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australian school curriculum offshore

OPPORTUNITIES FOR GROWTH

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- Rhett Miller, Trade Commissioner (West China)
- Dr Stephan Muller, Deputy Principal Staff Development, Education Research & International, Haileybury
- Emily O'Callaghan, General Manager, IEAA

COVID-19

IEAA acknowledges the significant challenges faced by the sector, schools, students, graduates, and careers professionals as a result of the COVID-19 global pandemic. This research report was written during 2020, at a time of significant disruption, with long-term impacts still unknown. Undoubtedly, the global pandemic will disrupt society and the international education landscape for years to come. Despite the success over several decades in Australia's transnational education, there may be little practical options to grow new large-scale provisions overseas in the immediate term, and existing regions may become increasingly challenging to penetrate. It is unlikely that we will return to the way things were, but what we can do is equip ourselves with a roadmap on how to revitalise the sector. As institutions and schools diversify the way we engage students globally, transnational education will be a key driver in ensuring a sustainable Australian international education sector.

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Preface

In 2016, International Education Association of Australia (IEAA) published *Transnational Education and the Australian Schools Sector* (Burgess, 2016). This was the first detailed study on the topic in Australia, providing an overview of the governance of offshore engagement and data on the extent of provision at that time. Since that time, we have seen significantly heightened interest in this topic, with a review undertaken in one Australian state and a proliferation of market research on the global expansion of the international schools market. However, much of this recent research is not readily accessible.

This second IEAA study on the offshore engagement in the school sector aims to foster a deeper understanding of transnational curriculum engagement, to assess changes in patterns of provision and to identify opportunities post COVID-19 for future growth. This report draws on a wide range of recent research, interviews with key stakeholders across Australia, and the author's first-hand experience in working with the sector.

The insights presented here are only possible thanks to the cooperation of many individuals, institutions and governments and we are particularly grateful for the support that the school sector has provided in the production of this second IEAA study on offshore engagement in the school sector.

The IEAA conducts research to inform policy and practice in all aspects of international education, and I am very pleased that we have been able to make this further contribution to our understanding of this important but largely hidden dimension of Australia's global engagement.

Phil Honeywood

The Hon. Phil Honeywood

CEO, International Education Association of Australia

Glossary

ACACA	Australasian Curriculum, Assessment and Certification Authorities is the body for the chief executives of the authorities in the Australian states and territories and in New Zealand responsible for curriculum, assessment and certification in education.
ACARA	Australian Curriculum, Assessment and Reporting Authority, which manages the national curriculum from Foundation to Year 12 in specified learning areas, providing national leadership in curriculum development, educational assessment and national reporting.
ACT SSC	Australian Capital Territory Senior Secondary Certificate.
ATAR	Australian Tertiary Admission Rank, the mechanism by which high school graduates are assessed for undergraduate course entry in Australian universities.
Australian Curriculum	The national curriculum from Foundation to Year 10.
Certificate of Education	The official certification awarded by each state and territory for satisfactory completion of year 12.
Curriculum Authority	State and territory government agencies that have oversight of Foundation to Year 12 curriculum.
F–12	Foundation to year 12, equivalent to K–12, kindergarten to year 12.
HSC	New South Wales Higher School Certificate.
International School	A school which functions largely independently of the host country's curriculum or offers both national and international curriculum.
Offshore School	A school outside Australia delivering Australian curriculum.
Partner School	An offshore school that delivers Australian curriculum through a partnership with a school or Curriculum Authority in Australia.
QCE	Queensland Certificate of Education.
SACE	South Australian Certificate of Education.
TNE	Transnational education, the delivery of education based in one country to students resident in another country, either through program mobility (eg. curriculum licensing) or institution mobility (eg. branch campuses).
VCAA	Victorian Curriculum and Assessment Authority.
VCE	Victorian Certificate of Education.
VET	Vocational education and training.
WACE	Western Australian Certificate of Education.

Executive Summary

The international school sector has demonstrated significant global growth over the past decade, with the number of international schools rising to 11,451 by early 2020 (ISC Research, 2021). International schools are present in more than 200 countries with enrolments exceeding 5.8 million students and an estimated fee income of US$54.8 billion (Clark, 2014).

This report provides an overview of Australia's engagement as an exporter of school curriculum. The first part of this report considers the supply side of the global curriculum market, reviewing the characteristics of Australia's offshore activity, and providing a brief summary of key competitors to Australian curriculum. The second part of the report provides assessments of opportunities for Australian curriculum in ten key markets. These were provided by Austrade, through their network of in-country advisors.

Australia is a comparatively small-scale exporter of school curriculum, with only 103 of the world's 11,451 international schools teaching Australian curriculum. There has been solid growth over the past four years, with 28 per cent more offshore schools offering Australian curriculum since the first IEAA report in 2016. Using this measure, Australia is a net importer of curriculum, with more schools in Australia offering an international curriculum than overseas schools offering an Australian curriculum. These include 167 schools in Australia offering International Baccalaureate (IB) programs and two offering the Japanese national curriculum, among others.

We estimate that around 5,500 students are studying Australian school curriculum offshore, across 19 countries. Nearly all of the new schools that began offering Australian curriculum over the past four years are in China, which, with 54 schools, now accounts for more than half of the total. But with the deteriorating political relationship between China and Australia, coupled with increasing levels of state control of international businesses, we expect to see significantly less appetite for expansion by Australian providers until the situation improves, even though demand for international schooling in China remains strong, as our country profile shows. South East Asian countries are strongly represented, including Malaysia (13), Vietnam (7), Indonesia (6), Singapore (2), Philippines (2), Timor-Leste (1) and Laos (1). In the Pacific, there are schools teaching Australian curriculum in Papua New Guinea (6), Vanuatu (2), Fiji (1), Nauru (1) and New Caledonia (1).

Australia's federal system poses challenges for offshore provision. While there is an established national framework that sets out the Australian Curriculum from Foundation to Year 10 and aligned Australian Certificates of Education at Years 11 and 12, each state and territory is responsible for setting its own curriculum and assessment. With the exception of Tasmania and the Northern Territory, all Australian states and territories licence their curriculum for offshore delivery. Victoria (35) and South Australia (30) licence the largest number of offshore schools, with smaller numbers of schools teaching the curriculum of Western Australia (15), New South Wales (10), Queensland (7) and the Australian Capital Territory (6).

Australian Curriculum Authorities are competing with a small number of very large-scale UK and US providers, each of which has developed international curriculum, assessments, learning resources, online platforms, and staff development resources tailored to international schools. These include UK-accredited programs offered by Cambridge, Oxford and Pearson, the IB, and the US College Board's Advanced Placement Program. Interestingly, none of these market leaders is a government body offering a local curriculum internationally, as Australia and Canada do, albeit at a tiny fraction of the scale and offering a fraction of the resources.

One concerning consequence of the current competitive federalism is that very little data is available about Australian offshore delivery of school curriculum

Since we are such a minor player in this space, it is worth asking why offshore provision of Australian curriculum is important. The answers commonly put forward are that it:

- extends Australia's educational reach and influence across the Asia Pacific region
- expands choice for local students
- allows Australians abroad to study an Australian curriculum
- provides pathways for students who want to come to Australia for further study

And yet one concerning consequence of the current competitive federalism is that very little data is available about Australian offshore delivery of school curriculum. The data presented above was collected through a laborious process of collating quite different data sets and in some cases checking individual schools' websites. There is no data publicly available on student satisfaction, academic outcomes or subsequent study pathways.

There is little coordination between state and territory Curriculum Authorities in relation to offshore delivery, with each operating quite independently. This needs to change. There is broad agreement across the country about the need for integrity in licencing arrangements, the need to ensure equivalence, and to closely monitor quality and student learning outcomes. It should not be difficult to agree on nationally consistent practices that are aligned with international best practice. All states and territories that are engaged offshore would benefit from the establishment of a formal process to develop a consistent national approach. We also advocate for the development of a clear national brand. This could involve the promotion of the state and territory Senior Secondary Certificates of Education as 'Australian Certificates of Education', emphasising their common characteristics, quality and recognition. We use this term in this way in this report. An approach preferred by IEAA would be to develop a single Australian Certificate of Education that could be awarded to students upon attainment of one of the Senior Secondary Certificates of Education.

> There is little doubt that the experience of COVID-19 will reshape international education demand and patterns of provision for all sectors, including schools.

The second part of this report considers the demand side, and provides an assessment of opportunities in 12 key partner countries in Asia. Of particular significance to Australia is that more than 60 per cent of the world's international schools are located in Asia. There are opportunities in those countries where there is a growing middle class and interest in pursuing tertiary studies in Australia. Each of the country profiles included in this report outline a detailed summary of market conditions and trends that will assist in identifying opportunities for expansion.

There is little doubt that the experience of COVID-19 will reshape international education demand and patterns of provision for all sectors, including schools. Those schools catering primarily to local students may have been able to attract students who would otherwise have travelled to study onshore in Australia or New Zealand. Meanwhile, the return to Australia of many Australians working in Asia during the pandemic has posed challenges for those schools that cater to expats and those that employ Australian teachers. This situation will likely resolve somewhat over 2021 as conditions allow people to return to international postings, but there could be an ongoing downturn in the number of Australians working in the region due to heightened perception of risk and the rapid adoption and acceptance of remote working. However, such impacts are very difficult to assess in the absence of consistent data collection and reporting by Curriculum Authorities.

These current headwinds highlight the need for greater national coordination. Australia is a very small and fragmented player in a very large market that is dominated by a small number of competitors. The competitive federalism we see at present, which pits states and territories against each other, is hampering our ability to compete at scale. While recognising that states and territory Curriculum Authorities will continue to be central, a step-change is required in order to grow market share.

Recommendations

Improve national coordination

The Commonwealth, states and territories should work together to develop consistent standards, processes and resources in relation to licensing, quality assurance, data collection and reporting, and to develop ongoing processes for cooperation between Curriculum Authorities.

Develop a national brand and a single source of truth

An outcome of the national approach outlined above should be to develop a single brand for Senior Secondary Certificates of Education that could be used to articulate the common features and strengths of the Australian curriculum to international audiences, including governments, schools and parents. This could be achieved either through a common branding of the existing certificates as 'Australian Certificates of Education' or the development of a single 'Australian Certificate of Education' that could be awarded to students in addition to their state or territory certificate. This recommendation needs to be urgently considered by the Australasian Curriculum, Assessment and Certification Authorities (ACACA) and the Ministerial Council of Education.

Introduction

Transnational education (TNE) has existed in the Australian school sector for close to 40 years. However, in the past decade, we have seen significant changes in political and regulatory environments, socio-economic conditions and business practices.

The IEAA 2016 research paper *Transnational Education and the Australian Schools Sector* revealed that Australia is an active international player, at that time delivering Australian curriculum to students in 74 offshore schools. While each of these schools plays an important role in supporting the learning needs of their students and contributes to Australia's education standing globally, these schools represent but a small fraction of what is a large and growing international school sector overseas.

This second IEAA study provides an overview of Australia's engagement as an exporter of school curriculum. The first part of this report considers the supply side of the global curriculum market, reviewing the characteristics of Australia's offshore activity, and providing a brief summary of key competitors to Australian curriculum. The second part of the report provides assessments of opportunities for Australian curriculum in ten key markets.

While the F–10 school years are not overlooked, this research gives greater consideration to the final two years of secondary schooling, as it is at this level that Australian curriculum is most often delivered abroad, primarily to students seeking a pathway to tertiary education in Australia.

This research involved extensive desk research drawing from published reports and a wide range of sources that are not in the public domain, including commercial market research, internal reports, and unpublished data provided by state and territory agencies. Consultations were untaken with representatives of state and territory authorities, schools operating offshore, federal government agencies, and experts in the field. In most cases, this involved a short questionnaire followed by an individual or group interview.

The Global Market for International Curriculum

Globally, the number of international schools is growing rapidly, reaching 11,451 in 2020 according to ISC Research (2021). Global enrolments exceed 5.8 million students with an estimated fee income of US$54.8 billion. ISC estimates that 80 per cent of international school students are drawn from the local community, with only around 20 per cent drawn from expatriate families. Over half of all international schools (6,680) are located in Asia, as detailed in the table below.

Table 1: International Schools in Asia

OCEANIA	EAST ASIA	SOUTH EAST ASIA	SOUTH ASIA	WESTERN ASIA
Australia	China	Brunei	Afghanistan	Bahrain
Fiji	Japan	Cambodia	Bangladesh	Iraq
Nauru	Mongolia	East Timor	Bhutan	Israel
New Calendonia	South Korea	Indonesia	India	Jordan
New Zealand	Taiwan	Laos	Maldives	Palestine
Papua New Guinea		Malaysia	Nepal	Qatar
Vanuatu		Myanmar	Pakistan	Saudi Arabia
		Philippines	Sri Lanka	Syria
		Singapore		Turkey
		Thailand		UAE
		Vietnam		Yemen
228 schools	**1,643 schools**	**1,516 schools**	**1,479 schools**	**1,814 schools**

Source: ISC Research, 2021

There are two key decision makers involved in shaping demand for international schooling: schools – which choose an international curriculum from the many on offer – and parents, who are able to choose among the international schools in their city, each of which has a particular identity and curriculum (Blake, no date).

There are many 'push' and 'pull' factors that influence parents and children's growing preference for international schools worldwide. Students are 'pushed' to enrol in international schools if they feel that their national post-secondary institutions do not meet their social or academic needs.

There are many 'push' and 'pull' factors that influence parents and children's growing preference for international schools worldwide.

They are simultaneously 'pulled' towards a type of school or type of curriculum that they consider will prove more suitable academically, developmentally, or in providing greater opportunities for tertiary study.

The literature on buyer behaviour for international schools suggests that many factors influence school choice, and while ranking these is difficult, the key influences that are frequently identified are:

- language of instruction
- school reputation
- curriculum
- family country of origin
- post-secondary study pathways
- evidence-based academic outcomes
- wellbeing concerns
- additional languages offered
- foreign/native speaker teaching staff
- tuition fees.

It appears that the primary appeal of Australian curriculum over the British and American competitors that dominate international schooling (which are discussed later in this report) is in providing a pathway to onshore tertiary education. Australia already benefits from strong brand recognition and favourable education perceptions concerning the quality of education, safety, affordability, visa requirements and post-study work opportunities. The strength of this pull factor is evidenced in the VCAA data indicating that 94 per cent of students who completed the VCE offshore in 2018 went on to study at Australian universities (VCAA, 2021).

Our review of the literature revealed that international schools tend to emphasise the results that have been achieved when studying a particular curriculum, rather than promoting the curriculum content itself. Parents, it seems, are largely agnostic about the features of the curriculum, but are very focused on outcomes for their child. Where the character of the curriculum is discussed in school brochures or on the school website, the focus is on its nationality and breadth of study options, presumably to differentiate it from other local and international curriculum competitors.

Australian School Curriculum Offshore

Under the Australian Constitution and *The Australian Education Act 2013* (amended 2017), oversight of school education is the formal responsibility of state and territory governments. Each state and territory offers its own Certificate of Education to students completing Year 12, and has its own approach to licensing offshore providers. As a result, Australia does not have a consistent national approach to offshore education.

Over time there has been an increasing level of harmonization of education across the country, coordinated by the Australian Curriculum, Assessment and Reporting Authority (ACARA). The Australian Curriculum, managed by ACARA, provides a framework for state and territory curriculum authorities, ensuring a high degree of consistency nationally, and ensures that the various Australian Certificates of Education are mutually recognised. At this time, five Australian states and one Australian territory offer their curriculum for delivery overseas, with Foundation to Year 10 aligned to the Australian Curriculum, and their own two-year Certificate of Education in Year 11 and Year 12.

> The Australian Curriculum, managed by ACARA, provides a framework for state and territory curriculum authorities, ensuring a high degree of consistency nationally, and ensures that the various Australian Certificates of Education are mutually recognised.

There is some variation in the number of subjects available offshore, the relationship between school-based and external assessment, and the academic calendar. While the Australian school year runs from January to December, some states (including Victoria and South Australia) have developed a Northern hemisphere calendar that runs from July to June.

Licencing Models

Each state and territory Curriculum Authority is responsible for developing its own systems for licencing schools to deliver offshore. There are three quite different approaches at present.

- **Licencing Offshore Schools** – The majority of state and territory Curriculum Authorities licence offshore schools directly. This is the model employed by New South Wales, Queensland, South Australia, Western Australia and the Australian Capital Territory. These states directly manage relationships with offshore schools, including the initial licensing, provision of professional development, ongoing quality assurance and periodical audits.
- **Licencing School Partnerships** – In Victoria, the Victorian Curriculum and Assessment Authority (VCAA) licences a Victorian school to deliver offshore, either in partnership with an offshore school or through an international branch campus. The VCAA and the Victorian school jointly manage the offshore provider.
- **No Offshore Licencing** – Tasmania and the Northern Territory do not currently licence their curriculum offshore.

This research revealed that those Curriculum Authorities that support offshore provision employ, on average, between 3 and 4 staff to manage offshore providers. This represents around one staff member for every ten offshore schools. Some Curriculum Authorities work with a handful of agents that act on behalf of offshore schools, supporting those schools with recruitment, program management and university pathways for their graduates.

Quality Assurance and Audit

There appears to be quite a high degree of consistency in the approaches employed by those Curriculum Authorities that support offshore provision, with similar philosophies, objectives and visions being evident in their practices. Each of the Authorities is highly aware of the need for integrity and equivalence to enhance Australia's reputation in the sector, and to maintain the highest quality standards of Australia's state and territory curricula offered overseas. This concern is embedded in the initial accreditation and licensing phase as well as ongoing data monitoring and regular audits.

Curriculum Authorities have a sound understanding of offshore schools' operating nuances, particularly those reflecting local operating environments with all of their particular features, challenges, and opportunities. This important local level appreciation of the regulatory, teaching and learning, and cultural context knowledge, strengthens the audit approach to ensure quality outcomes are sought, assessed and addressed.

Through a quality assurance and audit process, Curriculum Authorities oversee offshore schools':

- management and governance
- administrative systems
- infrastructure
- staffing
- marketing and promotion
- student admission and progression
- course delivery
- cultural awareness and sensitivities
- communication
- intellectual property and privacy
- academic integrity
- student learning outcomes.

The Scale of Australian Offshore Provision

As was the case for the 2016 IEAA report, data on the scale of offshore provision was compiled from Curriculum Authorities, offshore school websites, reports and consultations with sector experts. There is no national data collection, and the reporting practices of states and territories vary considerably, with very little data publicly available.

Table 2: Australian Curriculum Delivered Offshore

CURRICULUM AUTHORITY	CERTIFICATE OF EDUCATION	ASSESSMENT
Victorian Curriculum and Assessment Authority (VCAA)	Victorian Certificate of Education (VCE)	50% school 50% external
South Australian Department of Education	South Australian Certificate of Education (SACE)	70% school 30% external
Western Australia School Curriculum and Standards Authority (SCSA)	Western Australian Certificate of Education (WACE)	50% school 50% external
Queensland Curriculum and Assessment Authority (QCAA)	Queensland Certificate of Education (QCE)	75% school 25% external (STEM 50/50%)
Australian Capital Territory (ACT) Board of Senior Secondary Studies (BSSS)	ACT Senior Secondary Certificate (SSC)	100% school
New South Wales Education Standards Authority (NESA)	Higher School Certificate (HSC)	50% school 50% external

Source: Curriculum Authority websites

We must be careful to distinguish between an Australian-branded school and a school that offers Australian Curriculum. Of the ten international schools that are members of the Australian International Schools Association, only five of these offer a senior secondary Australian Certificate of Education and two appear not to follow the Australian Curriculum at all (AISA, 2020).

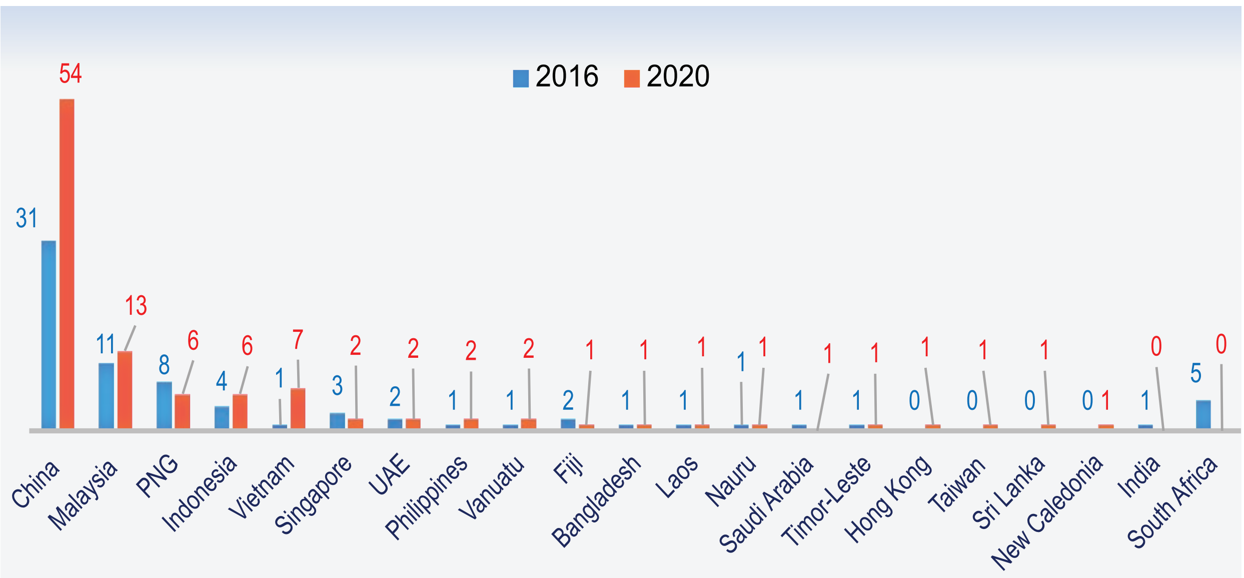
Australian curriculum is currently offered in 103 overseas schools, up from 74 schools in 2015. This represents a 28 per cent growth in the number of offshore schools over the past five years, an average annual growth rate of nearly seven per cent per year. While Australian curriculum is currently offered in 19 countries, over half of the schools are in China. We estimate that around 5,500 students are currently enrolled.

While any part of the Australian Curriculum from Foundation (F) to Year 12 can be delivered offshore, as Table 3 below shows, the vast majority of offshore schools are teaching one of the Year 11–12 Certificates of Education.

Federalism and Offshore Schools

Each state and territory engages internationally in its own way, promoting its own curriculum and ways of partnering. While there is some informal cooperation between some Curriculum Authorities, there is little formal collaboration and we found some jurisdictions to be quite wary of calls for national coordination. This is reflected in the reluctance of some Curriculum Authorities to even share basic data on the scale of offshore provision. A previous IEAA (2018) research report, International Education Data Gaps: Sector Perspectives, revealed that there is no accessible data on the Australian school sector offshore student numbers, student experience, offshore to onshore pathways, study tours, student and staff exchanges, summer schools, or other inbound or outbound student mobility. In this regard, little has changed since the previous IEAA Report on offshore schools, which stated in 2016 that unlike other international education sectors that fall under the purview of independent national regulators such as the Tertiary Education Quality and Standards Authority (TEQSA) or the Australian Skills Quality Agency (ASQA), oversight of school sector TNE engagement is a state/territory responsibility. Given this regulatory model of State governance, competing State interests may help explain the lack of transparency evident in the TNE school sector, and with it, the dearth of data available on this topic in the public domain. Further, the variance evidenced between differing state/territory TNE school sector offerings and models of engagement does raise the issue of possible consumer concern over parity,

Chart 1: Offshore Schools Delivering Australian Curriculum



equivalence and consistence. This could result in Australia's school based TNE initiatives being put at risk (Burgess, 2016).

As the following section on Australia's competitors shows, each state and territory's offshore provision is miniscule in comparison with global market leaders. Given this challenge, much could be gained through greater coordination and cooperation between jurisdictions, in order to achieve some economies of scale. While state and territory Curriculum Authorities will still be central, each would be helped by the development of national approaches in relation to quality assurance standards and processes, data collection and reporting, professional development of teachers, and other areas of operation where there is currently significant duplication.

National branding

Across jurisdictions there continues to be widely varying views as to the approach Australia should take with regard to its federal model of education governance and marketing. Regardless, there is a strong case for a consistent national branding for Australian Certificates of Education at Years 11 and 12 and the Australian Curriculum in earlier years. A national approach to promoting Australian Certificates of Education would highlight their quality, equivalence with onshore curriculum, ATAR eligibility, and recognition by tertiary providers in Australia and in other systems. National support, promotion and endorsement of the various certificates of education would, it seems, be welcomed. Some education stakeholders would prefer that the Commonwealth government would take the further step of developing and promoting a single Australian Certificate of Education that could be issued to students upon completion of one of the state and territory certificates.

Canada, which has a similar federal system, provides a useful model in this regard. The Canadian Information Centre for International Credentials presents provincial offerings within a coherent national framework, listing the different curricula offered internationally and identifying offshore partner schools by country, city, level of curriculum and the partner school's legal status to deliver the programmes. An Australian national directory of this kind would prove valuable for Australian Curriculum Authorities as well as assist in engaging with overseas authorities, schools and parents, who currently have very little access to reliable

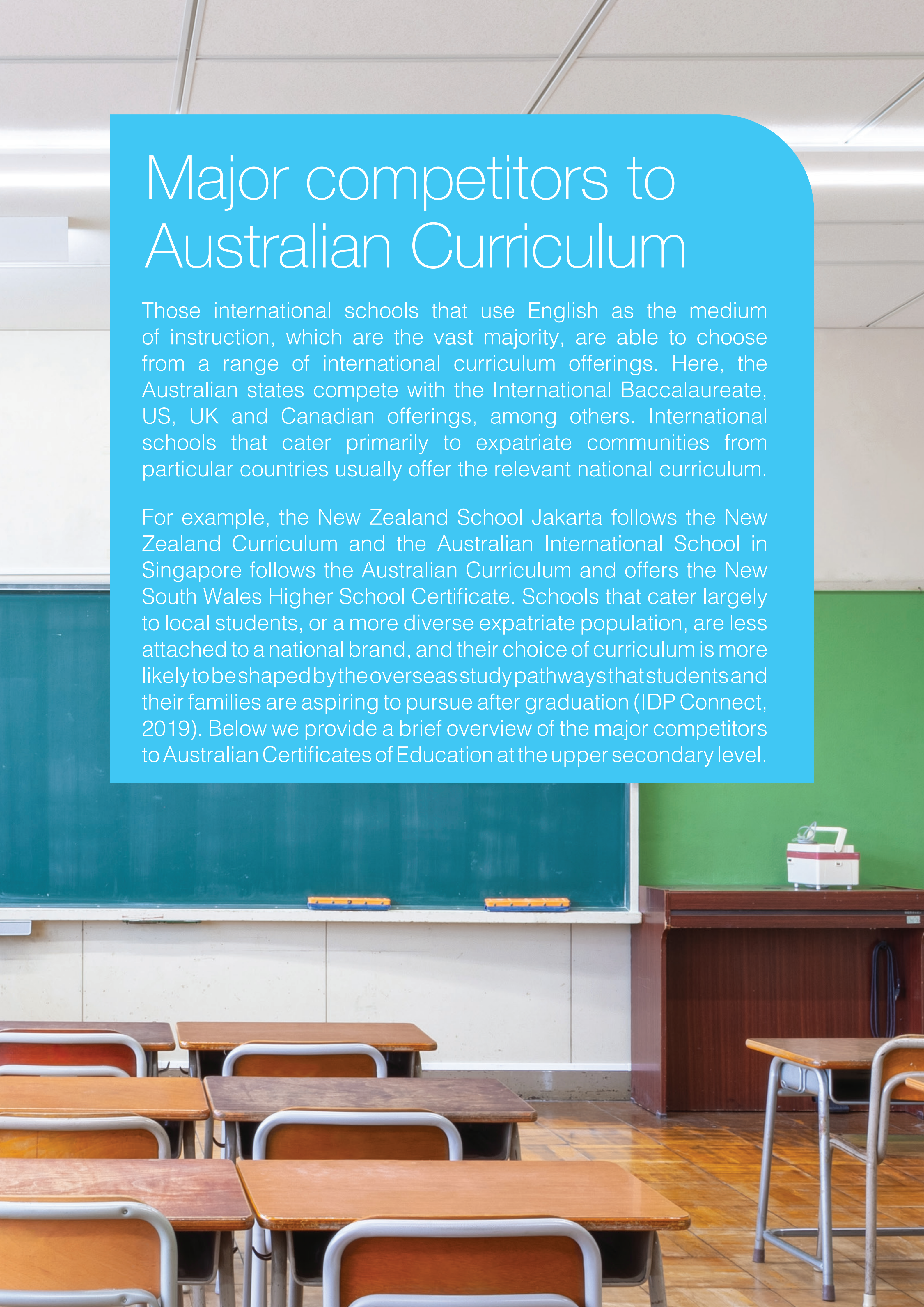
Table 3: Offshore Australian Curriculum Offerings by State/Territory and Level

YEARS	NSW		QLD		SA		VIC		WA		ACT	
	2016	2020	2016	2020	2016	2020	2016	2020	2016	2020	2016	2020
F–6		1	1	1					1			
F–10			1	2				1	1			
F–12								1				
7–10				1			1					
11–12	10	8	3	3	7	30	31	33	9	15	7	6
UNKNOWN		1	1				1					
TOTAL	10	10	6	7	7	30	33	35	11	15	7	6

information about the various state and territory models and processes, their shared features, and a simple means of identifying the offshore schools that offer Australian curriculum.

Onshore flows

There is clearly a need to further explore the nexus between school sector offshore delivery and onshore flows to tertiary education sector in Australia (Phillips & Burgess, 2016). This would enable greater capacity to track and understand cohorts that contribute to the numbers of international students studying in Australia. For all of the successes achieved in placing Australian curriculum in partner schools overseas, there is still little information accessible at a national level promoting the downstream benefits of such endeavours. This is particularly pertinent since offshore provision of Australian curriculum can be seen to be in competition with the recruitment of international students to onshore school programs in Australia as well as Foundation Studies programs offered by Australian universities or their partners (offshore and onshore). Without reliable pathways data, it is impossible to track whether offshore schooling is delivering on the ambition set out in the Australian Government's (2016) National Strategy for International Education 2025 to promote "a continuum of education and encouraging students to progress through the Australian education system, transitioning from school to higher education or vocational qualifications or between providers". While Australia still has some way to go to integrate the schools sector into our broader international education ecosystem, the collective focus should be on ensuring that the Australian schools sector provides multiple options that suit different consumers.



Major competitors to Australian Curriculum

Those international schools that use English as the medium of instruction, which are the vast majority, are able to choose from a range of international curriculum offerings. Here, the Australian states compete with the International Baccalaureate, US, UK and Canadian offerings, among others. International schools that cater primarily to expatriate communities from particular countries usually offer the relevant national curriculum.

For example, the New Zealand School Jakarta follows the New Zealand Curriculum and the Australian International School in Singapore follows the Australian Curriculum and offers the New South Wales Higher School Certificate. Schools that cater largely to local students, or a more diverse expatriate population, are less attached to a national brand, and their choice of curriculum is more likely to be shaped by the overseas study pathways that students and their families are aspiring to pursue after graduation (IDP Connect, 2019). Below we provide a brief overview of the major competitors to Australian Certificates of Education at the upper secondary level.

British Curriculum

Almost half of all international schools that use English as the medium of instruction offer a British curriculum, according to data provided by ISC Research (2021). Schools are accredited every three years by the UK Department for Education based on a voluntary inspection scheme for British Overseas Schools. This accreditation sets standards to ensure they provide the skills and qualifications needed to enter or re-enter the British education system and these ISC inspection reports are available in the public domain. An alternative quality assurance system is provided by the Council of British International Schools (COBIS) that represents 270 schools in 80 countries supporting around 167,000 students. Unlike the US education system, the British system is more reliant on standardised end-of-school assessments.

There are three key providers of curriculum for international schools aligned with the UK Curriculum, in particular the General Certificate of Secondary Education (GCSE) for 14-16 year-olds and the General Certificate of Education Advanced Level (A Levels) in the two final years of schooling. The two-year A levels is the main assessment used for university entrance (Study International, 2018). Each of these curriculum providers offers curriculum and assessment in a wide range of subjects, offering considerable flexibility to schools.

- Cambridge Assessment International Education promotes itself as the world's largest provider of international curriculum, offering programs at all levels for international schools, each aligned with the British Curriculum. Their curriculum, which includes a wide range of A Levels subjects, is used by nearly a million students in more than 10,000 schools in 160 countries.
- Pearson Edexcel also offers a suite of UK-aligned qualifications at all levels for international schools, including international A levels in 21 subjects.
- Oxford AQA delivers international GCSE and A Levels examinations across the Middle East and Asia. It is designed for students for whom English is not their first language and features curriculum and assessments that are tailored to engage local considerations.

Equivalence between these various international GCSE and A Levels qualifications and the national qualifications is assessed by the National Recognition Information Centre for the United Kingdom (UK NARIC), the UK's agency for recognising international qualifications and skills.

International Baccalaureate (IB)

The International Baccalaureate Organisation (IBO), headquartered in Geneva, Switzerland, offers the IB in over 146 countries, where it is taught by a wide range of international schools, private schools and some government schools. A feature of the program is that it has been developed independent of any governments or national system. It is widely viewed as being academically rigorous, with schools being required to undertake lengthy and rigorous assessments in order to be licenced to provide IB programs, followed by subsequent audits.

The IBO offers four programmes:

- Primary Years Programme for students aged 3 to 12
- Middle Years Programme for students aged 11 to 16
- Career-related Programme for students aged 16 to 19
- Diploma Programme for students aged 16 to 19.

The IB Diploma Programme, which is a main competitor to Australian Certificates of Education, consists of six courses structured to support multilingual learning and to prepare students to better understand differing country cultures and histories.

College Board Advanced Placement (AP) Program

This is the most common upper secondary curriculum offered in schools around the world that are branded as 'American'. The program consists of post-secondary college-level courses that provide high school students with the opportunity to gain fast-track entry and credits at most US colleges and universities. The AP coursework and exams are developed and administered by CollegeBoard.com and include 35 courses and exams in 20 subject areas, consisting of a three-year sequence of course work in a specific subject. It is available to academically minded students in Grades 10 to 12. The AP Capstone is a two-year program based on two AP courses – AP Seminar and AP Research – that focus on students developing academic skills across any discipline.

In earlier years of schooling there is a wide diversity of American style curriculum taught in American schools, as there is in the United States, where states and even districts each set their own curriculum and assessment standards. Some American schools are accredited by a US regional accrediting body and offer curriculum from a particular state. In addition, the US State Department's Office of Overseas Schools endorses some international schools as Assisted Schools, in effect deeming them suitable for the children of US citizens abroad.

Canadian Curriculum

Canada has a federal school system like Australia and the United States, with ten provinces and three territories each having their own curriculum, assessment and procedures. Like Australia, they each offer a provincial High School Diploma that allows graduates to apply for entry into post-secondary institutions across the country. The Canadian Information Centre for International Credentials (CICIC) publishes an online directory of authorised offshore schools registered by provinces and territories of Canada to offer primary and secondary curriculum outside Canada (Government of Canada, 2017). The CICIC directory lists 129 schools delivering curriculum from seven provinces. CICIC also lists the level, location and accreditation status, as well as linking to province and territory offshore school websites and resources to support student learning (CICIC, 2020).

To achieve provincial authorisation, an offshore school must employ Canadian-certified teachers, maintain adequate facilities and undergo regular inspections. Full reports of offshore audits are available in the public domain, and this transparency encourages both the Canadian licensing authorities and the offshore schools to strive for quality (British Columbia, 2021). Further details on the Canadian school export model can be found in the earlier IEAA report (Burgess, 2016).

- British Columbia has 45 Schools delivering its curriculum in eight countries (China, Colombia, Egypt, France, Japan, Korea, Qatar and Thailand), enrolling around 12,000 students
- New Brunswick, through Atlantic Education International, works with 23 offshore schools in Bangladesh, Brazil and China
- Ontario's curriculum is taught by 19 offshore schools in China, Netherlands, Japan, Malaysia, Switzerland and West Indies
- Alberta has 15 offshore schools offering its curriculum, enrolling more than 5,800 students
- Nova Scotia's curriculum is taught by 15 offshore schools in China and one in the UAE
- Manitoba has 7 offshore schools offering its curriculum
- Prince Edward Island has three offshore schools delivering its curriculum.


小心梯級
Please be careful on stairs

Opportunities for Australian Growth

In this section we provide an assessment of opportunities for Australian curriculum in 12 key Asia Pacific countries that were identified as priorities during stakeholder consultations. The methodology is based on an approach that has been used by the British Council to assess market opportunities for transnational higher education globally (McNamara & Knight, 2013). We consider three key factors: tertiary student mobility to Australia, policy and regulation, and market opportunity. We score each of these on a five-point scale, from poor (1) to excellent (5), and combine these (weighted equally) to arrive at a score for each country.

Student Mobility Ranking

Choice of foreign secondary school curriculum is influenced by young people's aspirations for future overseas tertiary study. We can gauge this factor easily by examining the number of international onshore tertiary students in Australia from each country. Table 4 above illustrates the top 12 Indo-Pacific source countries for international onshore students in Australian undergraduate degrees and vocational education and training programs.

Market Opportunity Ranking

Overviews of market conditions for international schooling in these 12 countries were obtained from a number of sources, and are included below. Each of these considers demographic factors, the number and size of international schools, domestic enrolment patterns, economic conditions that influence ability to meet private school fees, the number of existing international schools and openness to local student enrolments. For example, some of these countries have significant populations under 15 years of age who will not have an opportunity to enter Years 11 and 12 because of limited senior school places.

Table 4: International Students in Australian Undergraduate and VET Programs

	UNDERGRADUATE	VET	TOTAL
CHINA	69,259	24,091	93,350
INDIA	20,466	45,158	65,624
NEPAL	16,530	29,221	45,751
MALAYSIA	9901	13,263	23,164
SOUTH KOREA	3662	16,159	19,821
PHILIPPINES	2193	15,625	17,818
INDONESIA	6250	9654	15,904
VIETNAM	9687	5727	15,414
SRI LANKA	5840	4387	10,227
PAKISTAN	4110	6020	10,130
SINGAPORE	5129	428	5,557
BANGLADESH	2398	1088	3,486

Source: Australian Government, 2021a

Education Policy and Regulatory Environment Ranking

Host country policy and regulation is an important factor in creating the conditions in which international providers can thrive. We scored these 12 partner countries based on assessments outlined in the country profiles, interviews with Curriculum Authorities and other stakeholders and previous studies of regulatory conditions for transnational tertiary education. It should be noted that a number of countries cited are in the process of implementing or revising policy and regulation of international schools. We scored highly those systems whose regulatory frameworks are transparent, non-discriminatory and focus on ensuring quality for students. We scored down those systems in which regulations are burdensome yet do little to promote quality.

Enrolment restrictions are evident in certain countries, most commonly to limit participation in international schools to holders of foreign passports. There are signs of loosening of such restrictions to enable local students to exercise greater choice, sometimes by allowing private and government schools to offer foreign curriculum and bilingual programs alongside or instead of the national curriculum. These policy shifts have allowed for the dramatic expansion in international schooling over the past two decades, with ISC Research estimating that as many as 80 percent of international school students are now local students (Wechsler, 2017). In 2020, there were also signs of a loosening of rules governing online delivery and blended learning, in response to COVID-19 restrictions.

The scoring for these 12 countries on each criterion is presented in Table 5, below. Figure 1 presents a map of these countries, illustrating the number of international schools, and their students, along with overall market assessment. The following section of the report provides a detailed description of market conditions in each of the 12 countries. We note that while the focus here is on the largest Indo-Pacific source countries for onshore tertiary education, Curriculum Authorities also identified the Pacific Islands and Cambodia as additional growth opportunities.

Table 5: Market Assessment Scoring

COUNTRY	TERTIARY STUDENT FLOWS TO AUSTRALIA	MARKET OPPORTUNITY	EDUCATION POLICY AND REGULATORY ENVIRONMENT	TOTAL
CHINA	5	5	3	13 Excellent
INDIA	5	4	4	13 Excellent
VIETNAM	3	5	4	12 Very Good
MALAYSIA	3	3	5	11 Very Good
NEPAL	4	4	2	10 Very Good
SRI LANKA	3	4	3	10 Very Good
PHILIPPINES	2	3	4	9 Good
INDONESIA	3	4	2	9 Good
SINGAPORE	2	1	5	8 Good
SOUTH KOREA	3	1	4	8 Good
PAKISTAN	2	3	2	7 Fair
BANGLADESH	1	3	2	6 Fair

Source: Data was collated from sources that included UNESCO, World Bank, ISC, Austrade and the International Schools Database.

Figure 1: Overview of number of international schools, enrolments and recruitment potential per country in the Indo-Pacific region.

China

China has education cooperation and exchange agreements with 41 countries and sees foreign education engagement as a means to develop and strengthen the Chinese education system (China Education Centre, 2021; Council for International Education China Working Group, 2019).

Australia has certainly contributed to such development, drawing on almost 50 years of formal engagement founded on numerous education agreements and memorandums of understanding (MOU) established at federal, state, institutional and professional levels. These initiatives have undoubtedly contributed to Australia delivering its curriculum in 49 schools across first, second and third-tier cities across China. In addition, in 2019, a total of 69,259 Chinese students enrolled in Australian undergraduate degrees together with 2,491 VET enrolments.

China can claim to have the largest number of international schools in Asia, although it does impose branding distinctions to differentiate foreign and Chinese national enrolments and taught F–12 curriculum requirements. The number of international and bilingual schools has increased from 549 in 2011 to 1,028 in 2018.

Demand for places in these schools is clearly driven by factors that include middle-income affluence, the two-child policy, popularity of English as a language of instruction, blended learning that combines K–10 Chinese curriculum with Western pedagogy and breadth of curriculum content, access to foreign teaching staff and pathway provisions to foreign tertiary education.

Demand for places in these schools is clearly driven by factors that include middle-income affluence, the two-child policy and popularity of English as a language of instruction

Owing to the limited availability of international school education in China and the relative cost effectiveness of the country's domestic bilingual schools, these schools will likely be regarded by Chinese parents as a reliable pathway to foreign higher education in the longer term. Further, the uncertainty associated with COVID-19 will also likely enhance demand for such schools in the short to medium term or at least until the COVID-19 crisis is over.

China also has a rigorous regulatory framework and multiple layers of government oversight that impact on the Chinese school system in areas of market entry, quality assurance and authenticity (Council for International Education China Working Group, 2019). Nevertheless, while Australian school curricula has relatively low representation in the Chinese TNE schools market, vis-à-vis other international curricula offerings, enhanced future opportunities for TNE delivery of Australian school curricula in China do seem to be evident.

Table 6: China: International School Curriculum Engagement

POPULATION	POPULATION UNDER 25	SECONDARY SCHOOL ENROLMENTS	NUMBER OF INTERNATIONAL SCHOOLS	INTERNATIONAL SCHOOLS AND CITIES	INTERNATIONAL SCHOOL ENROLMENTS	CURRICULUM OFFERED (F–12)
1,439 million	18% under 16	84,321,859 + 349,086 (Hong Kong)	1028 international schools: • 574 China Private Schools (Blended) • 310 Foreign International Schools • 144 schools not accounted for	• Beijing (40) • Shanghai (39) • Guangzhou (47) • Hangzhou (72) • Hong Kong (18)	372,000 (66% Chinese nationals)	• UK (A levels • Cambridge (IGSCE) • American (AP) • IB Diploma • Canadian • Australian

India

The speed of change and innovation in India's education sector over recent years has been impressive. India is already recognised as one of the world's fastest growing economies.

With a large and growing young population, demand in India for quality education is increasing exponentially. Improving standards in secondary schools across the country will be vitally important if India is to make the most of its demographic dividend. COVID-19 has grounded the education system, and schools are forced to look at technology, which has been met with mixed reactions. India is preparing itself to become self-reliant economically, and for that to happen, the core foundation of "education" needs a massive overhaul in the coming years. The government in India aspires for online education and EdTech to be the new normal.

India has about 1.6 million schools, of which the Government owns and manages nearly 75 per cent of elementary, 43 per cent of secondary and 40 per cent of higher secondary schools. The remaining are privately owned and managed. The school sector in India is segmented by levels of education (pre-primary, primary, middle, secondary and senior secondary); ownership (public, private aided, private un-aided and local bodies); and education board affiliation.

At the end of 2019, there were 708 registered international schools in India, each with an average of around 440 pupils. Indian international schools cater to both foreign and local students with the most popular curriculum being British, followed by the United States and the IB. Schools are accredited by respective State Departments of School Education. There are 343 IGCSE and 110 IB schools. Indian schools follow the '10+2+3' pattern of education similar to the Australian school sector.

With a large and growing young population, demand in India for quality education is increasing exponentially. Improving standards in secondary schools across the country will be vitally important.

According to the The Asia Education Foundation, there is little engagement between the Australian schools' sector and its India counterparts (Gilbertson, 2019). Currently, no Indian schools offer the Australian Curriculum, there are few sister school relationships and minimal student exchange or other school level engagement. There is an opportunity for the states and territories to develop exchange programs with Indian schools that can contribute to an increase of Indian awareness of Australian schooling (India Reference Group, 2019). At a national level, one such example is the initiative that has involved the Australian Council for Educational Research (ACER) working with India's National Council of Education and Training (NCERT) to design, implement and report a new National Achievement Survey for students in Year 10.

Another factor of significance is student mobility, with India representing Australia's second largest source country for international student recruitment. In 2019, Australia attracted 20,446 undergraduate Indian students that will have presumably completed Years 11 and 12 school curricula in India. Additionally, a percentage of the 45,158 students that enrolled in Australia's VET programs in 2019 may also have come through an international school pipeline.

Table 7: India: International School Curriculum Engagement

POPULATION	POPULATION UNDER 25	SECONDARY SCHOOL ENROLMENTS	NUMBER OF INTERNATIONAL SCHOOLS	INTERNATIONAL SCHOOLS AND CITIES	INTERNATIONAL SCHOOL ENROLMENTS	CURRICULUM OFFERED (F–12)
1,367 million	30% under 15; 50% under 25.	133,144,371	708 registered schools with average of 440 pupils.	• Delhi • Mumbai • Bangalore • Gachibowli	314,804	• British (IGCSE) • American (AP) • IB Diploma

Nepal

Nepal is a small country of 29 million people where 50 per cent of its population is under the age of 25. Australia's relations with Nepal continue to strengthen through development cooperation and people-to-people links.

Nepalese parents view education as an investment towards the future and the students at international schools are generally from Nepal's upper middle-class or upper-class families. The recent trend in growth of international schools is due to the gradual conversion of schools into a network or chain of schools catering to a specific market segment.

Nepal has 30 schools offering IGCSE curriculum, three schools offering the IB curriculum, and one school offering the French curriculum. A major proportion of these schools are in Kathmandu, Pokhara and Lalitpur. According to the British Council (2018a), there were also 77 Nepalese schools applying for its International School Award; and the online International School Guide (no date) lists a similar number of international schools in the country. The curriculum offered tends to follow either the UK (Cambridge IGCSE and A levels), the American or the IB, with English seen to be the primary language of instruction. At this point in time, Australian school curricula currently has no representation in the TNE schools' market in Nepal.

Nepalese parents view education as an investment towards the future and the students at international schools are generally from Nepal's upper middle-class or upper-class families.

The British Council suggests that Nepal will be one of the top ten countries with the strongest growth rates in outbound mobility over the next decade, an observation not lost on Australia where a total of 16,230 Nepalese students enrolled in undergraduate degree courses and a further 29,221 enrolled in VET courses in 2019. Over 50,000 people born in Nepal now reside in Australia and the Association of Australian Nepal Alumni is particularly active, as are the Nepal–Australia Friendship societies in both countries (Australian Government, 2021b).

Table 8: Nepal: International School Curriculum Engagement

POPULATION	POPULATION UNDER 25	SECONDARY SCHOOL ENROLMENTS	NUMBER OF INTERNATIONAL SCHOOLS	INTERNATIONAL SCHOOLS AND CITIES	INTERNATIONAL SCHOOL ENROLMENTS	CURRICULUM OFFERED (F–12)
29.3 million	54%	3,463,763	77 international schools	• Kathmandu • Pokhara • Lalitpur • Panuati Kavre • Baphal • Narayansthan	N/A	• UK (Cambridge IGCSE & A Levels) • American • IB • France

Malaysia

The Malaysian Ministry of Education (MoE) Private Education Division defines an international school as a private school which offers preschool, primary and secondary school education using an international curriculum, generally with English as the medium of instruction.

These international schools – which total 142 according to the Passage to ASEAN Association (2016) – were established to cater for the needs of expatriate children living in Malaysia, however 40 per cent of the enrolled students today are Malaysian (Malaysia-Education, no date). Interestingly, there were 31,000 school sector international students drawn from 135 countries to study in Malaysia in 2016-17 (Rahman, 2016).

From a Malaysian government perspective, as a route for foreign investment into the country, there are opportunities for the Australian schools' sector to set up operations in Malaysia. However, there is evidence that many international schools have struggled to maintain healthy enrolment numbers in recent years as growth has slowed due to saturation in major Malaysian cities. In 2019, there were even a number of high-profile merger and acquisitions in the international school sector in Malaysia and it is suggested that there is a high likelihood of further consolidation amongst players in light of the impact to teaching and learning delivery (short term) and enrolment (long term) due to COVID-19 (PwC Malaysia, 2020).

Against this scenario, it is estimated that there are over 300,000 Malaysian alumni of Australian education institutions, including more than 125,000 Malaysians who have studied in Australia since 2002. Further, in the past decade, more than 7,500 Australian students undertook study or internship in Malaysia and an additional 472 students were approved prior to the impact of COVID-19 to study and/or intern in Malaysia in 2020 (Australian Government, 2021c).

As a route for foreign investment into the country, there are opportunities for the Australian schools' sector to set up operations in Malaysia.

There are also four Australian universities with a significant presence in Malaysia (Swinburne University, Curtin University, Wollongong University, and Monash University) and many other Australian tertiary partnerships established with private and public Malaysian institutions. These factors combined present a particularly strong foundation from which to further grow collaborative pathway engagement in the delivery of Australian school sector curriculum.

The international school sector curriculum approved by the MoE emanates from Britain, Australia, the USA and Canada among others. The Australian International School in Kuala Lumpur follows the New South Wales Board of Studies curriculum at all levels leading to the Year 12 Higher School Certificate (HSC). This school reports that 30 per cent of its graduates accept university places in Australia, 20 per cent enter Malaysian universities and 50 per cent enrol in universities elsewhere. Australia attracted 9,901 Malaysian student enrolments at undergraduate level in 2019 along with 29,221 VET enrolments.

Table 9: Malaysia: International School Curriculum Engagement

POPULATION	POPULATION UNDER 25	SECONDARY SCHOOL ENROLMENTS	NUMBER OF INTERNATIONAL SCHOOLS	INTERNATIONAL SCHOOLS AND CITIES	INTERNATIONAL SCHOOL ENROLMENTS	CURRICULUM OFFERED (F–12)
31.5 million	29.6% under 15	2,592,970	142 international schools	• Kuala Lumpur (77) • Kelantan (5) • Penang (14) • Johor (35) • Kedah (6) • Labuan (1) • Melaka (5) • Putrajaya (3)	71,000+ (40% local students)	• UK (Cambridge IGCSE and A levels) • US • IB Diploma • Canada • Australia • (BOSTES) HSC

Vietnam

With a population of around 96 million people of which 34 million are 24 years or younger, coupled with an economy that is reflecting rising living standards, increases in per capita income, expansion of manufacturing and service sectors, shifts to urbanisation, and importantly, the value that Vietnamese families traditionally place on education, it is little wonder that Vietnam has generated considerable interest from the international school sector.

TNE is an integral aspect of Vietnam's education provisions. In 2018, the Ministry of Education and Training (MOET) introduced new F–12 international school guidelines that:

- "encourages foreign investors in education in order to increase the number of international schools
- relaxed former limitations which restricted local enrolment within foreign-owned schools
- raised the ceiling for the rate of Vietnamese students at kindergartens, primary, secondary and high schools to 50 per cent of total enrolments" (BMI, 2019).

Against this backdrop, it still seems that around 30 per cent of students graduating from lower secondary education will not meet the standards set to gain admittance into the Year 11 and Year 12 public school system in Ho Chi Min (HCM) in 2019/20. As many as 30,000 Year 10 students will therefore be forced to seek alternative schooling arrangements that can include private or overseas schools in 2020.

It still seems that around 30 per cent of students graduating from lower secondary education will not meet the standards set to gain admittance into the Year 11 and Year 12 public school system

The revised Decree 86 released in May 2018 regulating foreign cooperation and investment in the education sector has allowed private kindergartens and schools to partner with legal and accredited educational establishments abroad. This paves the way for the Australian school sector to explore TNE partnerships with Vietnamese private schools, either through full curriculum licensing or introducing an education product or package to address quality issues in the sector. With SACE, VCE and WACE programs already delivered in Vietnam, the profile of Australian high school curriculum is recognised among many Vietnamese as a means of strengthening their reputation in the Vietnamese education system. Further, to align with the requirement for innovative teaching and learning practices, Vietnam also needs to address the demand for professional development of in-service teachers in both public and private schools.

A further development supporting private school provisions and pathways is the planned government change in the recognition of 12 years of school sector education that will come in to force in 2021. These changes will result in foreign recognised school curricula being on an equal footing with local ones and enable more students to consider the options of studying foreign programs offered in-country (Quinn, 2020).

RMIT University Vietnam was the first wholly foreign-owned institution to be registered in Vietnam and a further 39 twinning programs between 20 Australian higher education institutions and Vietnamese partners are said to be active. These pathway options to Australia's tertiary sector should be a strong incentive for further Australian TNE school sector engagement in Vietnam.

Further, in 2019 around 6,687 Vietnamese were enrolled in undergraduate studies in Australia along with an additional 5,727 VET enrolments, which underscores a growing trend for foreign offshore high school education.

Table 10: Vietnam: International School Curriculum Engagement

POPULATION	POPULATION UNDER 25	SECONDARY SCHOOL ENROLMENTS	NUMBER OF INTERNATIONAL SCHOOLS	INTERNATIONAL SCHOOLS AND CITIES	INTERNATIONAL SCHOOL ENROLMENTS	CURRICULUM OFFERED (F–12)
96 million	31%	6,818,774	123 English medium-sized schools	• HCMC 50 • Hanoi 36 • Hoi An 2 • Da Nang 3	66,062	• IB Diploma (Cambridge IGCSE) • American (AP)

Indonesia

Over the past decade, Indonesia has introduced a number of key policy reforms to improve its education system.

Moreover, 43 per cent of the country's population are below 25 years old and the middle-class population is expected to double to 140 million by 2030 (Global Business Guide Indonesia, 2018). However, access to university places is unlikely to improve until conditions and standards in the primary and secondary education sector improve.

According to an Australia-Indonesia Centre report (Rish, 2019), there are 429 registered joint co-operation schools across Indonesia of which 94 operate at senior high school level. These schools are registered to deliver foreign international curriculum through either a stand-alone arrangement or through a 'joint co-operation school', which is defined as a collaborative, not-for-profit, foreign–local partnership that must be registered locally and have Indonesian citizens on their governing board (Sebastian, et al, 2019). An example of the latter structure is the Celebes Global School in Makassar where students undertake the Celebes Global School curriculum that integrates the Indonesian Curriculum, Western Australia curriculum, and the International Institute of Business and Technology (IIBT) Foundation program. Students graduate with the Indonesian National Certificate as well as a Foundation Certificate from IIBT that enables direct entry into undergraduate degree programs in Indonesia as well as formal articulation provisions with six Australian universities (SMA Celebes Global School, 2019).

> Access to university places is unlikely to improve until conditions and standards in the primary and secondary education sector improves.

Currently, the Education and Culture Ministerial Regulation No. 31 Year 2014 stipulates that accredited foreign schools must form a joint cooperation with an Indonesia counterpart in order to operate in Indonesia.

As The Indonesia-Australia Comprehensive Economic Partnership Agreement (IA-CEPA) entered into force on 5 July 2020, there are expectations of further opportunities to expand pathways and partnerships through the provision of Australia's school sector curriculum partnering with Indonesian schools.

At this time, the Australia Awards program for Indonesia is the largest and longest running scholarship program of its kind offered by the Australian government and it is the links that result between schools and school curriculum, student and staff exchanges, and scholarships that can strengthen education ties between Australia and Indonesia. Organisations engaged in supporting such relationships include the Australia-Indonesia Institute, Australia-Indonesia Centre and the Australia-Indonesia Youth Association. It is with the support of such entities and the role played by the wider Australian education sector that Australia already benefits from being the top destination for Indonesian students studying abroad. This is reflected in 6,250 undergraduate and 9,654 VET enrolments in Australia in 2019. However, it should also be noted that enrolment data from the Department of Education, Skills and Employment reveals that there were only 199 Indonesian student school-level enrolments in Australia in December 2019, suggesting that parents may wish to keep their children at home during secondary school attendance.

Indonesia has the largest number of schools offering international curricula (IB, Cambridge- IGCSE, NCUK) across the ASEAN region although very few private schools deliver Australian state and territory curriculum. These include the Australian Independent School, Sekolah Cita Buana and IPEKA Integrated Christian School. On the other hand, there are many Australia–Indonesia sister school arrangements.

Table 11: Indonesia: International School Curriculum Engagement

POPULATION	POPULATION UNDER 25	SECONDARY SCHOOL ENROLMENTS	NUMBER OF INTERNATIONAL SCHOOLS	INTERNATIONAL SCHOOLS AND CITIES	INTERNATIONAL SCHOOL ENROLMENTS	CURRICULUM OFFERED (F–12)
267 million	43% (27.3% under 15)	24,893,570	192 English Medium Schools, 429 registered joint co-operation schools (94 senior high school level)	• Jakarta 48 • Bali 13 • Surabaya 14 • Bandung 6 • Medan 3 • Kalimantan 2 • Makassar 3	59,600	• IB Diploma • British (IGCSE) • American (AP) • Australian • New Zealand

Sri Lanka

The Sri Lankan government has an overarching drive for the country to achieve credible standing as an education hub in the region. The Ministry of Education has secured significant World Bank/Asian Development Bank/IDA funding to develop technology laboratories and enhance computer literacy within Sri Lankan schools to improve access and equity to enhance teaching standards and teaching proficiency.

During the school years, English is generally taught as a second language with the main language medium being Sinhala or Tamil.

The Sri Lankan international school sector is likely to face regulatory transition, with new powers required to monitor and regulate international schools being granted to the Ministry of Education according to The Sectoral Oversight Committee on National Security (Mallawaarachchi, 2020). There were 9,931 government schools, 110 government-approved private and assisted schools as well as a wide range of international schools in 2018 (Sri Lanka Government, 2020). These schools can offer either the local syllabus or follow the British system but those students who have undertaken the British examination system through their schooling years are not permitted to apply for Sri Lanka university admission.

In 2019, over 1.7 million school-aged children were enrolled in both government and private schools. The secondary school education system follows the General Certificate of Examination (GCE) Ordinary Level and Advanced Level exam curriculum administered by the Ministry of Education.

The Sri Lankan international school sector is likely to face regulatory transition, with new powers required to monitor and regulate international schools being granted to the Ministry of Education

Approximately 300,000 students sit for the GCE O/Level examination, with around 250,000 progressing onto the GCE Advanced Level. In 2017 and 2018, a total of 163,160 GCE A/Level graduates sought to gain a Sri Lanka university place but only 19 per cent were successful in gaining entry to one of the country's 15 universities or other Sri Lanka institutions of higher education.

Such findings have prompted 23 Australian education providers to establish operations in Colombo and elsewhere in recent years and these institutions provide realistic pathway opportunities for the delivery of Australian school sector curriculum (Australian Government, 2021d). One example is Swinburne University that offers pathway diplomas to its campuses in either Malaysia or Melbourne. VCAA also advises that VCE will be introduced at Ladies College Colombo from 2021.

Quality concerns – as well as overcrowding in competitive urban schools – have recently also spurred increasing demand for education in Sri Lanka's growing number of private schools. There are more than 200 international schools in Sri Lanka, 25 of which have recently organised themselves as The International Schools of Sri Lanka (TISSL). These schools claim to enrol 40,000 or more students and according to the article in the Daily FT in May 2020, the 200 international schools together provide an additional 12,000 enrolment places per year (Daily FT, 2019).

A total of 5,480 undergraduate and 4,387 VET students enrolled in Australian tertiary programs in 2019. Introducing an Australian curriculum for secondary school years in Sri Lanka would certainly afford the competitive edge of tapping the cohort expected to enroll in the Australian higher education sector either through a pathway program or as a direct-entry international tertiary student.

Table 12: Sri Lanka: International School Curriculum Engagement

POPULATION	POPULATION UNDER 25	SECONDARY SCHOOL ENROLMENTS	NUMBER OF INTERNATIONAL SCHOOLS	INTERNATIONAL SCHOOLS AND CITIES	INTERNATIONAL SCHOOL ENROLMENTS	CURRICULUM OFFERED (F–12)
21.5 million	38% (25% under 15)	2,727,965	200 (25 international schools have formed The International Schools of Sri Lanka)	• Colombo 31 • Kandy 13 • Galle 3 • Rathnapura 9	52,000+	• GCE (Edexcel) • Cambridge • IGCSE • IB Diploma

Singapore

TNE opportunities for international schools and foreign school curriculum in Singapore are limited although there may be options for new entrants to enter the market for mid-priced international schools or in the preschool segments.

TNE opportunities for international schools and foreign school curriculum in Singapore are limited although there may be options for new entrants to enter the market for mid-priced international schools or in the preschool segments. According to ISC Research (2020), there are 110 international schools in Singapore, enrolling more than 63,000 students. The British curriculum is the most popular, covering about 33 per cent of the market share, followed by the IB at 29 per cent. However, out of all the international schools, fewer than 20 have enrolments beyond 1,000 students.

While Singaporeans are not permitted to enrol in international schools unless they have special approval there is significant expatriate and presumably international student demand.

The success exhibited by the international school market in Singapore seems to be driven by the Programme for International Student Assessment (PISA) global standardised results that reveal that Singapore has some of the highest achieving students in the world when it comes to reading, mathematics and science. In addition, Australia's tertiary presence in the country is very visible. Tertiary institutions – James Cook University, the University of Wollongong, the University of Newcastle, the University of Adelaide, Monash University, The University of Sydney, RMIT, Deakin University among others – have all contributed to the strength of the regional push/pull relationship that promotes and supports demand for excellence in secondary school education. James Cook University is the only Australian institution in Singapore to be recognised as a 'university' at this time.

Singapore students accounted for 5,129 students that enrolled in Australia's undergraduate degree programs in 2019 and more than 2,100 Australian students have studied and undertaken internships in Singapore under the New Colombo Plan (2014–2019) (Australian Government, 2021e).

Table 13: Singapore: International School Curriculum Engagement

POPULATION	POPULATION UNDER 25	SECONDARY SCHOOL ENROLMENTS	NUMBER OF INTERNATIONAL SCHOOLS	INTERNATIONAL SCHOOLS AND CITIES	INTERNATIONAL SCHOOL ENROLMENTS	CURRICULUM OFFERED (F–12)
5.6 million	30%	171,319	110 international schools	N/A	63,000	• IB Diploma • British IGCSE and A Level • American AP

Pakistan

Education in Pakistan is fairly developed and comprehensive but suffers from a variety of disparity issues according to Expat Quotes (2021). With a population of 212 million and 64 per cent under the age of 30, the socio-economic and gender disparities that exist in regions have a major impact on education access and educational outcomes.

Pakistan consists of four provinces: Sindh (capital, Karachi); Punjab (capital, Lahore); Khyber Pakhtunkhwa (formerly the North-West Frontier Province) (capital, Peshawar); and Baluchistan (capital, Quetta). Islamabad is a special 'Federal Capital Territory' and the provincial education departments have responsibility for administration over elementary and secondary education.

The basic education system in Pakistan is organised on the basis of "2+8+4" (two years of pre-primary; eight years of elementary and middle; and four years of secondary and higher secondary, higher secondary, intermediate schooling). It should also be noted that the government in Pakistan is currently working to establish a single streamlined education curriculum system that can be applied across the country.

Pakistan's Education Commission oversees 174 private and public schools that enrol both local and international students. Most of these schools are located in Islamabad, Lahore and Karachi, and many are private prestigious boarding schools with English as the language of instruction. In addition, international private schools offer alternative qualifications maintained by international examination boards. The most common alternative is the General Certificate of Education (or GCE), where SSC and HSSC are replaced by Ordinary Level (or O level) and/or A Level, respectively. Such factors obviously play on Pakistan's international student mobility figures that UNESCO records as 52,000 in 2019.

Australia has a longstanding relationship with Pakistan that can be measured in the 61,000 Pakistan-born people living in Australia (according to the 2016 census) and the 4,110 Pakistan students who enrolled in undergraduate degrees in Australia in 2019 plus a further 6,020 students who entered the VET sector (Australian Government, 2021f).

Table 14: Pakistan: International School Curriculum Engagement

POPULATION	POPULATION UNDER 25	SECONDARY SCHOOL ENROLMENTS	NUMBER OF INTERNATIONAL SCHOOLS	INTERNATIONAL SCHOOLS AND CITIES	INTERNATIONAL SCHOOL ENROLMENTS	CURRICULUM OFFERED (F–12)
212 million	64% (under 30)	13,357,618	174 private and public schools	• Islamabad • Lahore • Karachi	N/A	• IB Diploma • British (Cambridge IGCSE) • American (AP)

South Korea

With a population of 51.64 million, South Korea has 9 provinces and 6 key metropolitan cities. According to the World School website dated September 2019, there were 6 international schools with English as the language of instruction plus a further 40 foreign schools of which 26 schools teach in English.

The International Schools Database suggests that there are 21 international or foreign schools in Seoul, and a further 4 schools on the island of Jeju (International School Database, 2021). The expat schools South Korea database lists a total of 32 F–12 international and foreign schools in South Korea that offer a diverse range of curricula (Expat Schools Korea, 2021).

Foreign schools are those that predominantly enrol "foreign" students, with a 30 per cent quota set against ethnic South Korean enrolments. This quota is framed around a requirement that the Korean applicant must have lived abroad (outside South Korea) for a period of three or more years in order to qualify for the Korean certified high school diploma. International schools are seen as being predominantly open to anyone who can pay the tuition fees. Combined, these schools offer a variety of curricula including American, British, German, Canadian, IB, Advanced Placement credits, and others.

Australia and Korea share a strong history of collaboration in education and research. Australia also has approximately 200 sister school-to-school arrangements and over 10,000 students are reported to study Korean as a foreign language in Australian schools and universities, according to Department of Education, Skills and Employment data. In 2019, a total of 3,662 South Korean students enrolled in an Australian university undergraduate degree and a further 1659 students entered an Australian VET program.

Table 15: South Korea: International School Curriculum Engagement

POPULATION	POPULATION UNDER 25	SECONDARY SCHOOL ENROLMENTS	NUMBER OF INTERNATIONAL SCHOOLS	INTERNATIONAL SCHOOLS AND CITIES	INTERNATIONAL SCHOOL ENROLMENTS	CURRICULUM OFFERED (F–12)
51.61 million	25% under 24; 13% under 14	2,148,364	• 40 foreign schools • 6 international schools (4 Jejudo; 1 Incheon; 1 Daegu)	• Seoul 21 • Jejudo 4 • Busan Daegu & Ulsan 8 • Daejeon & Gwangju 1 • Suwan 1	N/A	• German • French • IB Diploma • British (IGCSE) • Japanese • American (AP) • Canadian

Bangladesh

The Bangladeshi education system is one of the largest in the world with 21.9 million children in kindergartens and primary schools. With a population of around 156.6 million, where a third is under 16 years of age and only 5 per cent have the opportunity to achieve a secondary education, education opportunities can be said to be limited.

Most private schools in Bangladesh teach in English and offer British qualifications, such as IGCSEs, O Levels, A Levels and the Cambridge Pre-U. Some serve as recognised centres for exam boards operating in the country, such as Edexcel and Cambridge International Examinations and many leading schools are members of the Dhaka International Schools Association, which aims to promote professionalism and share best practice. Accrediting bodies active in Bangladesh include the Council of International Schools, the Council of British International Schools and the New England Association of Schools and Colleges.

Australian aid is currently being deployed towards assisting Bangladesh's primary education sector, which is aimed at improving literacy, numeracy and future employability. Australia is also providing assistance with what is termed "second-chance education" that supports children who have dropped out or never enrolled in school. Beyond these initiatives, Australia provides a number of scholarships that are discipline focussed and directed at engineering, public health, transport and public policy (Australian Government, 2021g).

In addition to the benefits of aid, the shared strong sporting interests has played an important role in fostering Australia–Bangladesh relations. Such interests are likely to have already contributed to the positive awareness of Australia's standing as a nation offering quality education. Two Australian schools already operate in Bangladesh and an Australian university is currently investigating the establishment of campuses in Dhaka and Chittagong.

In 2019, a total of 2,398 Bangladesh students enrolled in Australia in an undergraduate degree and an additional 1,088 students enrolled in VET programs.

Table 16: Bangladesh: International School Curriculum Engagement

POPULATION	POPULATION UNDER 25	SECONDARY SCHOOL ENROLMENTS	NUMBER OF INTERNATIONAL SCHOOLS	INTERNATIONAL SCHOOLS AND CITIES	INTERNATIONAL SCHOOL ENROLMENTS	CURRICULUM OFFERED (F–12)
157 Million	49% under 24; 35% under 15	15,869,820	160+ English medium international schools (many are multi-campus)	• Dhaka • Chittagong • Gulshan • Banani • Baridhara	N/A	• Pearson Edexcel • IGCSE • IB Diploma • Canadian • Australian

Philippines

The Philippines is home to just over 100 million people, half of whom are under the age of 25. By 2030, it is forecast that Manila will have around 17 million people. The official languages of the Philippines are Filipino and English, with English as the medium of instruction at public universities across the country.

The Philippines government has been strengthening its F–12 transition to tertiary education initiatives such as the 'Programmes in Pathways' scheme that is directed at schools and individuals to help young students prepare for university studies. However, the quality of the teaching and learning, together with the support resources and facilities still remains low by Asian standards. The British Council indicate that the Philippines may be the next TNE hub, "building on a growing youth population, a growing economy, a growing demand for higher education enrolment, and widespread use of English" (British Council, 2018b). What also seems to be known is that key buyer behaviour factors influencing international school education enrolment choice in the Philippines include the "international" brand name, the language of learning, and the international examinations imposed (Gaskell, 2017).

In 2017, there were 64 English-medium international schools in the Philippines enrolling 27,600 children (Education International, no date). These schools all need to comply with the rigorous regulatory framework that guides the construct and conduct of Philippine private schools.

There are an estimated 30 TNE programs between Australian and Philippine tertiary providers. Undergraduate programs delivered in articulation with a Philippine higher education institution are attractive because of the couple of years' savings in living costs in an international destination.

In 2019, 2,193 Philippine students enrolled in Australia to undertake undergraduate degree studies and an additional 1,525 students enrolled in VET programs. It is also worth noting that 304,022 Australians are identified as having Filipino ancestry (Australian Government (2021h).

Table 17: Philippines: International School Curriculum Engagement

POPULATION	POPULATION UNDER 25	SECONDARY SCHOOL ENROLMENTS	NUMBER OF INTERNATIONAL SCHOOLS	INTERNATIONAL SCHOOLS AND CITIES	INTERNATIONAL SCHOOL ENROLMENTS	CURRICULUM OFFERED (F–12)
107 million	50%	9,007,148	64 English-medium International schools	• Manila metro 34 • Luzon province 20 • Vasayas province 6 • Mindanao province 4	27,600	• American AP (23%) • IGCSE (38.5%) • IB Diploma (38.5%) • Korean • Japanese

Conclusion: Gazing into the Crystal Ball

There is little doubt that the experience of COVID-19 will reshape international education demand and patterns of provision. Post COVID-19, Australia's curriculum providers, together with 103 offshore partner schools across Asia and further afield, will implement strategies that fine-tune or adjust management practices, delivery modes and curriculum offerings. This is likely to occur to best address risks related to recruitment, attrition, finance, technology, and staffing.

The return to Australia of many Australians working in Asia during the pandemic has posed challenges for those schools that cater to expats and those that employ Australian teachers. This situation will likely resolve somewhat over 2021 as conditions allow people to return to international postings, but there could be an ongoing downturn in the number of Australians working in the region due to heightened perception of risk and the rapid adoption and acceptance of remote working. Meanwhile, those schools catering primarily to local students may have been able to attract students who would otherwise have travelled to study onshore in Australia or New Zealand. Such impacts are very difficult to assess in the absence of consistent data collection, sharing and reporting by Curriculum Authorities.

Lockdowns around the world demonstrated the importance of online learning capability, including the use of learning management systems, the availability of digital learning resources, and the ability of teachers to work effectively online. Some of the larger competitors to Australian curriculum, such as the International Baccalaureate, were able to use their extensive online platforms and existing online support services to help schools manage the transition to online operations. Australian Curriculum Authorities, by contrast, do not provide any significant online curriculum or support, since these are organised at the school level in Australia, and by individual offshore schools.

One of the most notable changes since the publication of the IEAA's previous report on offshore schooling has been the growth in provision in China. Nearly all of the new schools that began offering Australian curriculum over the past four years are in China. But with the deteriorating political relationship between China and Australia, coupled with increasing levels of state control of international businesses, we expect to see significantly less appetite for expansion by Australian providers until the situation improves. Australian curriculum providers may well consider expanding partnerships in other countries where there is an existing flow of international tertiary students to Australia and where international collaboration is welcomed as a means to support the partner country's economic and societal development.

These current headwinds highlight the need for greater national coordination. Australia is a very small and fragmented player in a very large market that is dominated by a small number of competitors. Our federal model, which often pits states and territories against each other, is hampering our ability to compete at scale. While recognising that states and territory Curriculum Authorities will continue to be central, a step-change is required in order to grow market share. A national strategy that promotes a coordinated and cooperative approach is needed.

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