doctoral programs. Thirty-one out of the 37 public universities teach across ten broad fields of education and the median number of doctoral program completions in universities in 2018 was just over 190.

As Davis has pointed out, Australian universities have adopted a single idea of a university. That idea was spelled out in the Dawkins' White Paper (1988): A national framework will be developed on the basis that there should be 'consistency in the types and length of similar courses in higher education' (Davis, 2017, p. 33).

Whilst these features can be viewed as Australia's strengths and key to the success in global university rankings, they are also Australia's threats. Consider that there is no differentiation in what universities are deemed to be distinctively strong or specialised in. There is also no differentiation in what courses are on offer in locations across Australia. While this lack of differentiation has not driven student demand away from the 37 public universities over the past 30 years, the increased relevance of the private universities and non-university providers in educating Australia's domestic population as well as those overseas students who choose to study onshore, it cannot be underestimated. The impact of technological transformation on the provision of educational services and the continued growth of online learning and other forms of delivery also cannot be underestimated.

The key message for university leaders is the need to consider the value proposition of their universities' locations and the communities in which they operate and serve to set them apart from one another.

Over-reliance on international students

The number of student enrolments in Australian higher education has increased from 441,074 in 1989 to 1.56 million in 2018. Over this period, domestic student enrolments have seen an annual average growth of 3.4 per cent compared to 11.9 per cent for international students (Department of Education, 2019c) – see Figure 1. In recent years Australia has benefited from instability in the UK and the USA in recruiting international students, however Australia lags those countries in attracting top quality students. The other factor which has made Australian universities increase their international student numbers is that domestic demand for education is flat.

In recent years, international student enrolments have underwritten the growth seen in Australian universities. Since 2000, the 37 public universities and all other higher education providers have earned more than A$90 billion from international students via tuition fees and charges. In 2000, the fee income derived from international students for higher education totalled $978 million, increasing to $11,270 million by 2018 (ABS, 2019b). Whilst the Australian government contributions to universities continue to rise, revenue from international students has increased five times faster than the Australian government contributions since 1995. In 1995, Commonwealth government grants totalled $4.3 billion increasing to $17.2 billion by 2017; by comparison, the income generated from international students increased from $441.2 million in 1995 to $7.5 billion in 2017 (DETYA, 1996; DET, 2018). Over this period, we have seen that Australia's educational services exports across all sectors have become the third-largest export industry.

This strong growth has led universities to depend on income from international students to supplement government-sourced income. In 1995, 5.9 per cent of Australian universities' revenue came from international students, compared to 23.3 per cent in 2017 (DETYA, 1996; DET, 2018a). In fact, the University of Melbourne received A$879.3 million in income from international students (or 33 per cent of total revenue) in 2018, compared to A$23.6 million (or 4.5 per cent of total revenue) in 1995 (University of Melbourne, 2019; DETYA, 1996). This means that Australian universities would suffer significant financial loss if international student numbers were to steeply decline. In 2018, 33 per cent of international students were from mainland China, compared to 4.6 per cent in 2000 (Department of Education, 2019c; DETYA, 2001). As Birrell and Betts (2018) point out, there is the danger that the Chinese government in pursuit of its own geopolitical agenda could deter or even ban Chinese students from enrolling in programs at Australian universities, and they conclude that such an occurrence could have serious financial consequences, particularly for the Group of Eight universities.

The number of enrolments in higher education globally (including those who seek to study abroad) is expected to rise further, with East Asia and the Pacific being the region with the largest number of enrolments. However, there is no guarantee that Australia and the traditional host countries of international students will continue to be the main beneficiaries. In recent years China has emerged as a source but also a host country for transnational education. As China continues to build its capacity (and quality) to educate its own people, perhaps the Chinese appetite for offshore study could diminish in the coming years.

Australian universities are urged to have a sound risk management strategy, realising that the loss of a market the size of China's could not be replaced by one single market. Australian universities need to diversify their international student recruitment away from traditional markets, instead focusing on middle income economies and countries with which Australia has forged strategic trading partnerships, including harmonisation and recognition of qualifications. A case in point is the closer links Australia has forged with Chile, Peru, Colombia and Mexico over the past 20 years. Like Australia, these countries have embraced trade liberalisation and have also increased two-way trade with Australia.

Demographic challenges ahead

As we live in an era surrounded by uncertainty and witnessing many economic, social and geopolitical shifts, there is no guarantee that Australia's ongoing educational success is assured. There are several challenges, many of which have a demographic as well as a geopolitical connotation. The way the state, civil society and market forces respond to these challenges will determine the path for Australia over the next 10 to 20 years.

As noted in the Dawkins White Paper (1988), the national demand for higher education had exceeded supply in the previous four years with an estimated unmet demand of 20,000 qualified applicants, half of which were school leavers. The White Paper also noted that the demand for education would continue to rise strongly until the early 1990s, when the 17-19-year-old cohort would begin to decline in size. The last statistical report issued by CTEC, before it was disbanded by minister Dawkins, observed that the number of students enrolled in higher education had an annual average growth of 2.7 per cent between 1980 and 1987 (CTEC, 1987). However, this growth pattern no longer exists. By 2020, we have observed that the domestic demand for higher education has been flat for some years. The analysis of the projected domestic enrolments for higher education that follows suggests that the expected growth to 2030 will be less than half the annual growth average observed during the 1980s and throughout the first twelve years of the 21st century (Calderon, 2019).

Although the number of young people completing Year 12 is increasing across Australia (from 64 per cent in 2009 to 79 per cent in 2018) (Australian Curriculum, Assessment and Reporting Authority – ACARA, 2019), it has been estimated that the additional number of youths seeking to enter university between 2018 and 2030 will be 48,000 and this would equate to having the equivalent of one additional university. There is indeed a limited pool of school leavers to boost domestic commencing enrolments and universities across Australia face increased competition to attract school leavers.

These estimates are built from state and territory level to national level, using the ABS population projections for Australia (ABS, 2018a) in parallel with an analysis on the number of full-time and part-time students by age and grade over the period from 2006 to 2018 (ABS, 2019c). This analysis suggests that the Australian 18-64-year-old population is expected to rise minimally over the period from 2017 to 2030, with an average annual population growth of 1.2 per cent. In 2017, there were 15.3 million people in the 18-64 age bracket, this is expected to rise to 16.6 million in 2023 and reach 17.9 million in 2030. Therefore life-long learners (or seekers of second and post initial qualification) are more likely to be driving domestic student demand.

Further, the analysis suggests that:

- The 16-24 domestic commencing student cohort is expected to rise by between 42,000 to 49,000 by 2030, that is 1.2 per cent per year from 263,300 enrolments in 2017 to between 303,300 to 310,600 in 2030.
- The 25-39 domestic commencing student cohort is expected to rise by between 18,000 to 23,800 by 2030, that is 1.4 per cent per year from 104,700 enrolments in 2017 to between 113,300 to 114,100 in 2030.
- The 40-64 domestic commencing student cohort is expected to rise by between 6,700 to 7,800 by 2030, that is 1.1 per cent per year from 46,376 in 2017 to between 53,400 to 54,500 in 2030 (Calderon, 2019).

The implications for universities of this reduced population growth are significant. While the domestic school leaver population represents the main student cohort, domestic undergraduates are increasingly moving towards online and multi modal studies. This shift is likely to shape the kind of student experience university leaders would have to offer to the younger cohorts in years to come. In 2002, 82 per cent of domestic undergraduate students were on campus; 12 per cent were online and 6 per cent were multi modal. By 2018, 67 per cent were on campus, 16 per cent were online and 17 per cent were multi-modal (Department of Education, 2019c). Should current trends persist, over the next 10 years about 55 per cent of domestic undergraduate students will be on campus; 20 per cent online and 25 per cent multi modal.

We also see that domestic postgraduate students are significantly moving towards the off-campus mode of study. In 2002, 71 per cent of Australian domestic postgraduate students studied on campus, this number decreased to 54 per cent in 2018. In turn we see that the online mode increased from 26 per cent in 2002 to 37 per cent in 2018 (Department of Education, 2019c). By 2030, it can be expected that roughly 40 per cent of the domestic postgraduate student population will be exclusively studying on campus.

What these shifts in study mode mean for the student cohort on campus is that these will largely be international students, because due to visa restrictions, international students are limited in the extent to which they can undertake studies online or multi-modally. However, for domestic students, these shifts in mode of study and interaction could mean that managing student wellbeing will come to be of paramount importance. This will represent a rethink for university decision makers in how best to support an increasingly culturally and ethnically diverse student (and academic staff) population.

Educational inequality

Although domestic demand for higher education is flat, there is a disparity in the levels of educational attainment in the 20-64-year-old Australian population. Over the period from 2004 to 2018 there was a strong increase in the proportion of persons holding a bachelor's degree or higher qualification from 21.1 per cent to 31.4 per cent (ABS, 2018a). We observe that the Australian Capital Territory (49.3 per cent), New South Wales (34.4 per cent) and Victoria (34.1 per cent) are by far the best performers compared to the weakest performers, i.e. Queensland (24.4 per cent) and Tasmania (23.3 per cent).

We also observe that persons living in remote and very remote (15.7 per cent) and outer regional (16.8 per cent) areas are at half the rate of educational attainment (i.e. bachelor's or higher) of those living in major cities (36.0 per cent). There is also a disparity in educational attainment between male and female students. In 2004, 19.8 per cent of the male population held a qualification increasing steadily to 27.9 per cent in 2018. In turn females showed a stronger increase rising from 22.4 per cent in 2004 to 34.9 per cent in 2018. Overall, a larger percentage of females holding a qualification compared to males, and females also showed stronger growth in the period 2004-2018 (ABS, 2018b). As a matter of public policy, both commonwealth and state and territory governments need to mitigate the increased inequalities which result from uneven indices of educational attainment. One way to do so is by providing the financial and other forms of incentives to those most disadvantaged to not only enrol at university but also to complete a degree. Doing so may somehow boost domestic demand for higher education.

What lies ahead

An analysis (by the author) of universities' financial statements over the 2014 to 2018 period (published in the institutions' annual report and finance statistics by the Department of Education (nd.)) suggests that over time, Australian universities' revenue growth is weaker relative to expenditure. Therefore, over the next few years we are likely to see reduced operating results, and in some instances ongoing deficits. As argued earlier, domestic demand for university education is flat (growth estimated at 1.2 per cent per year), while geopolitical factors will influence the size and shape of international education.

In a higher education system largely funded by taxpayers, there are limited revenue opportunities in a competitive market environment: The Australian domestic fee-paying market is capped (if not non-existent); industry contributions to support universities' ability to educate and train the labour force is atypical (yet we often read media reports that industry demands 'job-ready' graduates), and philanthropy is relatively a foreign concept. Over the next few years, Australian universities might have to reduce overheads, in part due to the influence of higher cost but also due to automation and technological transformation. It also means that universities will shut down programs in which student demand and discipline relevance have subsided. As the shift to online delivery for subjects continue to scale up (including emergence of newer online learning platforms), the academic workforce will continue to be challenged by those shifts.

At the system level, over the next ten years Australian universities are likely to confront:

- Tightened government financial support; in turn increased student financial contribution.
- Increased emphasis on outcomes-based and performance-based funding (something which has been in the making for more than 20 years).
- Targeted policies on access and participation – focusing on disadvantaged groups and geographies with low educational attainment.
- A focus on students' wellbeing (including mental health); student affordability and ability to repay through the taxation system.
- A focus on reconfiguration of what it means to be a university; rebalancing institutional mission (including communities and jurisdictions being served) and addressing national priorities.

There is no doubt that the road ahead for Australian universities is bumpy. While Birrell & Betts (2018) sounded alarmist when they described the situation of Australian universities as precarious because of reliance on international students, their assessment and fears for what lies ahead are valid.

Finally, the opinion of the auditor general of Victoria contained in the results of the 2018 audit of universities is that universities need to 'monitor circumstances abroad, and actively manage its recruitment programs to increase the diversity of the source countries that make up the overseas student base' (Victorian Auditor-General's Office, 2019, p 30). The Auditor-General of New South Wales echoes the view of his Victorian counterpart and further adds that 'sudden changes in demand can challenge the ability of those universities to adjust their cost structures' (Audit Office of New South Wales, 2019, p. 19).

Policy responses from government, civil society, market forces and university leaders need to consider the spectrum of possibilities arising from these demographic and geopolitical shifts. Timeliness and moderation are central to mapping a way forward.

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