

Transnational Education: Opportunities and considerations

Society of University Lawyers Conference

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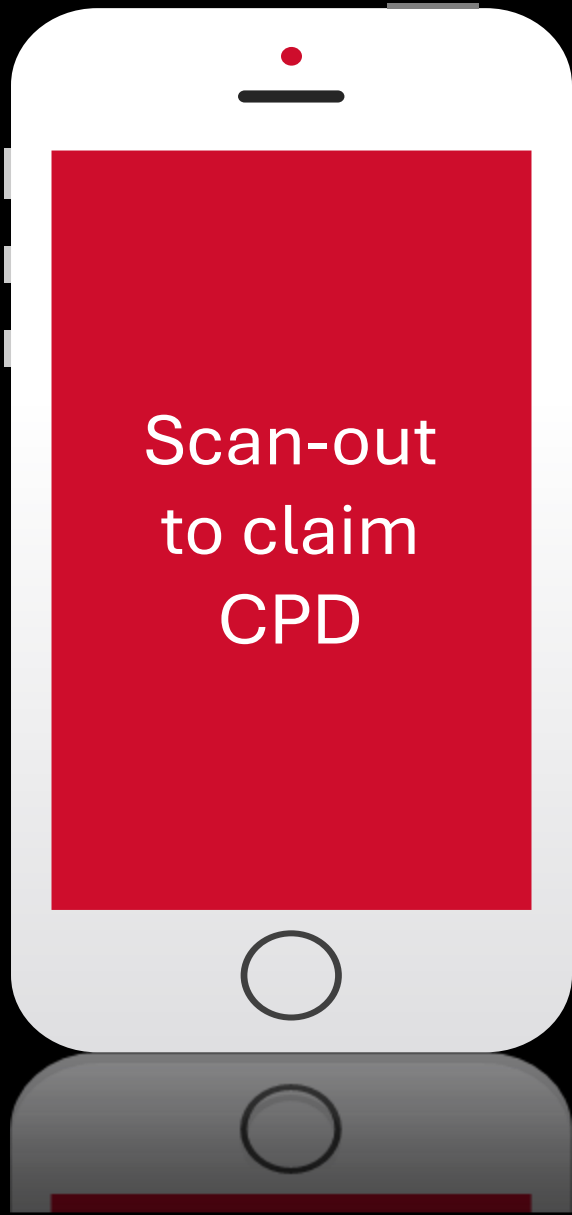
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Current TNE Practice | A Widely Varied Snapshot

University	Offshore Locations	Campus Type
James Cook University (JCU)	Singapore	University-owned
University of Wollongong (UOW)	Dubai, Hong Kong, Malaysia, India, China, Singapore, Saudi Arabia	University-owned and partnered
Murdoch University	Malaysia, Singapore, Dubai	Managed campus partnerships
RMIT University	Vietnam (Ho Chi Minh, Hanoi), Spain	University-owned
Swinburne University of Technology	Malaysia (Sarawak)	Government partnership
Deakin University	Indonesia, England (Lancaster University) GIFT City, India	University owned campus with partnerships with recognised institutions
Monash University	Indonesia, Malaysia	University campus with a local partner
Western Sydney University	Indonesia, Vietnam	University campus with a local partner
La Trobe University, Western Sydney University and University of Adelaide	India (not GIFT City)	Subject to UGC approval currently in process
Various	Various including Vietnam	Research partnerships

University Changes | Strong & Emerging Presence

Total Enrolment Volume – 2023

University	2019	2023	Change	
Whole Sector	76,752	112,149	35,397	Strong Growth
RMIT University	10,183	15,171	4,987	Strong Growth
The University of Sydney	217	11,445	11,228	Strong Growth
Monash University	10,750	10,518	-232	Held position
The University of Melbourne	4,382	8,549	4,167	Strong Growth
University of New South Wales	5,883	7,950	2,067	Growth
Curtin University	5,653	6,345	693	Held position
University of Wollongong	5,583	5,339	-243	Held position
Swinburne University of Technology	3,909	4,921	1,011	Growth
Murdoch University	4,591	4,772	181	Held position
Victoria University	4,240	4,661	421	Held position

Department of Education, Higher Education Statistics, TCSI. Overseas students studying offshore, EFTSL.

- Strong sector wide growth in offshore education delivery
- UniMelb & USyd emerging as high volume, high growth
- Existing high-volume Unis held position.

Sustained Commencement Growth 2019 - 2023

University	2019	2023	CAGR
The University of Sydney	50.14	4,844.30	213.5%
University of South Australia	68.78	1,018.91	96.2%
The University of Notre Dame Australia	7.63	47.68	58.1%
The University of Queensland	42.11	177.57	43.3%
The Australian National University	174.61	707.79	41.9%
University of Tasmania	352.56	1,100.47	32.9%
Flinders University	349.60	1,089.40	32.9%
Charles Darwin University	61.03	177.04	30.5%
Deakin University	310.53	833.47	28.0%
The University of Adelaide	71.40	155.44	21.5%
Sector	30,219	44,493	10.2%

DoE, Higher Education Statistics, TCSI. Overseas students studying offshore, Commencing EFTSL.

- Some emerging new Unis delivering offshore
- High annual growth rates for some Unis

NOTE: TCSI data captures students studying overseas and includes both onsite and online delivery

Australian Education | Strong Presence & Emerging Countries

Leading Countries by Volume - EFTSL

Country	2019	2023	Change	% Change
Sector	84,821	123,771	38,949	46%
China (excludes SARs and Taiwan)	20,111	44,529	24,418	121%
Vietnam	5,726	13,506	7,780	136%
Singapore	13,558	12,588	-969	-7%
Malaysia	14,168	11,244	-2,923	-21%
India	5,082	8,345	3,263	64%
United Arab Emirates	2,472	3,865	1,394	56%
Sri Lanka	2,375	3,750	1,374	58%
Indonesia	2,113	2,932	819	39%
Hong Kong (SAR of China)	2,720	2,675	-45	-2%
Nepal	774	1,904	1,130	146%

DoE, Higher Education Statistics, TCSI. Overseas students studying offshore, by country, EFTSL.

- Sector volume almost doubled between 2019 and 2023
- Singapore, Malaysia and HK saw negative change

NOTE: TCSI data captures students studying overseas and includes both onsite and online delivery

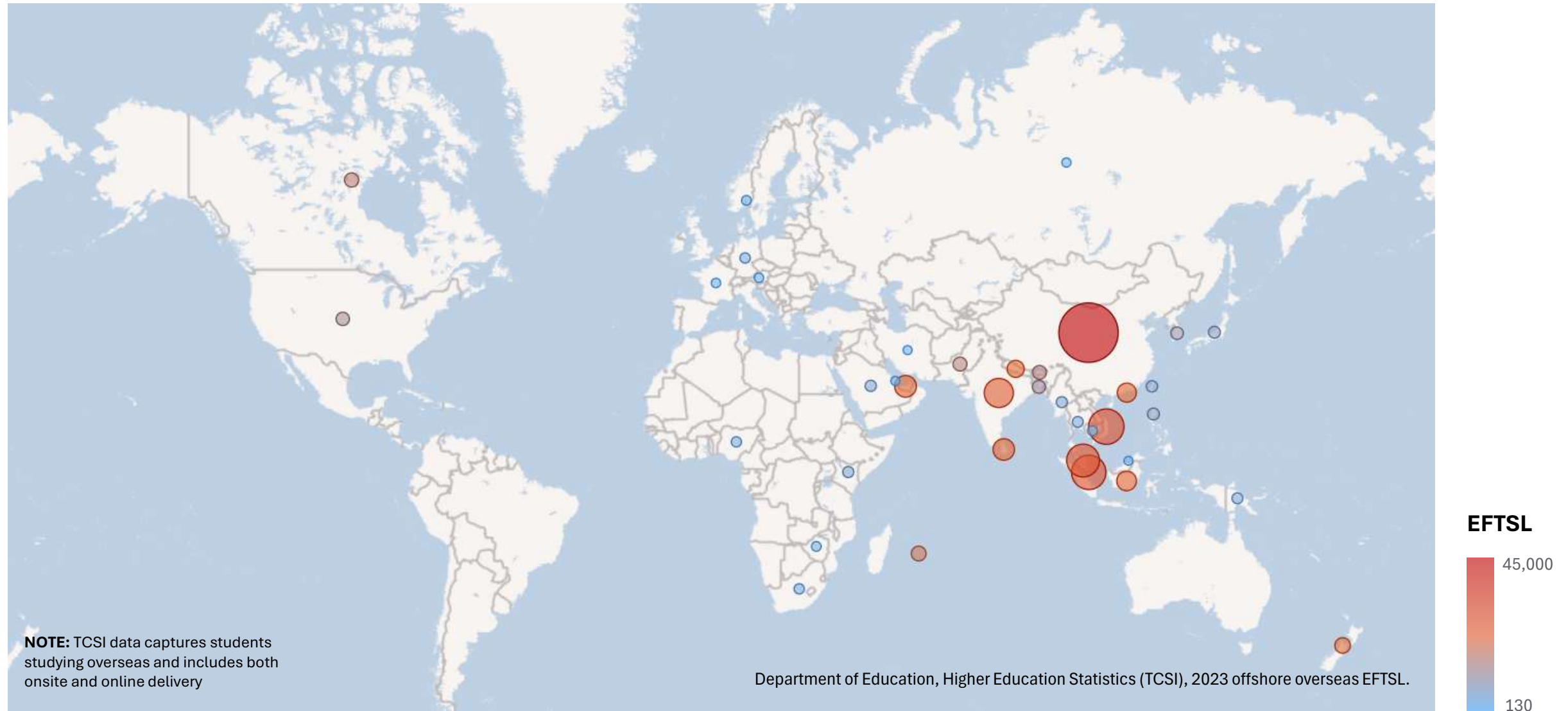
Emerging countries – Annual Commencements

Country	2019	2023	CAGR
Bhutan	138	801	55.19%
Kenya	56	243	44.07%
New Zealand	130	466	37.67%
Pakistan	247	676	28.55%
Nepal	385	1,017	27.49%
Austria	41	106	26.86%
Nigeria	60	126	20.38%
China (excludes SARs and Taiwan)	9,454	18,642	18.50%
India	2,609	4,728	16.02%
Taiwan	105	189	15.95%

DoE, Higher Education Statistics, TCSI. Overseas students offshore, by country, Commencing EFTSL.

- Strongest year on year commencement growth is in emerging markets.
- These may represent new potential suitable markets for Australian Education, through changes in policy or economics.

Distribution of Offshore Students



TNE | Overall Considerations for Opportunities



TNE Providers must meet Australian and local jurisdiction requirements

Risks of TNE, ability to meet local requirements and reputational risks considered

TNE | Education Legislation Amendment (Integrity and Other Measures) Bill 2025

Authorisation for Offshore Delivery

TEQSA authorisation before delivering Australian courses of study offshore

Transitional arrangements in place for providers currently delivering Australian courses overseas.

Process for Application for Authorisation to deliver offshore

New application processes and publication requirements (a register) for authorisation applications

May take 9 - 18 months

Amendments define Offshore Premises and Courses

Some courses exempted:

- *exchange arrangements less than 12 months
- *overseas research required for completion.

Annual Reporting

Providers must provide an annual report detailing their offshore delivery arrangements

Sanctions for Non-Compliance

Conditions/cancellation of authorisation for breach of conditions

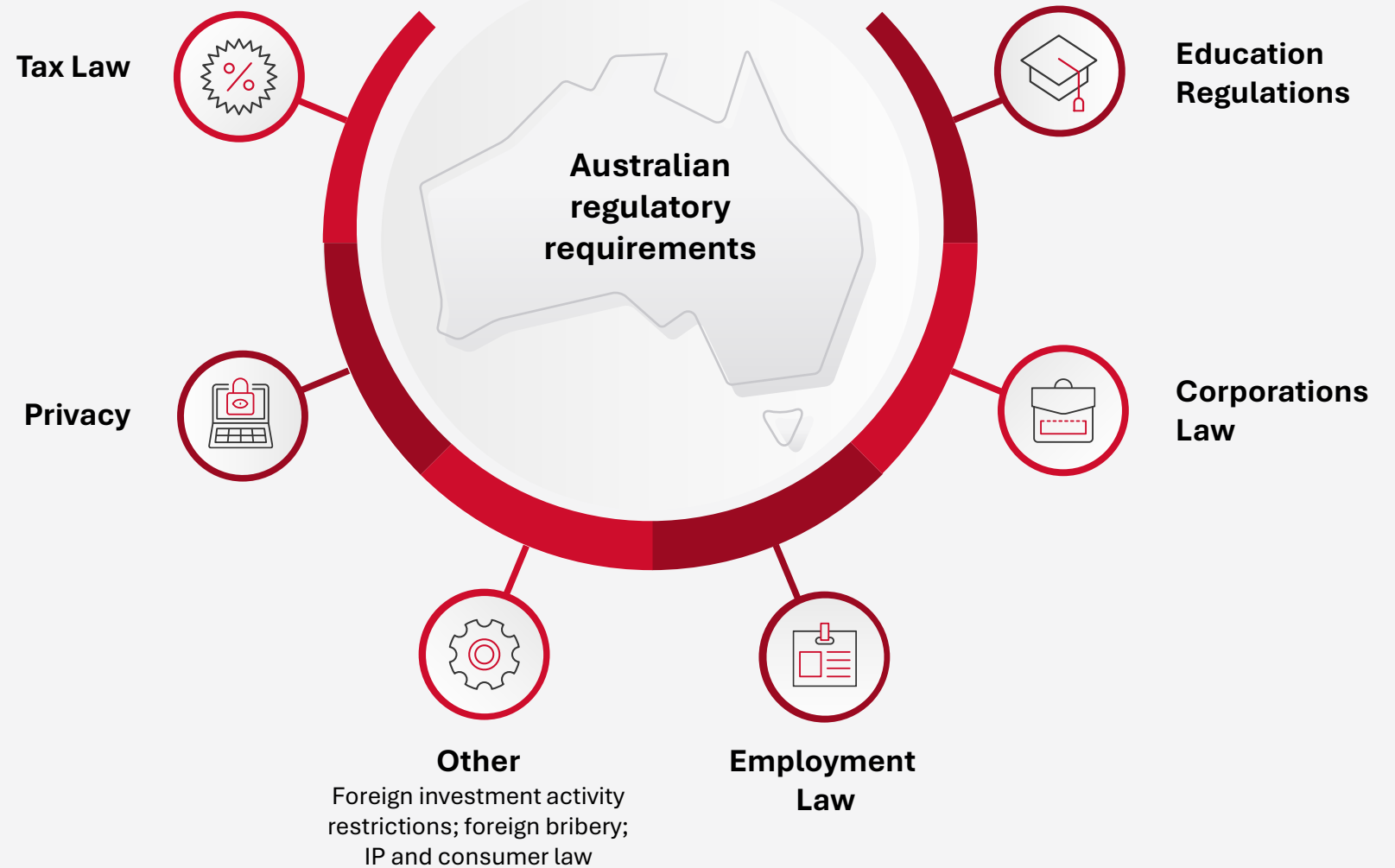
Penalties for offering or conferring awards offshore without authorisation

Notification of Changes

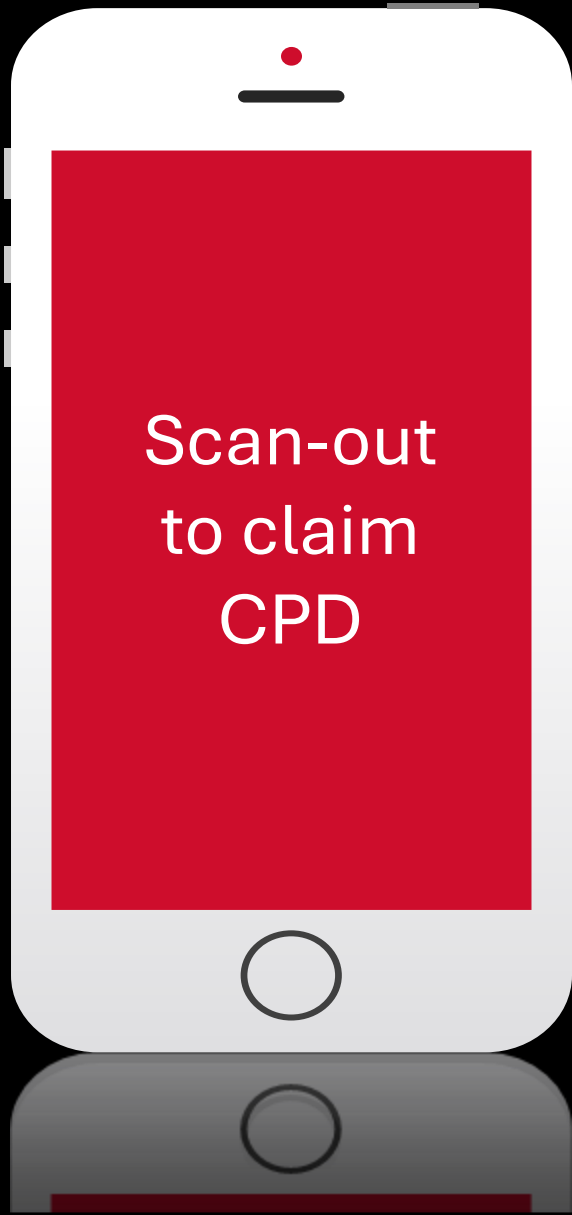
Providers must notify TEQSA of changes to, or new, offshore delivery arrangements

Australian legislation | Relevant for TNE Considerations

In addition to TEQSA regulations, there are a range of additional legal considerations to be considered prior to making a decision about TNE delivery.



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Your higher education regulatory guide



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