



Education & Skills

2025-26 Sector Plan



Australian Government

Australian Trade and Investment Commission

STRATEGY OVERVIEW

VISION: *Defend Australia’s market position and grow preference for Australia as the global education partner of choice*

KEY
SUB-SECTORS

Recruitment
(incl. Higher Education, VET & Skills, Schools)

Transnational Education
(incl. Higher Education, VET & Skills, Schools)

PRIORITY
MARKETS



VIETNAM



CHINA



PHILIPPINES



INDIA



INDONESIA

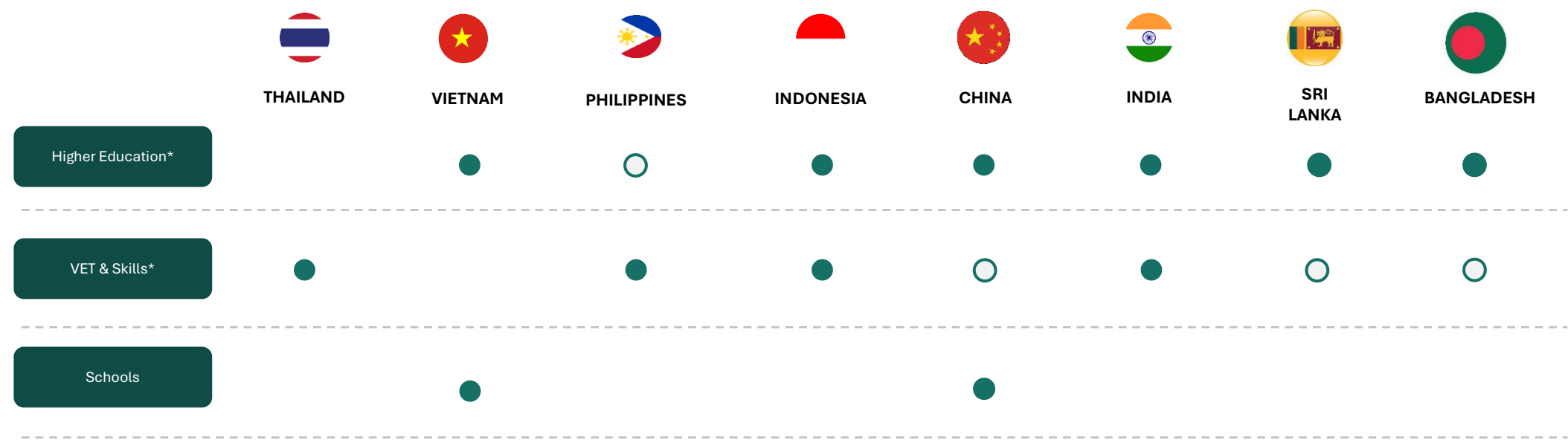


UAE



THAILAND

STUDY IN AUSTRALIA PRIORITIES: ONSHORE RECRUITMENT



Priority markets for foreign scholarship programs include: Indonesia, Saudi Arabia, UAE, Kuwait and Colombia

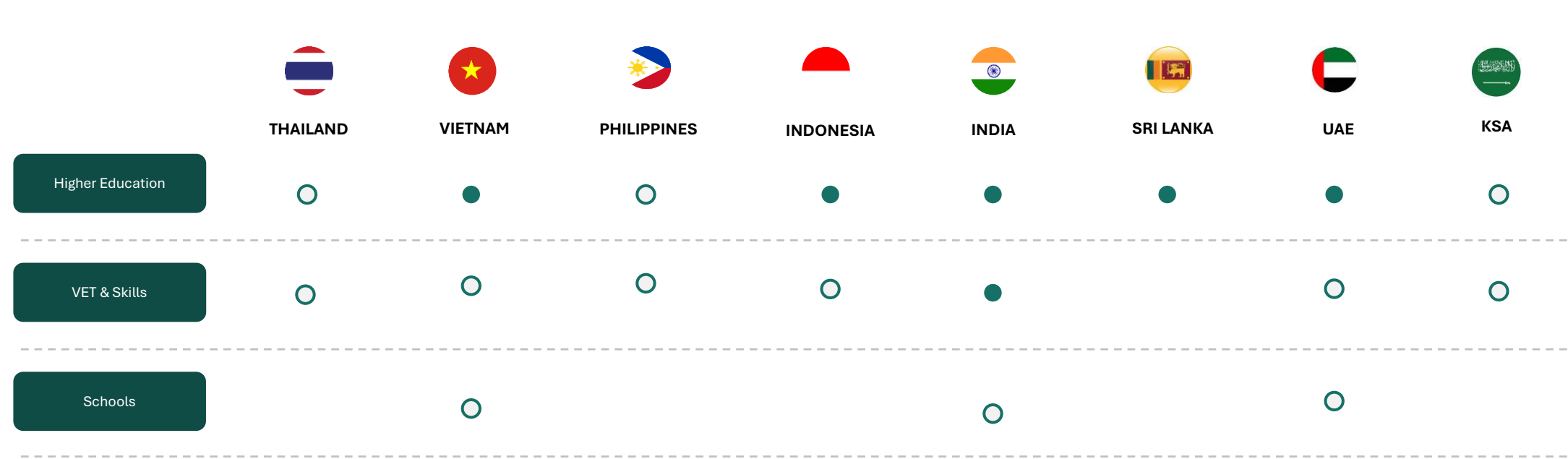
* Includes recruitment opportunities for packaged ELICOS programs

ESTABLISHED

DEVELOPING

See **SLIDE 7** for mapping of global focus

STUDY WITH AUSTRALIA PRIORITIES: TRANSNATIONAL EDUCATION



Priority markets with existing TNE branch campuses: Malaysia, Singapore, Indonesia, Vietnam, India, Sri Lanka, UAE
To support intra-regional student mobility from: Japan, Korea, China, India, Kenya and Nigeria

ESTABLISHED DEVELOPING

See **SLIDE 7** for mapping of global focus

KEY GLOBAL EVENTS

Event Name	Market/s	Event Type	Sub-sector	Month
QUARTER 1 (July to September 2025)				
PIE LIVE Asia Pacific, Gold Coast	Global	Asia-Pacific industry conference	HE	29-30 July
CIFTIS	China	Trade in Services Fair	All sectors	10-14 September
Study Australia Fair	Mongolia	Recruitment fair	All sectors	13 September
Study Australia Fair	Taiwan	Recruitment fair	All sectors	19-21 September
QUARTER 2 (October to December 2025)				
Expo: Australian Global Campuses	Osaka, Japan	World Expo 2025	HE	8 October
AIEC Canberra	Global	Australian industry conference	All sectors	14-17 October
Vente Australia	Mexico, Colombia, Chile	Recruitment fair	All sectors	25 Oct – 4 Nov
DIDAC Mission (SABX)	India	Trade event (DIDAC) and mission	Edtech, VET/Skills	17-21 November
Global Agent Week	Global	Virtual event series	All sectors	25-27 November
QUARTER 3 (January to March 2026)				
Australia Week TNE Mission (SABX)	India	Trade events (QS/PIE Live) and mission	HE	1-6 Feb
APAIE	Hong Kong	Asia-Pacific industry conference	HE	23-27 February
Advanced TNE Mission (SEABX)	Philippines	SEABX Mission	HE, VET/Skills	18-19 March
Digital Skills Roadshow (SEABX)	Vietnam, Indonesia, Thailand, Philippines	Industry-aligned recruitment fair	HE, VET/Skills	March
Festival of Australia (SABX)	India , Bangladesh, Sri Lanka (5 cities)	Recruitment fair (with Premium Food)	All sectors	March
QUARTER 4 (April to June 2026)				
Study Australia Fair + Roadshow	Korea	Recruitment fair and Roadshow	All sectors	16-19 May
Study Australia Fair	Japan	Recruitment fair	All sectors	23 May

FOCUS OF GLOBAL TEAM

Region	Market	Recruitment	TNE	Scholarships
AMERICAS	Brazil			
	Mexico			
	Peru			
	Chile			
	Colombia			
MAINLAND CHINA, HONG KONG & TAIWAN	China			
	Hong Kong			
	Taiwan			
MIDDLE EAST, AFRICA & PAKISTAN	United Arab Emirates			
	Saudi Arabia			
	Kenya			
NORTHEAST ASIA	Japan			
	South Korea			
	Mongolia			
NEW ZEALAND & PACIFIC	Papua New Guinea			
SOUTHEAST ASIA	Vietnam			
	Indonesia			
	Thailand			
	Malaysia			
	Philippines			
	Singapore			
SOUTH ASIA	India			
	Sri Lanka			
	Bangladesh			

ESTABLISHED

DEVELOPING



Australian Government

Australian Trade and Investment Commission

AUSTRALIA



Australian Government

Australian Trade and Investment Commission

South Asia Update

Vik Singh

Trade & Investment Commissioner, South Asia



Australian Government
Australian Trade and Investment Commission



Mr. Vik Singh
Trade Commissioner - South Asia



Ms. Neha Grover
Senior Director - India

Study In
International Student Recruitment

Study With
Transnational Education

Priority Programs
Future Skills & Executive Education

Greater South Asia
Bangladesh & Sri Lanka

Education Directors Across South Asia



Sharath Nambiar
Director



Kavitha Vijayavelan
Director



Mahnaaz Khan
Director



Pooja Iyer
Director



Tanya Koshy
Director



Kamal Rabha
Director



Smriti Sharma
Director



Liza Powell
Director



Shreya Singh
Director



Piyush Awasthi
Director



Mostafizur Rahman
Senior Director -
Bangladesh



Sandi Seneviratne
Director - Sri Lanka

South Asia – Education Landscape



Demographic
advantage



Economic
growth



Demand for
quality education



Growth in International
Student Mobility



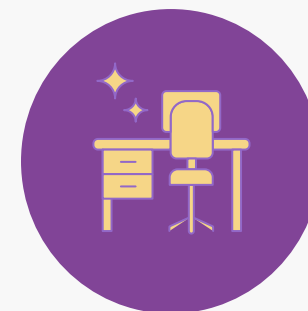
Expanding higher
education systems



Challenges in
quality and access



Shift towards
digital and online
education



Focus on
employability and
skill education

Regional Spotlight

(India)



India's Economic Outlook

Key economic indicators driving the Indian Economy.



Real GDP growth (2023-24): **7.6%**
(as per NSO & NITI Aayog)



Nominal GDP (2024): Approx. **\$4.2 Trillion**



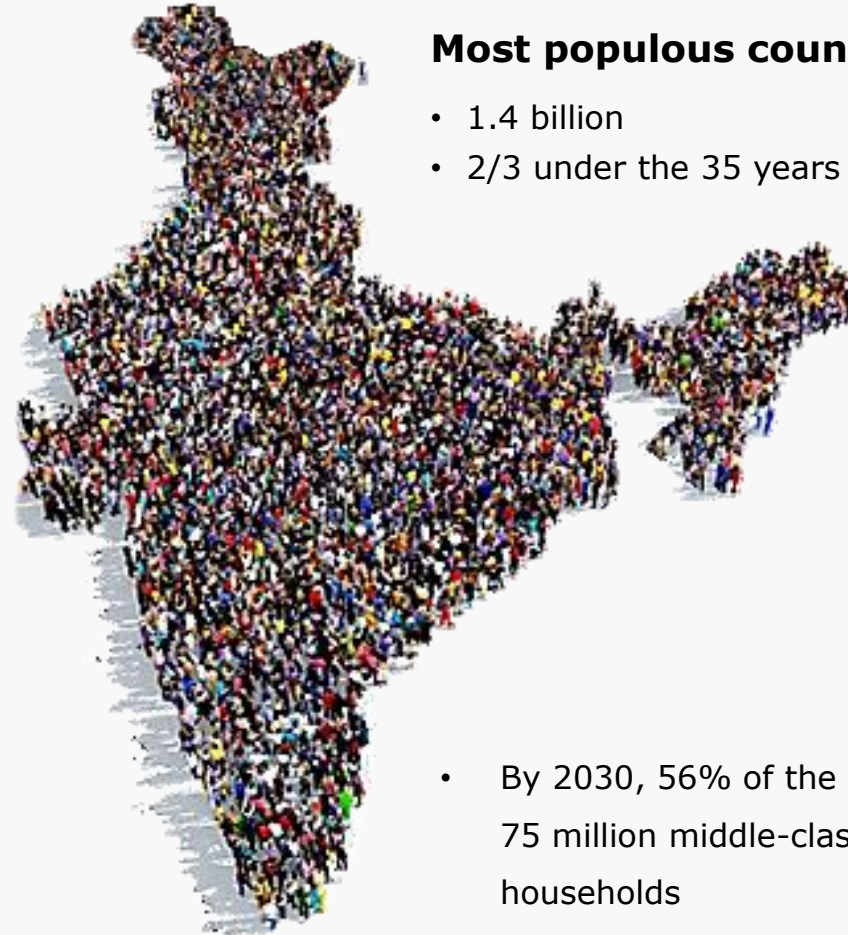
Projected GDP for 2027: **Expected to cross \$5 Trillion and become third largest economy**



Share in Global GDP: **~3.6%**



Contributors GDP: **Services (53%), Industry (25%), Agriculture (17%)**



Most populous country

- 1.4 billion
- 2/3 under the 35 years of age
- Upward income mobility will drive consumption
- Transformation into a powerhouse of tech-driven talent
- ~ 2.5 Mn graduates in the STEM stream
- By 2030, 56% of the population will include 75 million middle-class and 25 million rich households

India's higher education system



One of the largest in the world

- India accounts for 25% of the world's student population.
- 58,000 higher education institutions
- 43.3 million students enrolled for higher education
- Over 1.33 million Indians were studying abroad by 2024
- Indian students spending is expected to grow to US\$70 billion by 2025 from US\$47 billion in 2022
- Rising middle class is driving demand for quality education
- India's education budget has increased by over 6% since last year - ₹1,286,500 million.
- Focus on digital technology & internationalization

Trends in student mobility

- **Diversification of destinations** – the traditional "big four" remain central but countries such as Germany, Netherlands, France and Japan are growing market share.
- **Post study work and employability** – Work rights is a key factor and countries tweaking these rules see immediate effects.
- **Policy-led volatility** – Recent visa/policy changes and stringer compliance checks are creating short term drops or re-routes of students between destinations.
- **Evolving subject preferences** – growing demand in STEM fields followed by business and finance. Rising interest in AI, cybersecurity, health sciences and sustainability related programs, reflecting India's focus on employability.
- **New models** – online, micro-credentials and transnational education are complementing campus mobility, expanding options for scale and cost sensitive students.



Transnational Education

Key drivers of growth	Transformational Policy Push	Bilateral Alignment	Australia-India Transnational Education Models
Demographic Advantage & Scale - 40M+ students enrolled today; millions more entering annually - India = 25% of global student population Rising middle class and demand for high quality education Skills Gap and Employability	NEP 2020 targets 50% Gross Enrolment Ratio (GER) by 2035 (from 28%) Economic Survey 2024–25 calls for doubling educational infrastructure ‘Internationalisation at Home’ to: → Retain talent & attract global learners → Foster cross-border research & innovation UGC to allow 15 foreign university campuses in India by 2025–26	Education identified as focus sector in Australia Government’s A New Roadmap for Australia’s Economic Engagement with India Australia’s Education Strategy for India looks to strengthen education delivery to bolster India’s education reform agenda and enhance innovative partnerships to strengthen Australia and India’s higher education capabilities. 450+ active Australia-India academic & research partnerships	Dual/Joint/ Twinning Degrees Diploma to Degree Pathways Online Delivery Quality Assured Awards Branch Campuses Joint Academies Global Centre School-to-University Pathways

Australian Transnational Education (TNE) perceptions in India

The Australian Trade and Investment Commission (Austrade) commissioned Voyage to undertake a comprehensive study into Indian student perceptions of Australia's transnational education (TNE) offerings. Conducted in early 2025 (data spanning from March 2023 to March 2025)

- **Employability** remains the foremost priority-visibility into post-study outcomes.
- **Affordability** continues to be a significant concern.
- **Hybrid and onshore transition models** are positively received yet lack clarity in implementation.
- Students seek detailed **guidance** on credit transfer, visa policies, and career support.
- **Institutional credibility** is paramount.
- Australian TNE programs are sometimes viewed as lesser alternatives unless backed by **prestigious partners**.
- Untapped regional markets show high growth potential, especially in states such as **Telangana (beyond Hyderabad), Odisha, Rajasthan, and Uttar Pradesh**.
- These areas align with Australia's strengths in **technology, tourism, engineering, and innovation**



Foreign Universities in India

Australian Branch
campuses and **Global**
Centres in India



Foreign Branch Campus Plans Announced

GIFT City, Gujarat

- Coventry University (UK)
- University of Surrey (UK)
- Queen's University Belfast (UK)

Mumbai, Maharashtra

- University of Western Australia (Australia)
- University of York (UK)
- University of Aberdeen (UK)
- Illinois Institute of Technology (USA)
- IED Istituto Europeo di Design (Italy)
- University of Bristol (UK)

New Delhi / Noida/ Gurugram (NCR)

- University of Southampton (UK)
- Western Sydney University (Australia)
- Victoria University (Australia)

Bengaluru, Karnataka

- La Trobe University (Australia)
- University of Liverpool (UK)

Chennai, Tamil Nadu

- University of Western Australia (Australia)

Foreign Branch Campuses Established

GIFT City, Gujarat

Deakin University (Australia)
University of Wollongong (Australia)

Employability

Foreign Higher education institutions focus and expertise in Data Science, aligns with **India's booming IT market**, preparing graduates for **roles in analytics, fintech, STEM and AI technologies**.

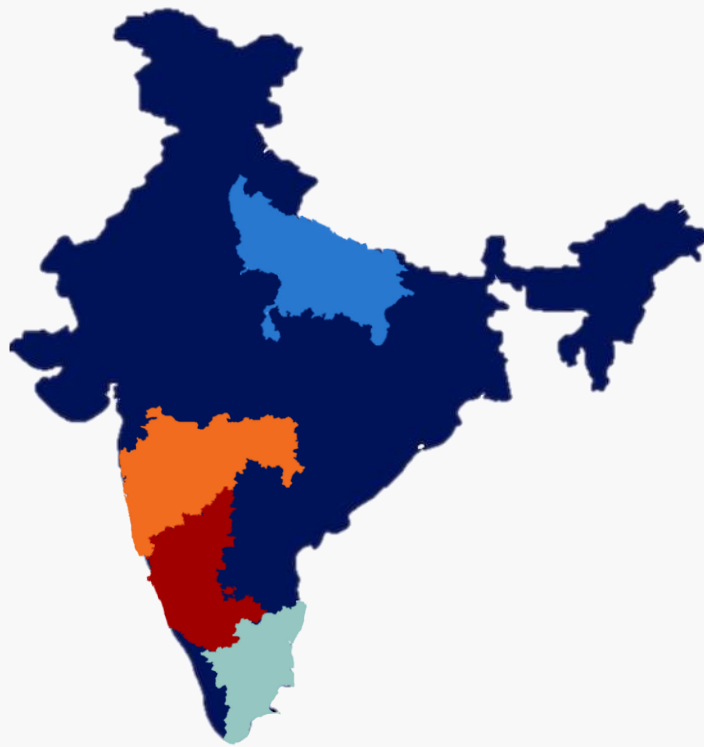
International Branch Campus in India - Regulations

Currently there are 2 options for setting up IBCs; GIFT City regulations in 2022 & UGC Guidelines released in 2023 provide the enabling framework

Feature	IFSCA Regulations 2022	UGC Regulations 2023
Overview	Enables FHEIs to establish IBCs and OECs at GIFT City, Gujarat	Regulates entry and operations of FHEIs setting up campuses across India
Eligible Institutions	Foreign university must be within the top 500 in global overall or subject rankings (QS) or be a reputed institution in the home country.	Foreign HEI must be within the top 500 in global overall or subject rankings as decided by UGC or be a reputed institution in the home country.
Discipline	Financial Management, FinTech, Science, Technology, Engineering, and Mathematics. The course to be offered by IBC or OEC shall be identical in all respects as the Parent Entity at home	UG, PG, doctoral, post-doctoral, and other programs in all disciplines can be conducted.
For-Profit Status	Parent entity permitted to repatriate profits without any restrictions.	Repatriation of funds is permitted in accordance with prevailing Indian exchange control laws.
Online Learning	The regulation is silent on this aspect.	Online and distance learning modes are not permitted. Program delivery must be in a conventional mode.
Foreign Exchange	Fees must be charged in foreign currency; administrative expenses may be met in INR.	Cross-border movement of funds and maintenance of foreign currency accounts, mode of payments, etc., must be as per prevailing exchange control laws.
Fee Structure	The regulation is silent with respect to the fee structure.	Foreign HEIs are free to decide a transparent and 'reasonable' fee structure.
Partnerships	Restrictions on academic partnerships between foreign universities and an Indian partner in the nature of a Joint Venture or Dual Degree.	Foreign universities are permitted to collaborate with local partners to set up a branch campus. Local universities can also partner with foreign universities subject to adherence with certain conditions.

State Incentives and Education Hubs in India

State governments are actively formulating policies and offering tax benefits to promote internationalization and encourage foreign universities to establish International Branch Campuses in their territories.



Maharashtra is keen to bring the top universities to establish their branch campus at 'Education Hubs' in the state.

- The Department of Higher and Technical education is exploring the setup of 3 Education Hubs
- State to offer incentives and supportive regulations for foreign institutions

As part of The **Uttar Pradesh** Higher Education Incentive Policy 2024, the first five foreign Multidisciplinary Education and Research Universities established in any area of the state will be eligible for the following benefits:

- 100% stamp duty exemption-20% capital subsidy (Total ceiling of INR 100 Cr)

Karnataka offers incentives for higher education institutions, including easier land acquisition processes and financial grants for research and innovation

- Bengaluru's tech-driven ecosystem has attracted several educational startups and collaborations with international institutions
- Planned dedicated high-impact zone for universities and research centres

Tamil Nadu Industrial Development Corporation (TIDCO) is developing a Smart City to attract global universities positioning the state as a global education and tech destination

- Proximity to Chennai and key industrial corridors offers strong industry-academia linkages and talent access
- Fast-track approvals, land at concessional rates, potential subsidies, and PPP models

Expanding your brand presence-Low risk and low capital



Global Centres

Global Centres of foreign universities serve as regional hubs to support and facilitate various functions such as TNE, policy dialogues, research, administrative services, student recruitment, and academic collaboration.

Melbourne Global Centre –Delhi
University Of Chicago Centre-Delhi



Global capability centres/ Global support centres

There is a strong and emerging opportunity for global universities to establish Support Centres in India, providing a comprehensive range of administrative, academic, and digital services to their home campuses. Coupled with India's strong technology and digital capabilities. Helps expand existing global talent base and drive financial and operational efficiencies.

SDA Bocconi Asia Centre-Mumbai

Centres of Excellence

Universities can partner with companies and state governments to help them fund and set-up research, development and innovation centres.

Centre of VLSI - Xilinx, Altera, Intel and DRDO –IIIT Hyderabad

Indian Institute of Science (IISc) and Tata Group

The Government of India has approved 181 mn for the establishment of three AI - Centres of Excellence (CoEs) aimed at making India a global leader in AI



Joint Academy

Joint Academy combines India's academic infrastructure and talent base with foreign university global curriculum and credentials, offering a low-capital, high-impact pathway for international collaboration, student mobility, and research engagement. This is a pathway offering.

BITS–RMIT Higher Education Academy (India)

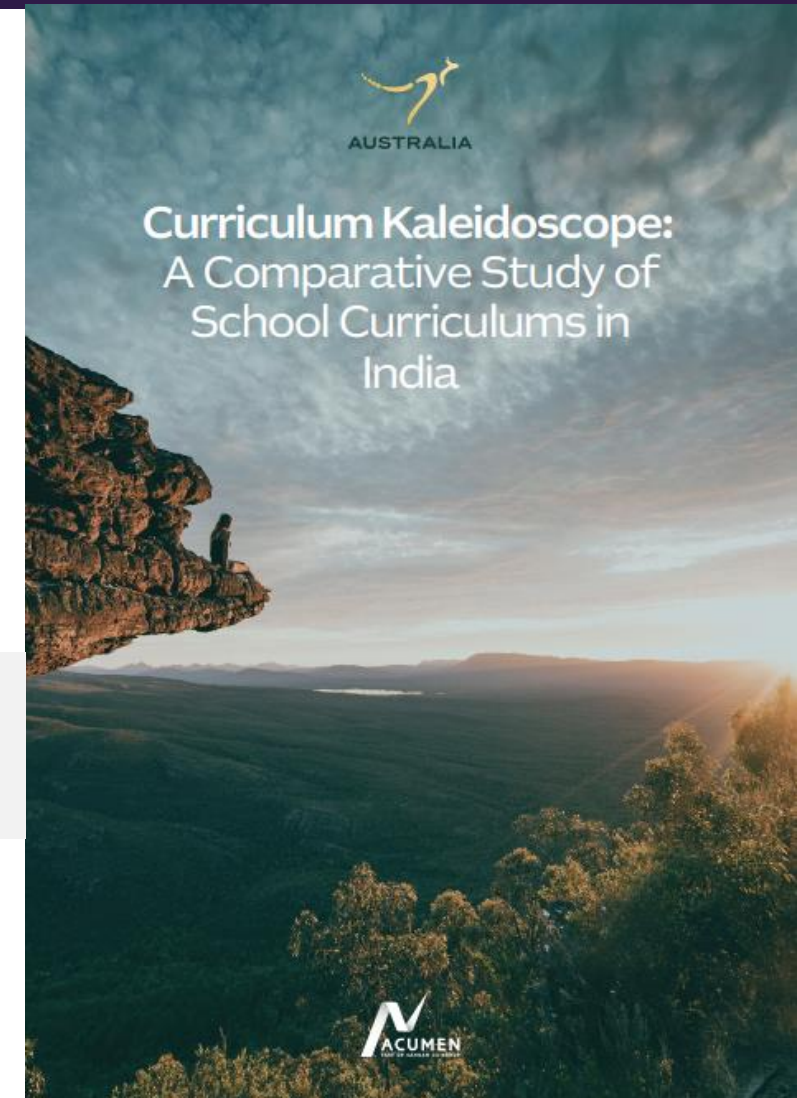
BITS-RMIT
Higher Education Academy



School TNE - Opportunity

- Australian curriculum and state certificates such as WACE already being delivered in several India schools, providing a clear proof of concept.
- Australian curricula are valued for their skills based, inquiry led approach which aligns with India 's NEP 2020 focus on critical thinking and competency-based learning.
- Opportunity to expand into other state programs such as SACE, VCE, and teacher training partnerships, building pathways into Australian universities.
- Potential for joint schools, offshore campuses and other models, support by local partnerships.

Austrade has commissioned a comparative study between Indian, global boards and Australian curricula to assess alignment, opportunity and pathways – to be released shortly.



Tapping into India's Skilling Boom

Australia – India Partnerships for Vocational Education

Opportunities in India

Key Regions



Tier 2 and Tier 3 regions account for over 90% and are fastest growing

Skilling Aspirations



- Developed economy by 2047
- Skill 400 million people by 2030

High growth sectors



- Health
- Sports
- Green economy
- Industry 5.0
- Aviation
- Infrastructure and Logistics
- Hospitality

Why Partner?

India's National Education Policy (NEP) 2020



- Promotes global partnerships
- Vocational integration for institutes
- Re-skilling and upskilling for industry

The Australian VET system is well positioned to meet India's huge and evolving skill development needs.



- Industry-integration
- Work integration learning programs
- High employment outcomes - 90% (vs ~40-45% in India)

Key Partners



- State Governments
- Universities
- Industry-led skilling academies
- Corporates
- Trade Bodies

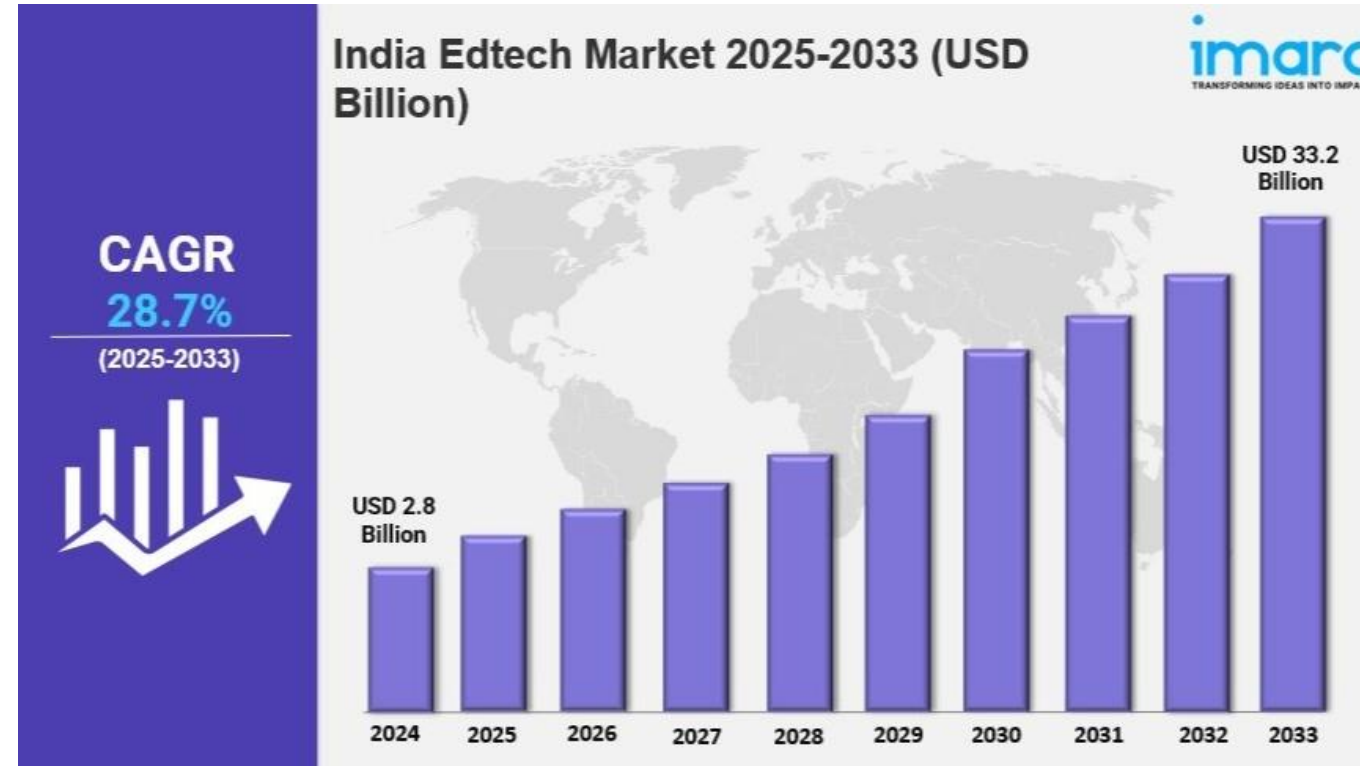
Way forward

- **Bridge** skill gaps in India's priority sectors
- **Localize** Australian models
- **Assess** potential funding avenues
- **Strengthen** partnerships with stakeholders
- **Expand** collaboration to non-technical skills



EdTech

- Edtech market in India, currently worth USD 7.5 billion, growth rate of more than CAGR 28.7% and expected to reach USD \$33 Billion by 2033
- As of December 2024, Indian Edtech has more than seven unicorns, 1300 plus funded companies, 14 billion USD total funding, and 3 IPOs.
- **Australian Universities:** Offer quality content to Indian edtech companies who are delivering certificate, degree programs and other skill development courses
- **Australian Edtech:** Collaborate with higher education institutions in India to deliver certificate, degree programs and other skill development activities. In K12, opportunities is in upskilling teachers, introducing gamified content or offering skill-based programs at schools
- **Enterprise Solutions:** Partner with trusted platforms to deliver customised learning and upskilling solutions for corporate and government bodies



Next Edtech and Skills Mission planned for 17-21 November 2025 during DIDAC exhibition in Delhi

Regional Spotlight

(Bangladesh)



Why Bangladesh.



- Expanding target population and improving economic conditions
- 34% population - Aged 15 years and younger
- Demand for globally recognised qualifications
- Short- and long-term vocational education training for industry & government



- 1.5 million school leavers & with only 25,000 (more or less) outbound international students for higher education
- Limited capacity and low-quality offerings in public & private universities drives students to look for alternative options



- A progressive regulatory environment. Foreign universities have been allowed to establish independent campuses since 2014
- Joint ventures and collaborations with local institutions to deliver programs in Bangladesh
- Build partnerships with select High schools

What's new!

Opening borders for TNE partnerships was influenced by the need to improve the tertiary education sector.

Key regulatory bodies include the **University Grants Commission** and the **Ministry of Education**. Their emphasis is on **capacity building** and adopting a diversified and holistic approach to fulfil their skills gap requirements.



Regulatory bodies allow the establishment of foreign university branch campuses. They prefer **TNE partnerships with new infrastructure and research facilities** rather than upgrading an existing university directly to a TNE partnership.



Regional Spotlight

(Sri Lanka)



Why Sri Lanka.



Education Landscape

- Population | ~23.2M (2025 est.); 38% under age 30. 23% aged 14 or younger.
- English: medium of instruction across higher ed, international & leading schools.
- Public universities + large non-state higher education sector.
- 18,000+ Sri Lankan students in Australia – Australia remains #1 destination.
- 45+ Australian institutions active (universities, TAFEs, professional bodies, school curricula).
- Strong alumni and diaspora links with Australia.



Priority Pillars

- **ICT** | Approx. 85,000 working ICT professionals, with growth approx 20% YoY.
- **Health** | Approx. 150,000 inc. ~44,000 nurses, 23,000 doctors. Shortfall of ~30,000 nurses.
- **Education** | 40,000+ vacancies in schools.
- **Tourism & hospitality** | Annual shortfall of approx. 20 – 25,000.

Why Sri Lanka.



Challenges

- **Economic & Social** | Gradual recovery, persistent affordability gap. Families face rising costs.
- **Education and Skilling reforms** | phased in from 2026 onwards.
- **Infrastructure & digital gaps** | broadband penetration has improved to 58% nationally, yet rural connectivity and power issues constrain digital delivery.



Opportunity

- **Legacy** | 78- year bilateral education relationship. TNE and pathways appetite remains strong.
- **Australian Quality** | reputation for quality, employability, global pathways.
- **Alignment** | Sri Lankan Government priorities. oD

Upcoming activities in South Asia

1. DIDAC Edtech/Skills - November
2. TNE Week in India - February
3. University Founders Delegation to Australia – February
4. APAIE – February





Australian Government

Australian Trade and Investment Commission

Thank You



AUSTRALIA

Morning Tea & Networking Break

10:20 – 10:50



Australian Government

Australian Trade and Investment Commission

Study Australia Market Update

Mainland China, Hong Kong and Taiwan

Austrade Mainland China, Hong Kong and Taiwan Education Team

CHINA EAST



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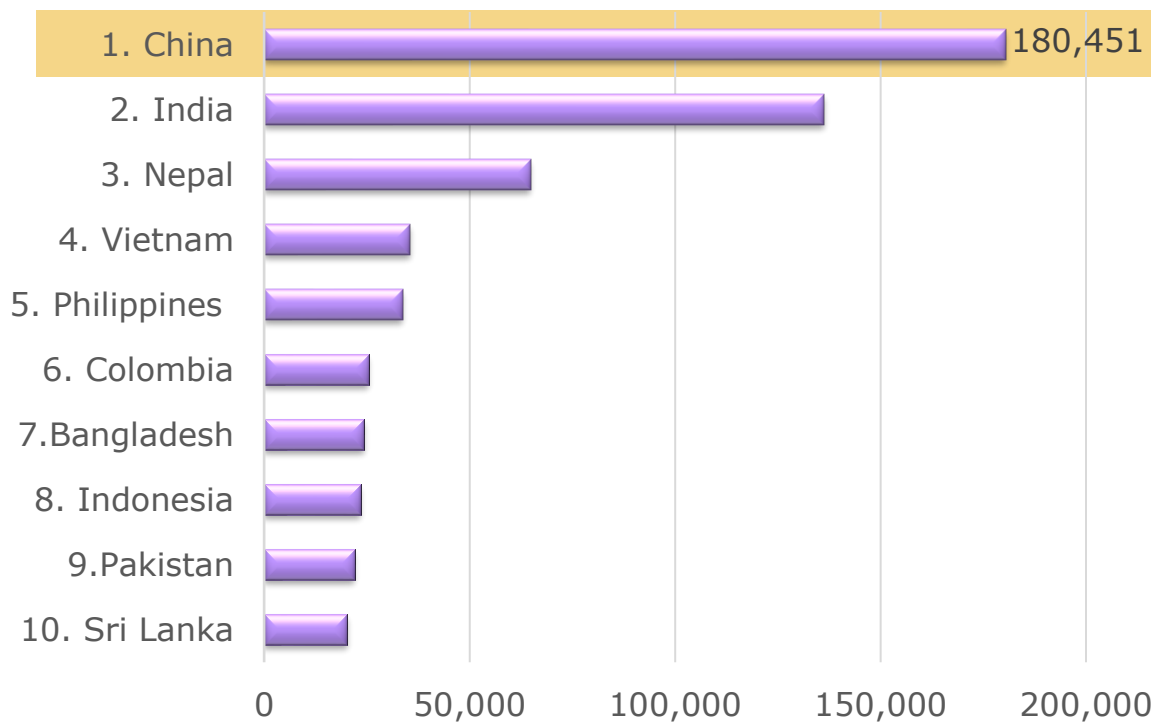
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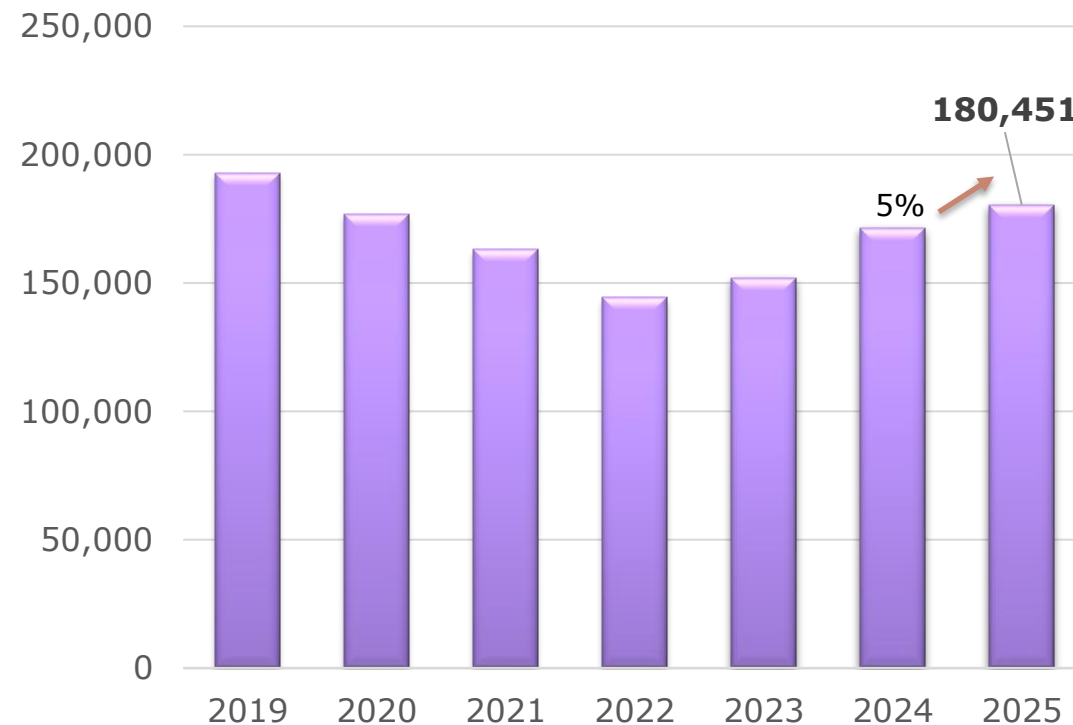
MARKET UPDATE – MAINLAND CHINA

China remains Australia's leading international student market

Australia's top 10 source markets:

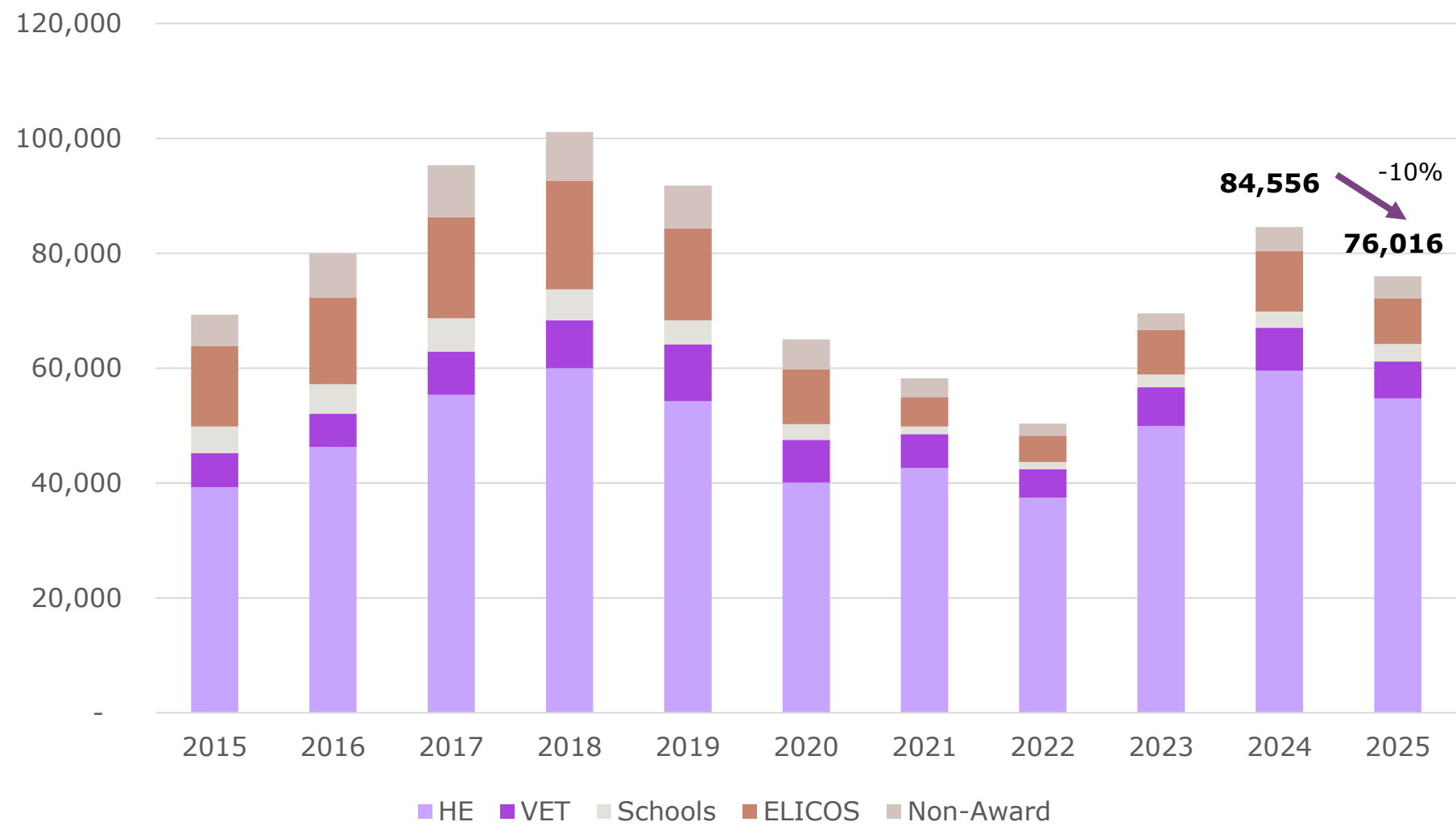


YOY Chinese student growth:



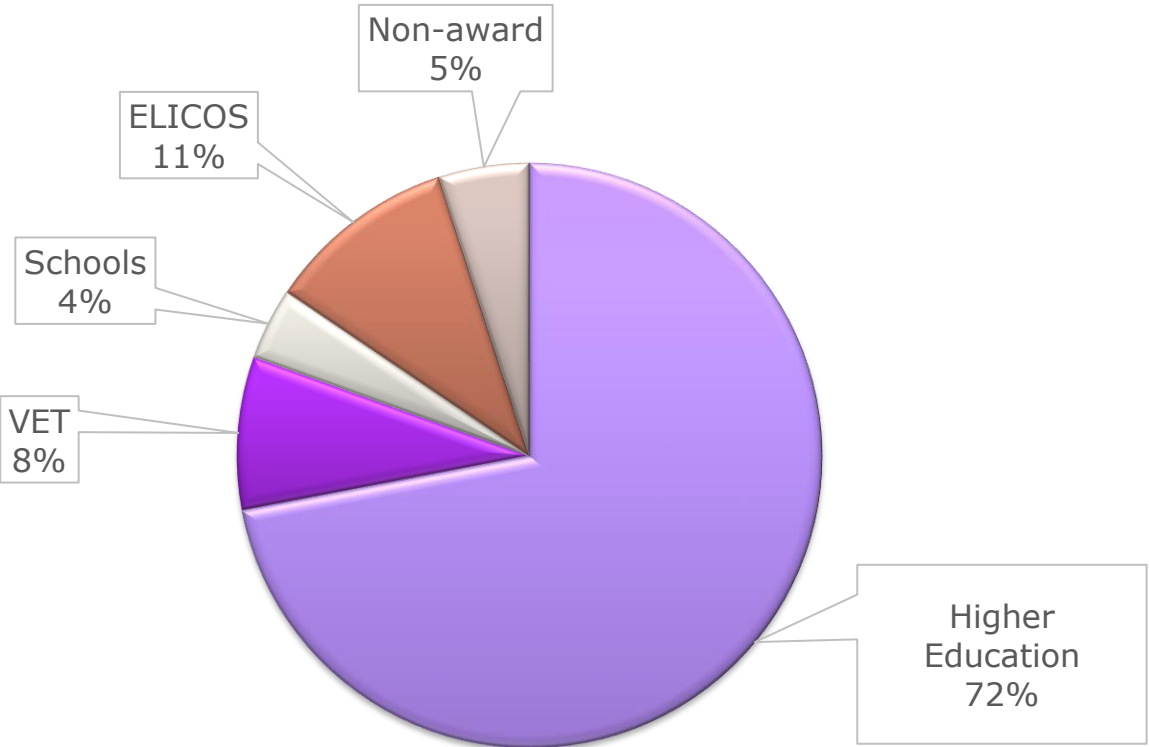
Source: Department of Education data, YTD July 2025

Chinese student commencements



DID YOU KNOW:
China accounts for
22% of all international
commencements

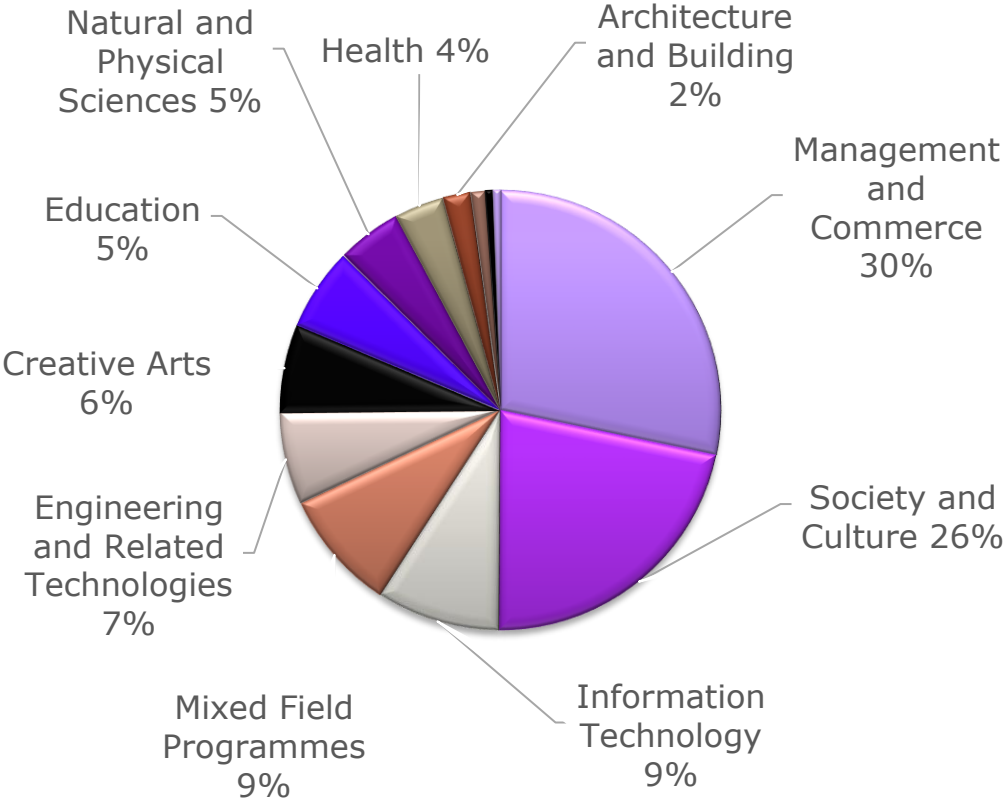
Chinese student commencements by sub-sector



Sector	2024	2025	Change 24-25
HE	59,543	54,738	-8% ↓
VET	7,490	6,428	-14% ↓
Schools	2,810	3,013	7% ↑
ELICOS	10,569	8,024	-24% ↓
Non-Award	4,144	3,813	-8% ↓
Grand Total	84,556	76,016	-10% ↓

Source: Department of Education data, YTD July 2025

Chinese HE student disciplines are diversifying



Discipline	YTD July 2024 Commencements	YTD July 2025 Commencements	% Change 24-25
Management and Commerce	22,296	19,154	-14%
Society and Culture	7,718	6,957	-10%
Information Technology	7,613	6,532	-14%
Engineering and Related Technologies	4,696	4,848	3%
Creative Arts	4,643	4,808	4%
Natural and Physical Sciences	3,694	3,884	5%
Education	4,043	3,733	-8%
Health	2,018	2,386	18%
Architecture and Building	1,570	1,239	-21%
Agriculture, Environmental and Related Studies	475	448	-6%

Source: Department of Education data, YTD July 2025

Mainland China Market Insights & Key Trends

**Sustained Demand, but
Increased Interest in New
Markets and TNE**

**Clear Focus on ROI
due to Economic and
Employment Pressures**

**Stability and Safety
are also Key Decision-
Making Factors**

**Intensified Competition in
the Agent Industry**

**Shifting National Policy
Priorities - Curriculum
Development and TNE**

**Strong Emphasis on Skills
Training**



Austrade Mainland China upcoming events

- International School Counsellors Workshops in multiple locations (Shanghai, Chengdu, Guangzhou, Beijing)
- Australian Universities Employability Forum, Qingdao, 4–6 Dec 2025
- Study Australia profiling events in partnership with national education agents
- Outreach Activities in 2nd tier cities
- Study Tour promotions



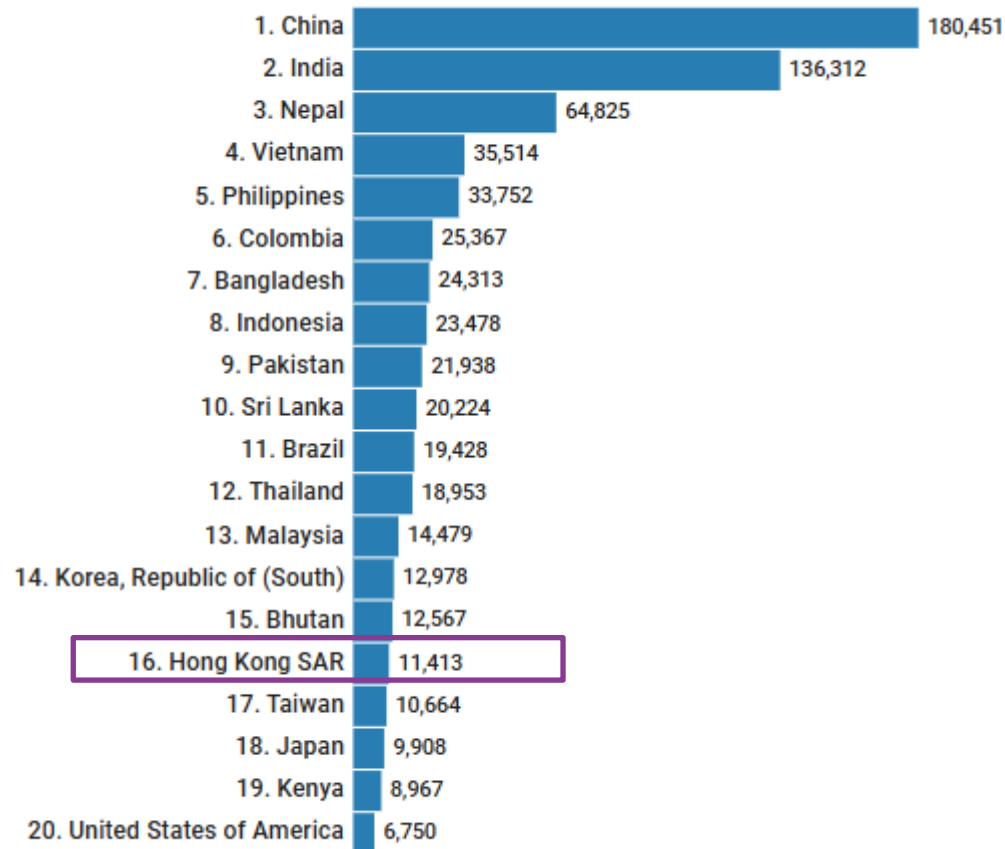
Australian Government

Australian Trade and Investment Commission

MARKET UPDATE – HONG KONG

Hong Kong is an important market for Australian international education

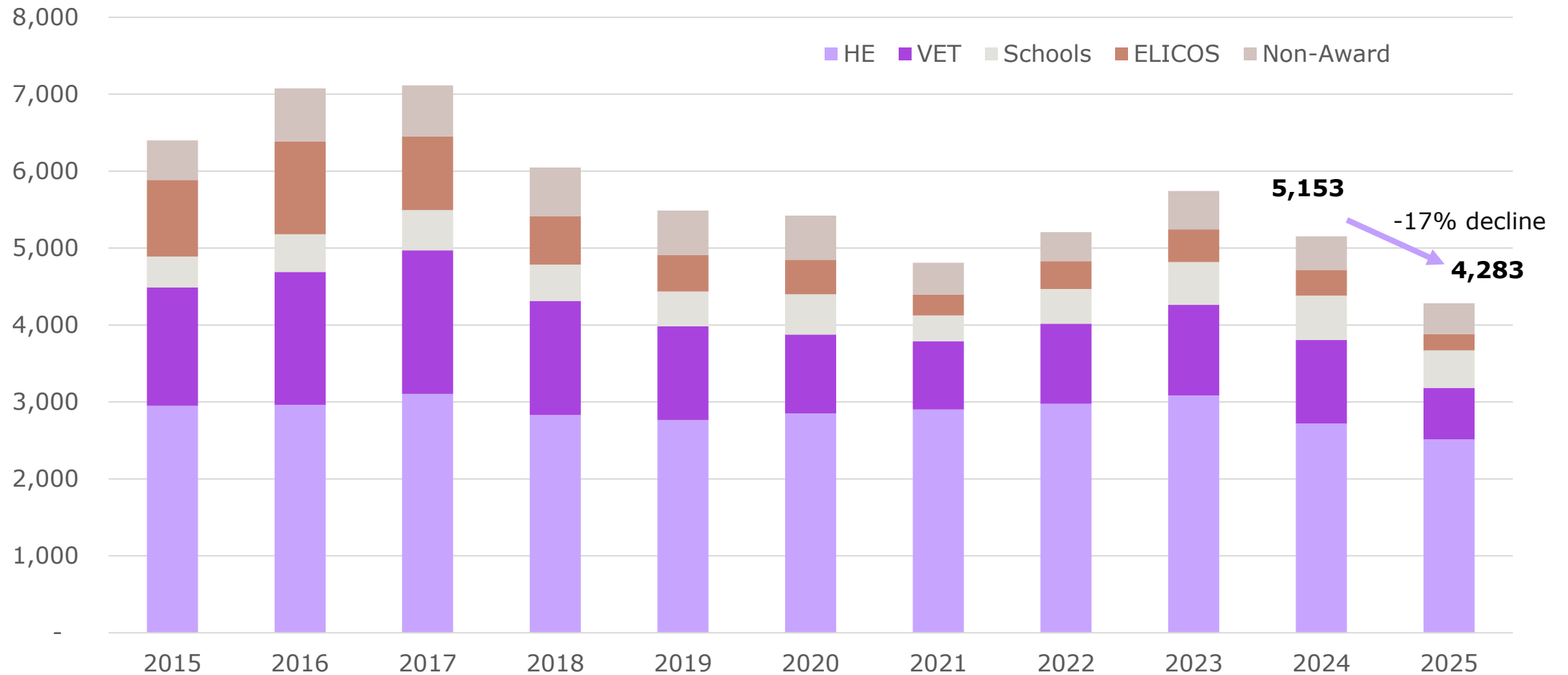
Top 20 source market by student numbers



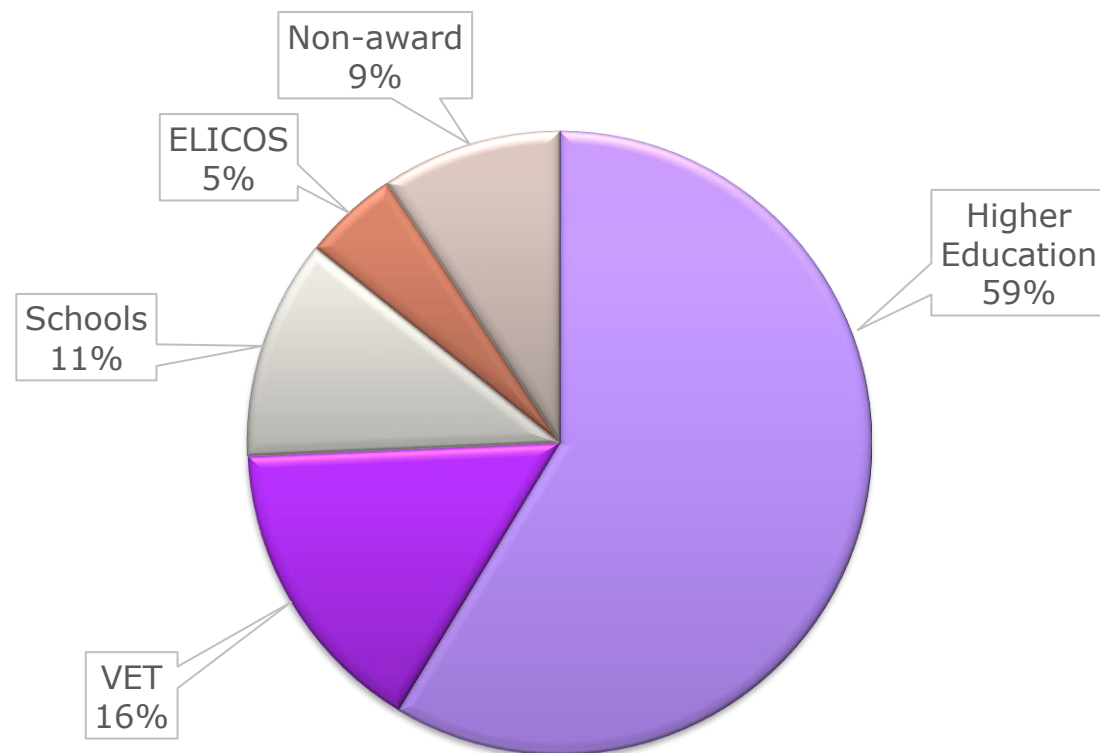
Student enrolments by sub-sector	2025 July Ranking
Overall Student Enrolments	20th
Higher Education Sector	11th
School Sector	3rd
Non-award Sector	10th

Source: Department of Education data, YTD July 2025

Hong Kong student commencements



Hong Kong student commencements by sub-sector



Sector	2024	2025	Change 24-25
HE	2,720	2,512	-8% ↓
VET	1,086	671	-38% ↓
Schools	577	489	-15% ↓
ELICOS	335	211	-37% ↓
Non-Award	435	400	-8% ↓
Grand Total	5,153	4,283	-17% ↓

Source: Department of Education data, YTD July 2025

Hong Kong Market Insights & Key Trends

Shrinking Student Pool

**Intensified Local
Competition**

**Highly Competitive
Recruitment**

**New Talent Pipeline &
Increased Scholarship
Offerings**

**Rising Demand
for Study Tours**

**Evolution of Agent
Landscape**



Austrade Hong Kong upcoming events

- Study Australia profiling events in Hong Kong and Macau
- Asia-Pacific Association for International Education Conference will be hosted in Hong Kong in February 2026
- State-focused education promotion workshops
- Theme-based study tour opportunities
- Study Australia education showcase at international and local schools

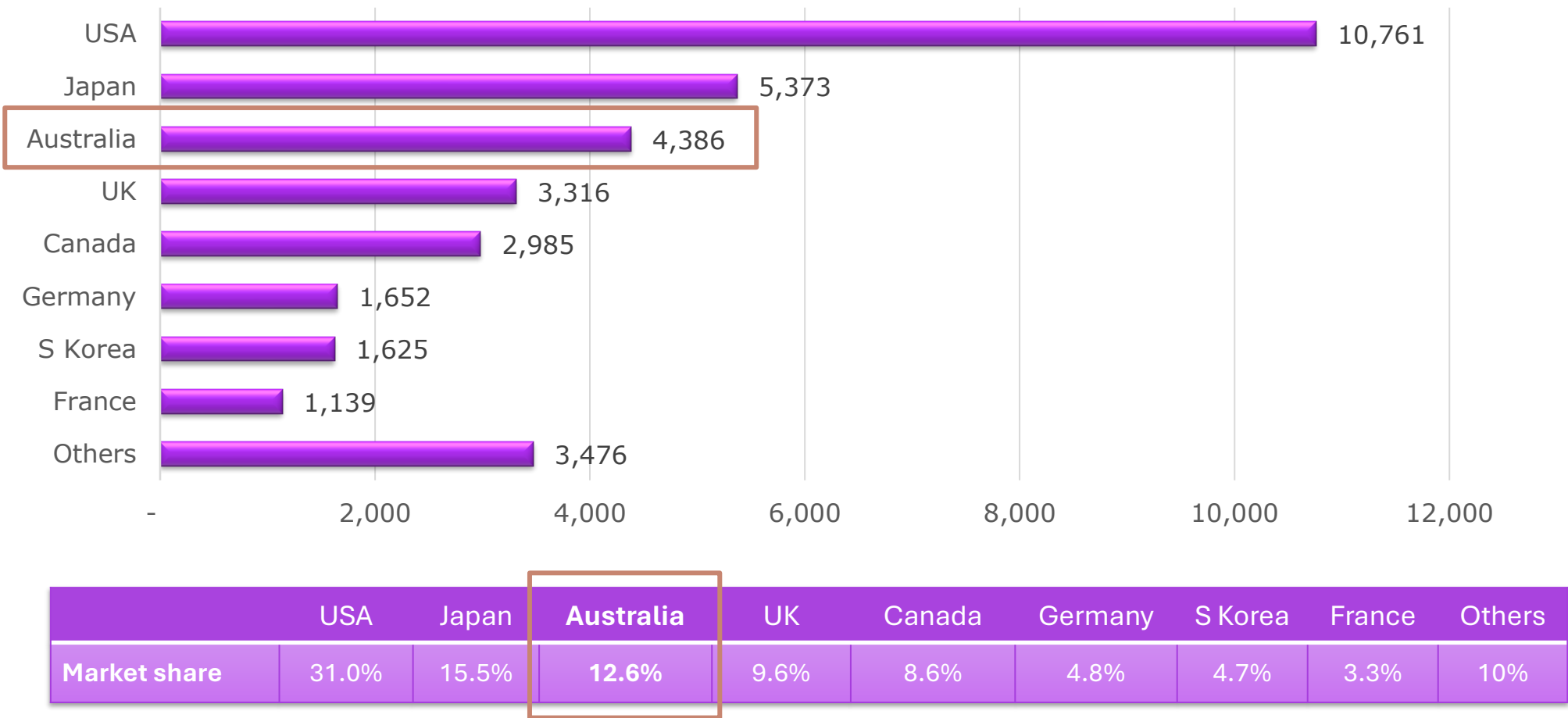


Australian Government

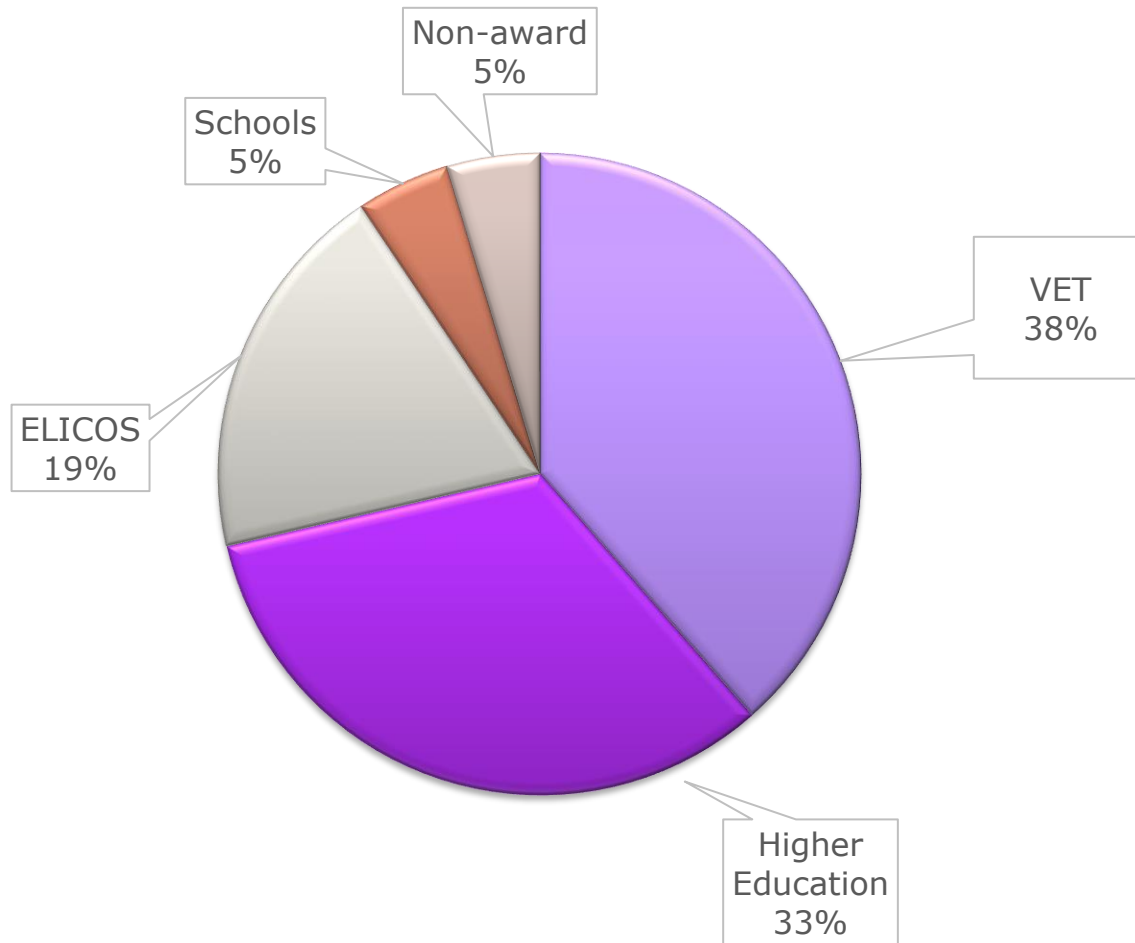
Australian Trade and Investment Commission

MARKET UPDATE – Taiwan

Taiwan's top international education markets by student visas issued in 2024



Taiwan student commencements by sub-sector



Sector	2024	2025	Change 24-25
VET	2,419	2,003	-17% ↓
HE	1,680	1,708	2% ↑
ELICOS	1,247	1,001	-20% ↓
Schools	206	245	19% ↑
Non-Award	237	242	2% ↑
Grand Total	5,789	5,199	-10% ↓

Source: Department of Education data, YTD July 2025



Taiwan Market Insights & Key Trends

**Governmental Support for
Students to Study Abroad**

**Safety and Career Prospects
Remain the Two Major
Pulling Factors**

Evolving Parental Mindset

**Popularity of Short-Term
Programs**

**Career-Driven Program
Selection**

**Visa Grant Rate is a
Critical Factor**

Austrade Taiwan upcoming events

- EMI Teachers Training Showcase, Nov 2025
- Australian education joint promotion, Mar 2026 (in collaboration with Taiwan Australia-focused agents)
- Campus outreach focusing on:
 - ✓ Schools - study tours (pipeline building)
 - ✓ Universities - TNE + study abroad
- School initiative - agent familiarisation trip, April 2026
- Study Australia Education Exhibition in Taiwan, Sep 2026



Australian Government

Australian Trade and Investment Commission

Thank you



AUSTRALIA

STUDY
AUSTRALIA



Australian Government

Australian Trade and Investment Commission

JAPAN

EDUCATION MARKET OVERVIEW

October 2025

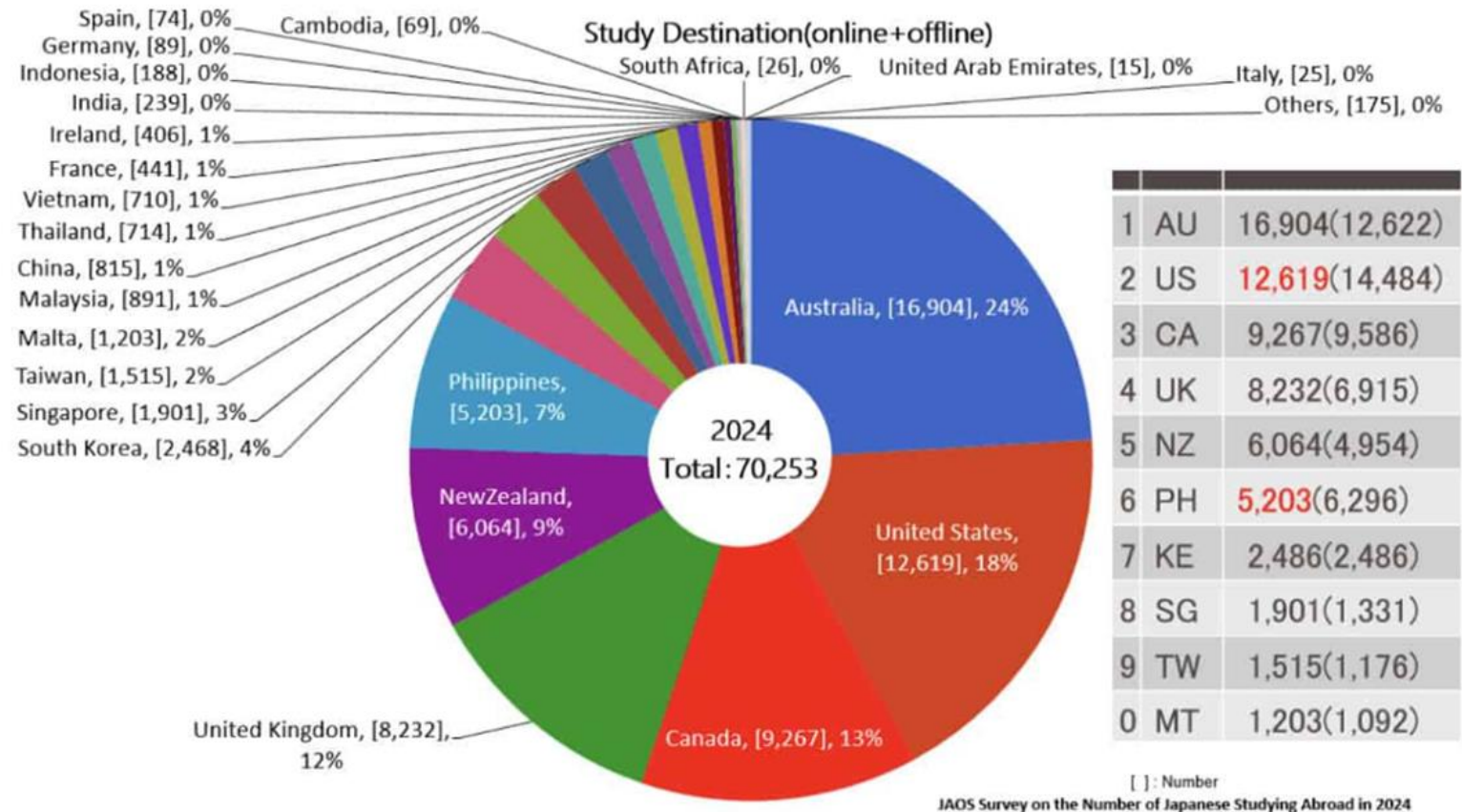


JAOS Survey 2024

Australia is No.1 destination

Key findings

- Recovered to 90% of pre-pandemic levels
- Australia rose to #1 study destination
- UG degree-seeking study abroad rising
- Asia gaining popularities for full study and study tours

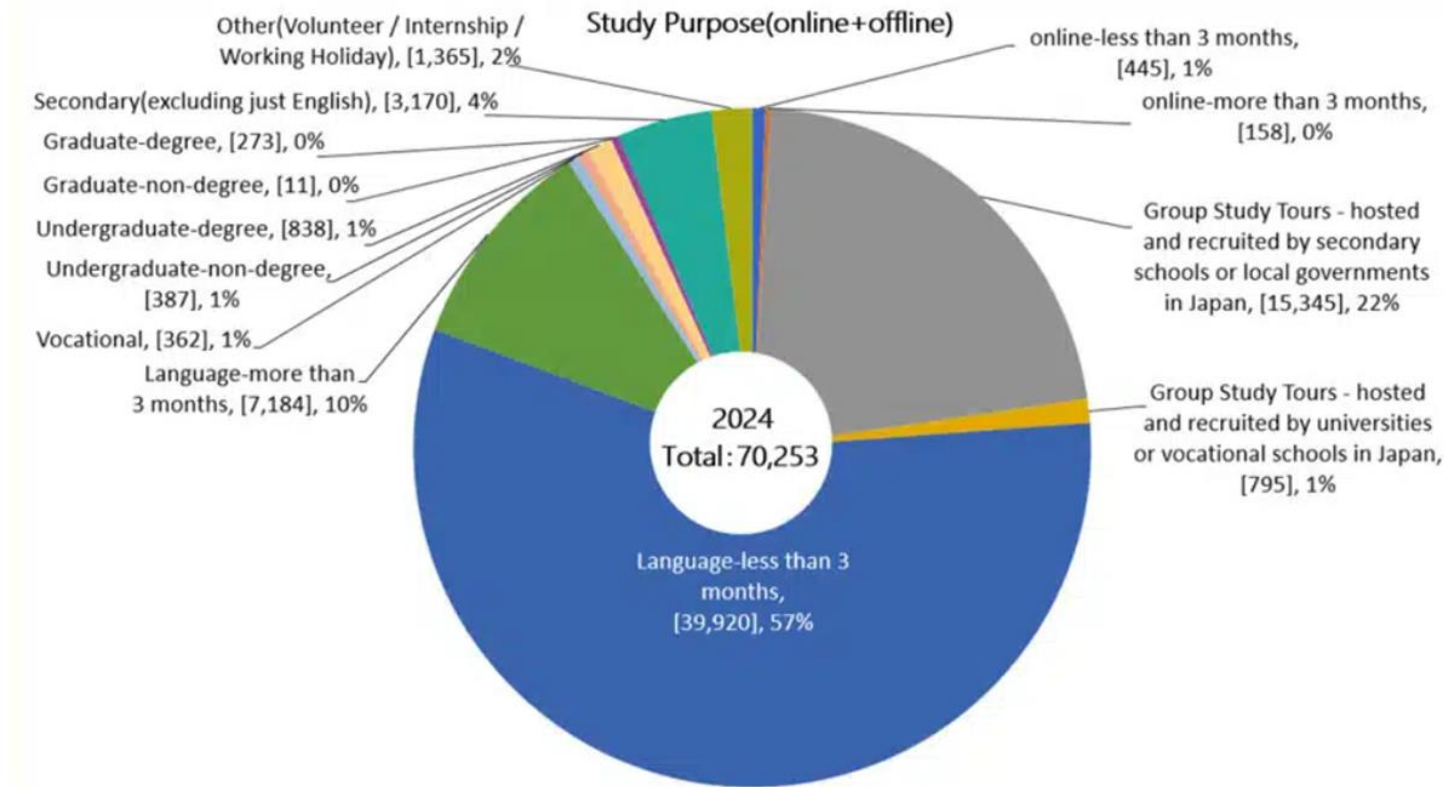


JAOS Survey 2024

Purpose of study

Key findings

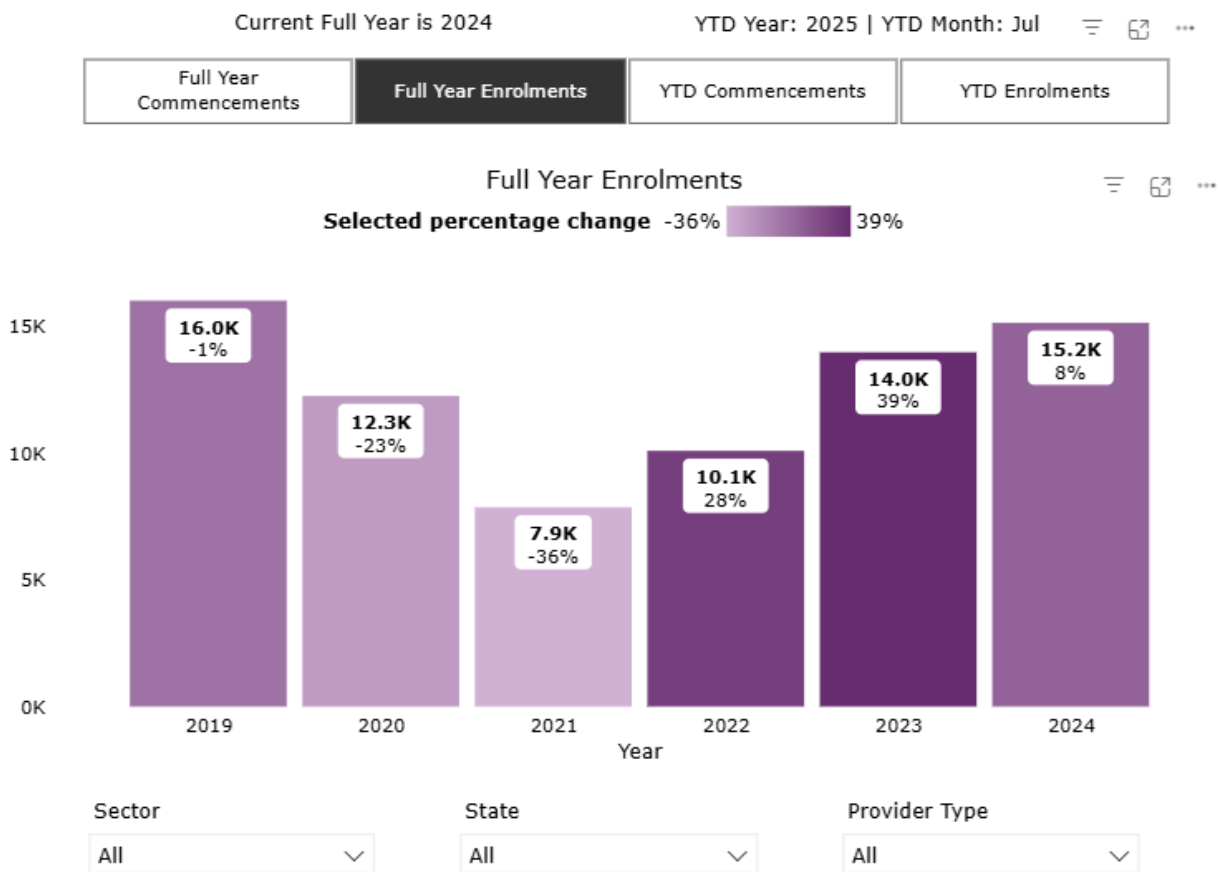
- Group study tours account for 23%
- Supported by Japanese government initiative to increase Japanese students studying abroad to 500,000 by 2033
- Short-term (less than 3 months) ELICOS study takes up 67%



Purpose of study for Japanese outbound students, 2024. Source: JAOS

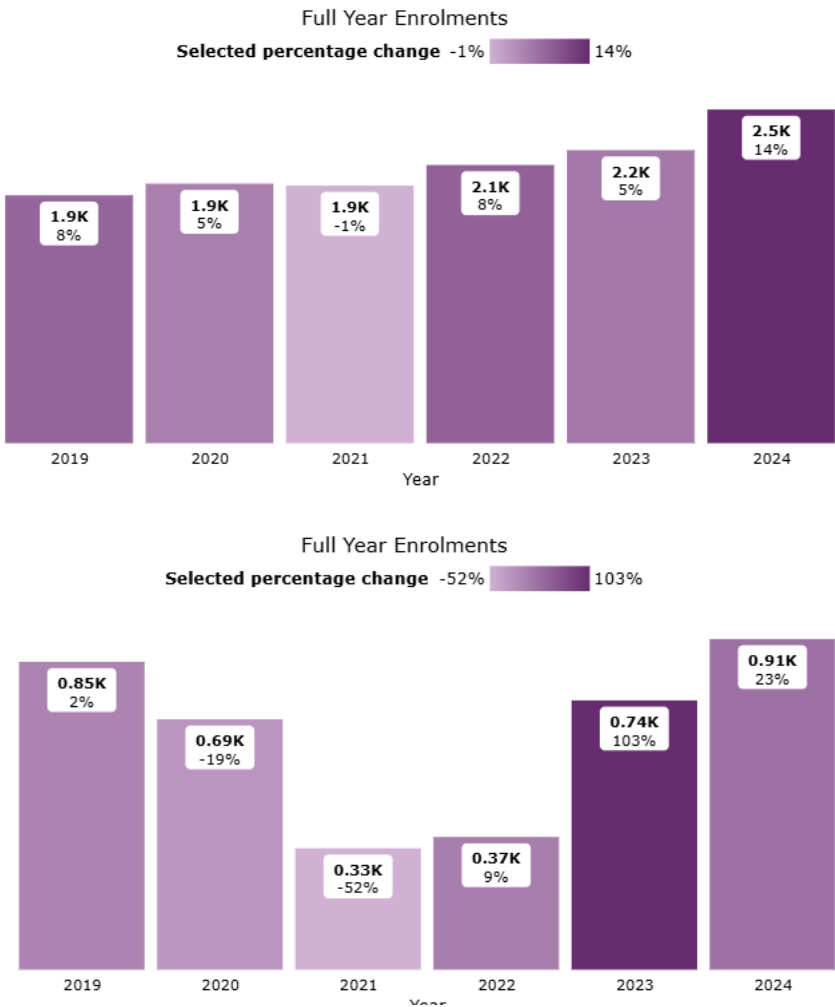
Japanese student enrolments 2024

Higher Education



Report run on: 2/10/2025 UTC

School



Source: Department of Education

Key drivers for International Education



Parents

- understand the need for global skills in the workplace
- Value study abroad from their own experience



Schools

- Promote internationalization to attract students in a declining market
- Introduce international curriculum
- Support students going overseas universities
- Establish international schools



Universities

- Promote internationalization to attract domestic and international students in a declining market
- Seek students with high English proficiency
- More degree programs offered in English
- Establish Double degree programs with overseas partner units



Students

- English proficiency is improving
- Aiming for overseas universities is becoming more common

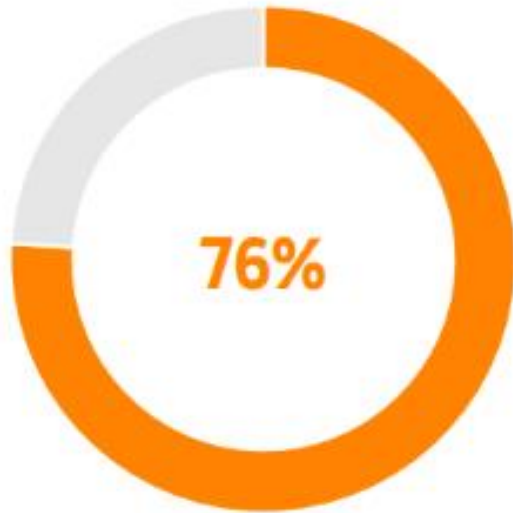


Agents

- Destinations have become more diverse
- Promote Asian countries
- Shift away from USA

Challenges – Financial constraints

Supportive of going abroad but too expensive for an average household



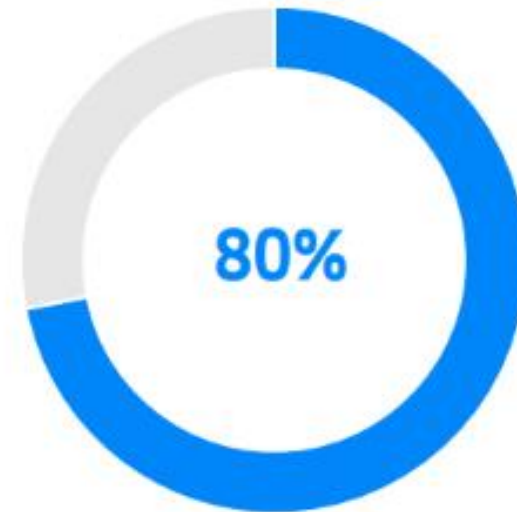
Parents are supportive

Majority of parents would like for their children to go abroad



Can only afford up to \$10K

21% can not afford any money for study abroad



Money is the biggest hurdle

They want to go but can't afford the cost.

Summary

- UG degree-seeking study abroad is rising
- Internationalization is advancing at school/university level
- Australia is seen positively as a high-quality and safe study destination
- High income segment exists in Japan
- Short-term group study tours continue to be popular
- Financial barriers remain high, driven by weak yen and inflation
- Lower-cost Asian destinations are gaining ground due to affordability

Opportunities

- Scholarships
- TNE – Asian campuses



Austrade in Japan

2025-26 Upcoming activities

- **Study Australia Agent/Institution Workshop – 5 Dec 2025 @Tokyo**
- **Study Australia Education Fair 2026 Japan – 23 May 2026 @Tokyo (TBC)**

Austrade Japan client services include:

- B2C/B2B events as marketing platform for Australian CRICOS-registered institutions
- 1:1 fee-for-services (e.g. introduction to agents/institutions, market research)
- Market intel (via Austrade EDI)
- Social media promotion
- Support State Governments' initiatives

Austrade Japan - Education Team



Margaret Bowen

Consul-General at Australian Consulate General Osaka
/ Senior Trade and Investment Commissioner &
International Education lead for Japan



Saori Tominaga

Education Manager (Austrade Tokyo)



Fumihito Matsumoto

Business Development Manager – Education
(Austrade Osaka)



Australian Government

Australian Trade and Investment Commission

SOUTH KOREA

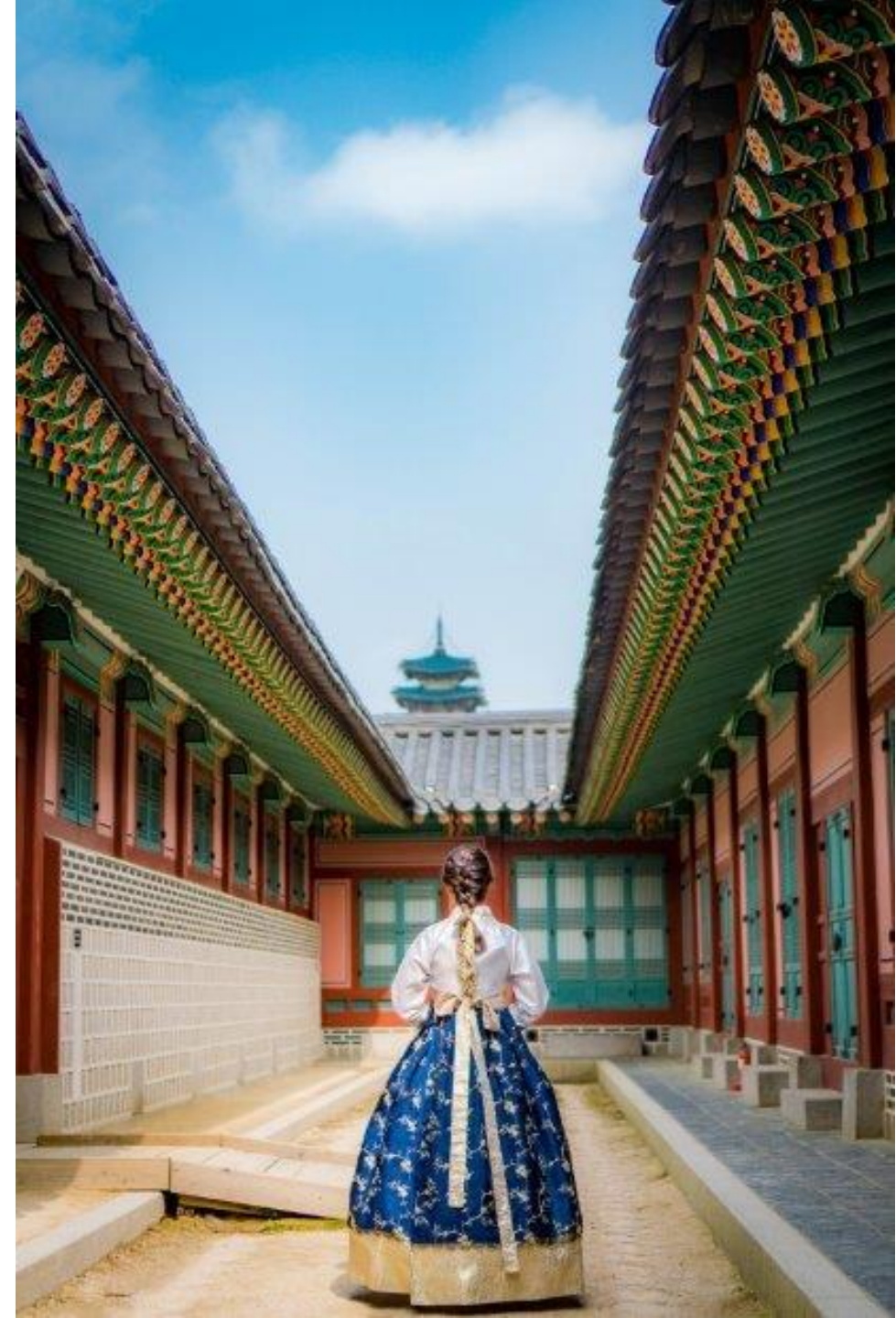
EDUCATION MARKET OVERVIEW

October 2025



Market Overview - Korea

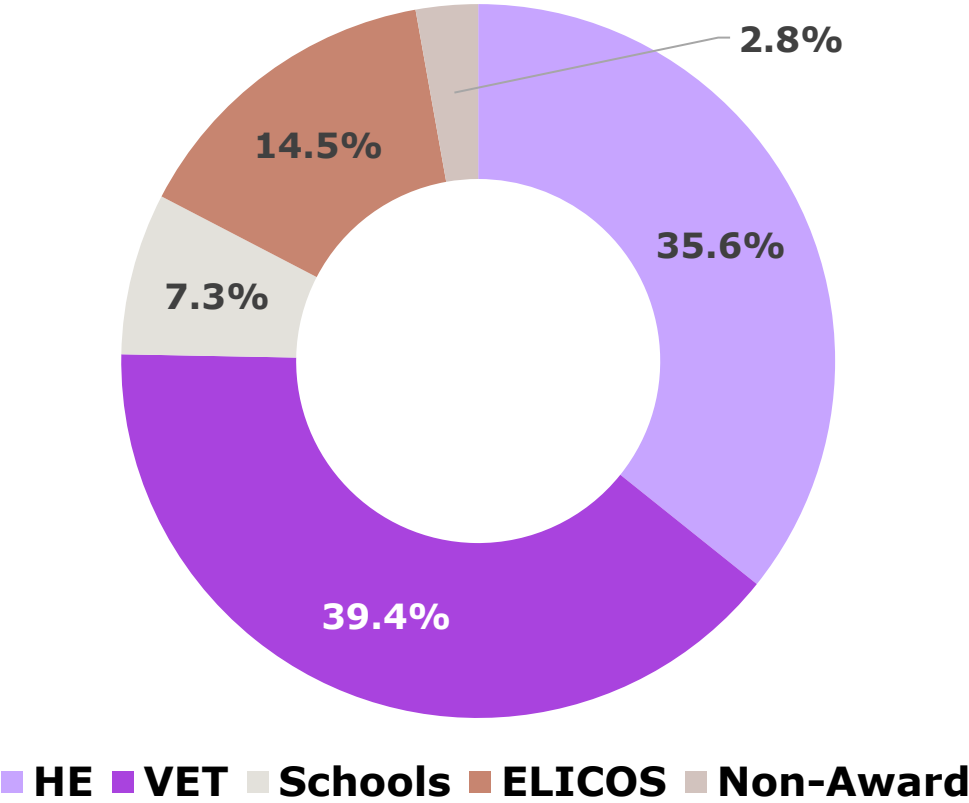
- Korea is 14th largest source country with 17,507 enrolments as of December 2024
 - Increase 7% in enrolments and 16.2% in Commencement
- Australia is well regarded as a safe and affordable study destination that offers study and work opportunities
 - Post study work visas are well received by Korean students
- Mature market but studying abroad is still in demand
- Important market for diversification, high quality students with low visa rejection



Enrolments & Commencements

-YTD July 2025

Korean enrolments by sector,
YTD July 2025



Enrolments

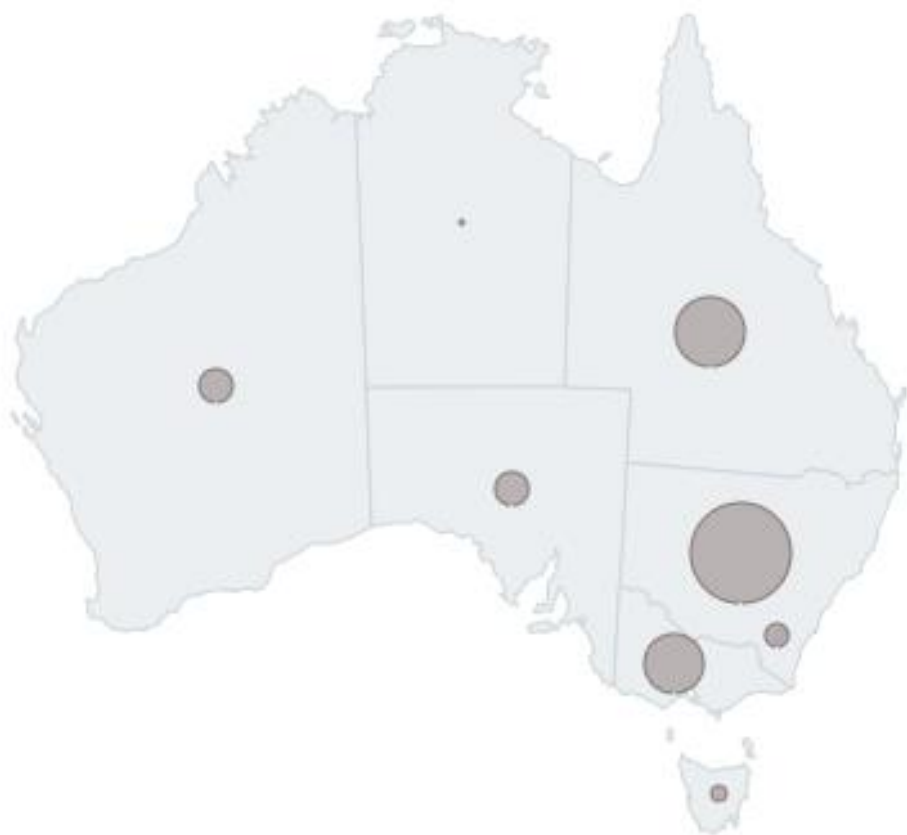
	2023	2024	2025	% Change over 2024
HE	4,533	4,821	5,359	11.2%
VET	6,932	6,678	5,937	-11.1%
School	875	992	1,094	10.3%
ELICOS	1,722	2,176	2,175	0%
Non-Award	382	432	485	11.3%
Total	14,444	15,099	15,050	-0.3%

Commencements

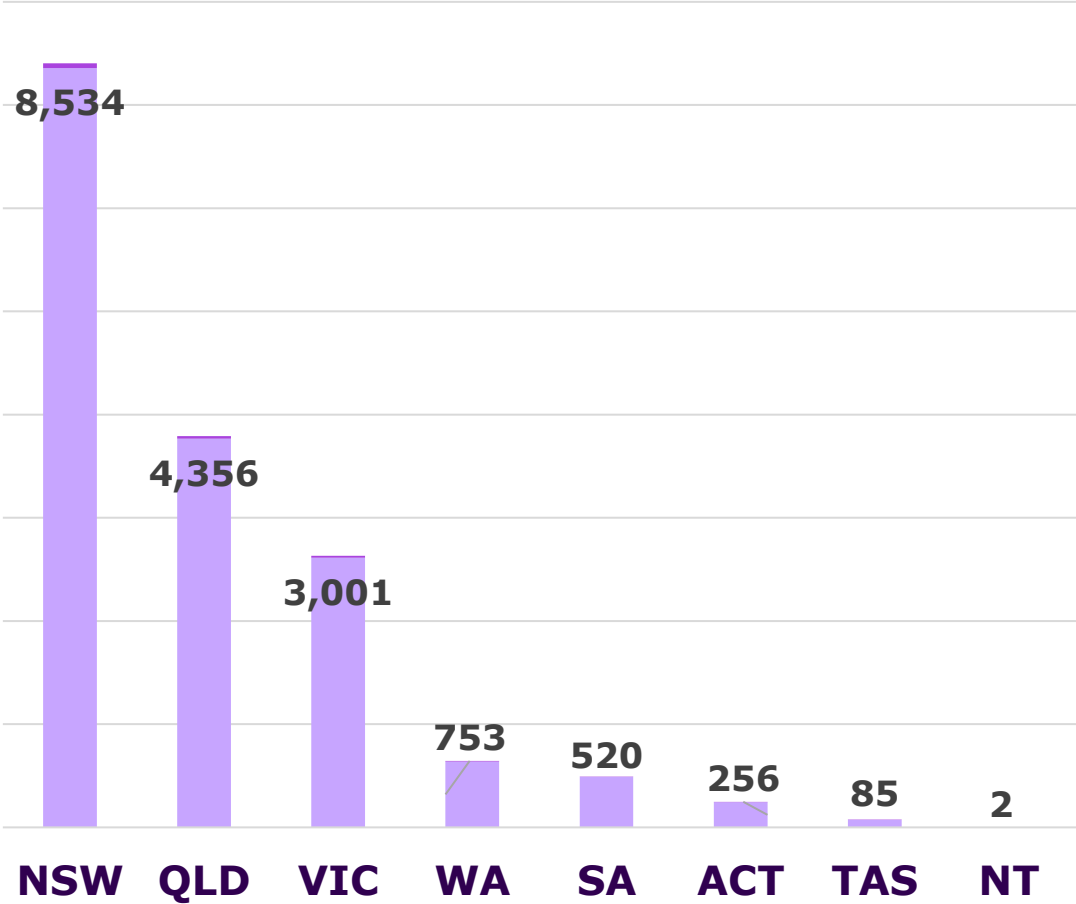
	2023	2024	2025	% Change over 2024
HE	1,556	1,838	2,154	17.2%
VET	2,893	3,003	2,290	-23.7%
School	424	469	516	10.0%
ELICOS	1,198	1,554	1,280	-17.6%
Non-Award	281	359	385	7.2%
Total	6,352	7,223	6,625	-8.3%

Korea: Enrolments by states

Enrolments by state



Korean enrolments by state,
December 2024



Opportunities and Challenges-Korea

Opportunities

- B2C recruitment market via education fairs and agents
- Study Australia Education Fair Korea will be on Sat 15 May 2026, followed by regional roadshow on 18-19 May
- Work experience opportunities are highly regarded during studies/upon graduation
- Migration option is a strong drive
- Safe is important for choosing study destination.

- Tapping into international schools/IB schools/self-funded private high schools for Higher education
- TNE – Offshore campuses in Free economic zone, and diploma pathways with local partners

Challenges

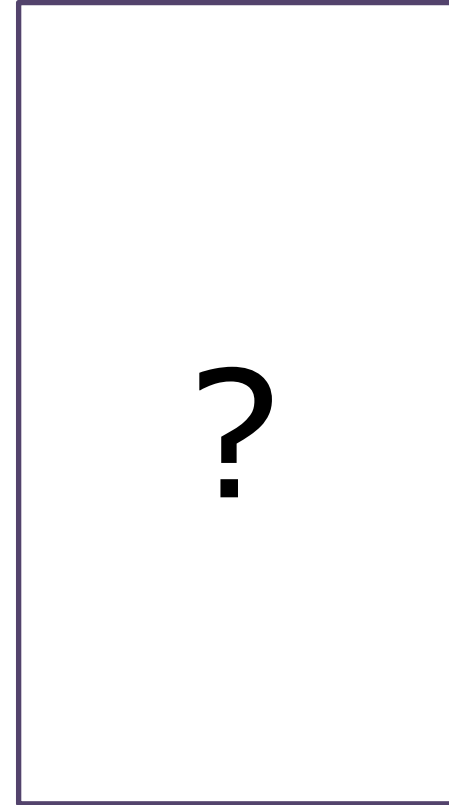
- Low birthrate
- Improved profiles of domestic education by employers
- Low interest of TNE articulation/twinning programs by local institutions

Austrade Seoul-Education team



Emily Chung, Director, Trade & Investment – R&D, ANMI, Education

Emily.chung@austrade.gov.au



Education Manager is hiring

THANK YOU

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