According to the Chinese Ministry of Education, China now has the world’s largest vocational education system with 9.28 million newly-enrolled students and 26.85 million registered students in 2018.

Vocational education in the country is separated into secondary vocational and higher vocational systems. In 2018, there were 11,700 vocational education institutions in the country including 10,300 secondary vocational schools and 1,418 senior/higher vocational colleges.

Internationalisation is a key aspect of the Chinese vocational education system. In addition to a wide range of joint international programs, there are also three Sino-Foreign cooperative higher vocational institutions in China as at June 2019, namely:

- Suzhou Centennial College
- Fuzhou Melbourne Polytechnic
- School of International Education & Europe-Asia Jiaotong, Zhengzhou Railway Vocational & Technical College

In order to meet the intellectual and human resource demands in key growing industries, China launched its Implementation Plan on National Vocational Education Reform in 2019. This follows a reported decline in China’s skilled labour force over recent years. Being part of a world-class VET system, Australian providers are well-positioned to contribute to vocational education developments in China.

Austrade’s China Skills Heat Map highlights the unique skills needs and priority skills discipline areas across several Chinese provinces. The report aims to provide an understanding of the vocational education landscape in China and to highlight opportunities for Australian providers intending to enter this market.
IMPLEMENTATION PLAN ON NATIONAL VOCATIONAL EDUCATION REFORM

In February 2019, China’s State Council launched its “Implementation Plan on National Vocational Education Reform”, detailing a plan for China’s vocational education system to cultivate high-quality workers and technical personnel. Key initiatives of the Reform Plan include:

• Piloting of a 1 + X certification system. This will allow vocational institutions and universities to offer an educational qualification plus a number of skills certificates.

• The development of a “credit bank” for vocational studies to record individual vocational education credits to enable the transfer and conversion of those credits towards other qualifications.

• An increase in vocational education opportunities for students who did not complete high school (both junior and senior high school), veterans, retired athletes, laid-off workers and returnee migrant workers.

• Promotion of the integration of vocational schools with industry and the establishment of vocational education groups.

The proposed priority areas include, but are not limited to:

- Modern Manufacturing
- Modern Service Industries
- Modern Agriculture

By 2020, China will:

• Expand higher vocational college enrolment by one million

• Establish 50 high-level advanced vocational schools with 150 key majors

• Establish 300 exemplary vocational education groups

Source: Australian Department of Education, Chinese Ministry of Education
LIAONING

GDP

In 2018, Liaoning achieved a GDP of over RMB 2.5 trillion, a growth rate of 5.7%. The Province’s per capita disposable income was RMB 29,701, a growth rate of 6.7%.

Population 43.6 million (2018)

<table>
<thead>
<tr>
<th>Number of Students Per 100,000 Population in Senior Secondary Level Education – 2017</th>
<th>Number of Students Per 100,000 Population in Higher Education – 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>2,303</td>
<td>2,859</td>
</tr>
</tbody>
</table>

Characteristics and Trends

As a province highly driven by traditional industries, Liaoning is keen to:

- Strengthen collaboration between industries and institutions.
- Strengthen vocational education in tech-driven services-oriented areas to meet the needs of the local economy.

The Provincial Government published *Suggestions for Implementation on Deepening the Integration of Industries and Education* in 2018 detailing its vocational education development plans.

Vocational Education Institutions

In 2017, Liaoning had 288 secondary vocational schools with a total enrolment of 314,385 students. Enrolments for the higher vocational sector reached 278,578 students.

There were 51 higher vocational institutions in the Province as at June 2019.

Development Goals of the Liaoning Government

- Encourage the development and establishment of disciplines related to industries including: Advanced Manufacturing; Information Technology; Energy Conservation and Environmental Protection and New Energies.
- Encourage multinational enterprises and vocational institutions to jointly establish international talent training bases and carry out overseas training.
- Support the cities of Shenyang and Dalian in building vocational education bases for advanced manufacturing.
- Support relevant schools to capitalise on the benefits of the China (Liaoning) Free Trade Pilot Zone and to carry out Sino-Foreign cooperation.

Key Opportunities for Australian Institutions

Joint programs and joint institutions; study tours and student exchange; teacher training; partnerships with education companies interested in entering the vocational sector.

Source: NBS, CVAE.com, Shenyang Municipal Government
LIAONING
PRIORITY DISCIPLINES

The Liaoning Government seeks to encourage the development of discipline areas related to the following industries:

- Advanced Manufacturing
- Information Technology
- Energy Conservation & Environmental Protection
- New Energies

Source: CVAE.com, Shenyang Municipal Government
BEIJING

**GDP**

In 2018, Beijing achieved a GDP of over RMB 3 trillion, a growth rate of 6.6%. The Municipality’s per capita disposable income was RMB 62,361, a growth rate of 8.8%.

**Population** 21.5m (2018)

<table>
<thead>
<tr>
<th>Number of Students Per 100 000 Population in Senior Secondary Level Education – 2017</th>
<th>Number of Students Per 100 000 Population in Higher Education – 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,245</td>
<td>5,300</td>
</tr>
</tbody>
</table>

**Vocational Education Landscape**

In 2017, Beijing had 89 secondary vocational schools with total enrolments of 74,511. Enrolments for the higher vocational sector reached 77,609.

There were 25 higher vocational institutions in the city as at June 2019.

Whilst the Beijing market has a wide variety of identified priority skills development areas, it should be noted that the market is a competitive one owing to the city’s role as an advanced education centre in China.

**Development Goals of the Beijing Government**

- By 2020, the Beijing Government seeks to:
  - Establish 10 world class vocational institutions.
  - Promote 100 leading major areas: The first list of 48 discipline groups was published in January 2019 and included such areas as urban rail, preschool education and rehabilitation nursing.
  - Develop 100 engineering colleges and master workshops through close collaboration with key industries.
  - Develop 20 professional training institutes for teachers.
  - Educate 1 million students annually.

A full list of identified priority discipline areas and institutions can be accessed [here](#) (in Chinese).

- Encourage localisation of international vocational systems such as the Australian TAFE, German HUG and British NCEE.

- Encourage the development of smart campuses, digital resources and MOOCs. Utilise the city’s digital resources sharing platform - BJlearning.

- Strengthen the joint development in the Jingjinji (JJJ) Metropolitan Region.

- Cultivate high-quality workers and technical personnel for Xiongan District, Beijing Airport and the 2022 Winter Olympics.

**Key Opportunities for Australian Institutions**

Joint programs with vocational institutions; study tours and student exchange; tailored master workshops; teacher training; partnerships with education companies; online education.

Source: NBS, People’s Government of Beijing
BEIJING PRIORITY DISCIPLINES

Beijing’s first set of priority discipline areas was released in 2019 and has been grouped into the areas below for ease of understanding. A full list of the Municipality’s priority discipline areas and priority institutions for development can be accessed [here](#) (in Chinese).

<table>
<thead>
<tr>
<th>Hotel Operation and Management</th>
<th>Advanced Manufacturing AI Manufacturing</th>
<th>Finance Technology Smart Accounting</th>
<th>Urban Gardening Urban Operation Intelligent Equipment Application Technology Urban Rail and Transit Urban Operation and Security</th>
<th>Engineering Measurement Technology Water Conservancy and Hydropower Engineering</th>
<th>Aged Care Nursing Rehabilitation</th>
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</thead>
<tbody>
<tr>
<td>Food Processing and Inspection</td>
<td>Restaurant Management Chinese Cooking and Nutrition</td>
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<td>Restaurant Management</td>
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<tr>
<th>Aviation Services</th>
<th>Automotive Maintenance Automotive Service and Management</th>
<th>Preschool Education Arts Education</th>
<th>Jewellery Identification and Processing</th>
<th>Arts and Crafts</th>
<th>Modern Funeral Technology and Management</th>
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<tr>
<th>Electrical Automation Equipment Installation and Maintenance Electronic Technology Application</th>
<th>Big Data Technology IT Software and Information Services</th>
<th>Communications Technology Digital Media Printing Technology</th>
<th>Veterinary Science</th>
<th>Environmental Testing</th>
<th>Security</th>
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</table>

Source: People’s Government of Beijing
SHANGHAI

**GDP**

In 2018, Shanghai achieved a GDP of RMB 3.27 trillion, a growth rate of 6.6%. The Municipality’s per capita disposable income was RMB 64,183, a growth rate of 7.1%.

**Population** 24.2m (2018)

<table>
<thead>
<tr>
<th>Number of Students Per 100 000 Population in Senior Secondary Level Education – 2017</th>
<th>Number of Students Per 100 000 Population in Higher Education – 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,099</td>
<td>3,498</td>
</tr>
</tbody>
</table>

**Vocational Education Institutions**

In 2017, Shanghai had 94 secondary vocational schools with a total enrolled student number of 106,110. Enrolments for the higher vocational sector reached 138,765.

As of June 2019, there were 25 higher vocational institutions in Shanghai, 12 of which are private institutions.

**Key Opportunities for Australian Institutions**

Curriculum licensing and co-development; teacher training; international industry body recognized or accredited joint programs; joint research.

**Development Goals of the Shanghai Government**

- By 2020, the Shanghai Government seeks to:
  - Increase total enrolments in secondary and higher vocational education to 140,000 and 140,000-150,000 students respectively.
  - Transform select universities into “practical” institutions, known as Universities of Applied Sciences (UAS).
  - Ensure half of teachers in vocational education have reached the “shuangshi” or “dual knowledge” standard – ie possessing both academic knowledge and applied skills.
- Strengthen the development of applied undergraduate courses in fields such as Artificial Intelligence, Aircraft Manufacturing and Big Data.
- Ensure no more finance related majors are added to secondary or higher vocational institutions.
- Address skills shortage by strengthening development in majors such as Pre-school Education and Aged Care.
- Ensure 90% of secondary and higher vocational education institutions participate in VET education groups and engage closely with industries.
- Note 148 leading secondary vocational education disciplines have been digitised for online delivery in 2018. The full list of these disciplines (in Chinese) can be found [here](#).

Source: [China Statistics Bureau](#), [Shanghai Municipal Education Commission](#), [CVAE.com](#)
15 priority discipline groups were listed in the Development Plan of Shanghai’s Modern Vocational Education System 2015-2030. The full plan can be accessed here (in Chinese). The Plan also listed priority disciplines for each of the Municipality’s districts.

Source: Shanghai Modern Vocational Education System Establishment Plan (2015-2030)
SICHUAN

**GDP**

In 2018, Sichuan Province achieved a GDP of over RMB 4.07 trillion, a growth rate of 8%. The Province’s per capita disposable income was RMB 22,461, a growth rate of 9.1%.

**Key Industries**

"5 + 1' Model": 5 pillar industries (IT, Equipment Manufacturing, Food and Beverage, Advanced Materials, Energy and Chemical) plus development of the Digital Economy.

**Population** 83m (2018)

<table>
<thead>
<tr>
<th>Number of Students Per 100,000 Population in Senior Secondary Level Education – 2017</th>
<th>Number of Students Per 100,000 Population in Higher Education – 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>2,889</td>
<td>2,339</td>
</tr>
</tbody>
</table>

**Vocational Education Institutions**

In 2018, Sichuan had 508 secondary vocational schools with total enrolments of 1.39 million. There were 74 higher vocational education institutions in the Province as at June 2019, 29 of which are private.

There are 4,147 vocational training and education organizations with a total enrolled student number of 2.11 million.

**Characteristics and Trends**

The first provincial-level culture and tourism education group in China – Sichuan Wenlv Vocational Education Group was established in July 2019.

**Development Goals of the Sichuan Government**

- By 2020, Sichuan Government seeks to:
  - Establish 15 leading provincial higher vocational institutions
  - Establish 100 practical training bases, and deepen the integration of education and industries
  - Establish 100 leading tertiary VET online courses
  - Establish 20 virtual practice centers
- Encourage the establishment of Sino-Foreign practical training bases, product R&D centers, and technology innovation centers.
- Support vocational institutions to explore the link between local professional courses and internationally accredited professional qualification certificates.
- Strengthen the development of aged care education. Explore the possibility of establishing combined education and aged care centres.

Source: The People’s Government of Sichuan Province, Administration of Market Regulation of Sichuan Province, Education Department of Sichuan Province, SCZJW
SICHUAN
PRIORITY DISCIPLINES

The Sichuan Government seeks to encourage the development of discipline areas related to the following industries:

- Advanced Equipment Manufacturing
- Aerospace and Aviation Technology
- Transportation
- Modern Agriculture

Source: The People's Government of Sichuan Province
HUBEI

GDP

In 2018, Hubei achieved a GDP of over RMB 39 billion, a growth rate of 7.8%. The Province’s per capita annual disposable income was RMB 25,815.

Population 59m (2018)

<table>
<thead>
<tr>
<th>Number of Students Per 10,000 Population in Senior Secondary Level Education – 2017</th>
<th>Number of Students Per 10,000 Population in Higher Education – 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>2,156</td>
<td>3,000</td>
</tr>
</tbody>
</table>

Vocational Education Institutions

In 2017, Hubei province had 289 secondary vocational schools with a total enrolments of 371,206. Enrolments for the higher vocational sector reached 537,510 students.

There were 60 higher vocational colleges in the Province as at June 2019.

Characteristics and Trends

Hubei’s capital city Wuhan launched the Wuhan Education Internationalization Three Year Action Plan (2018-2020) to further encourage international education development in the city. Some of the goals (at all education levels) include:

- 4-5 new TNE projects in the city by 2020.
- 30 new sister school partnerships established annually to 2020.

Development Goals of the Hubei Government

- By 2020, the Hubei Government seeks to:
  - Establish 120 high-quality secondary vocational schools.
  - Establish 25 high-quality higher vocational colleges.
  - Deepen industry and education integration: 80% of enterprises above a designated size will be involved in vocational education and training.

- Strengthen secondary vocational education capabilities in the Yangtze Xincheng area.

Source: NBS, Ministry of Education of the People’s Republic of China, EOL, Souhu, Wuhan Vocational Education Online
19 discipline groups were listed as priority disciplines in the *Hubei Province Action Plan for Innovation and Development of Higher Vocational Education (2017-2020)*. A full list of these discipline groups and priority institutions for development can be accessed [here](#) (in Chinese).

### Hubei Priority Disciplines

<table>
<thead>
<tr>
<th>Agriculture</th>
<th>Forestry</th>
<th>Animal Husbandry</th>
<th>Fisheries</th>
<th>Food and Drug</th>
<th>Biochemistry</th>
<th>Transportation</th>
<th>Energy and materials</th>
<th>Civil Engineering</th>
<th>Public Administration Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Water Conservation</td>
<td>Manufacturing</td>
<td>Resources and Environment Security</td>
<td>Digital Information</td>
<td>Textile</td>
<td>Finance Economics Trade</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine and Health</td>
<td>Tourism</td>
<td>Culture and Arts</td>
<td>Journalism and Communications</td>
<td>Education and Sports</td>
<td>Public Security and Justice</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: [Chinese Ministry of Education](#)
GUANGDONG

GDP

In 2018, Guangdong achieved a GDP of over RMB 9.7 trillion, a growth rate of 6.8%. The Province’s per capita disposable income was RMB 35,810, a growth rate of 8.5%.

Population 113m (2018)

<table>
<thead>
<tr>
<th>Number of Students Per 100 000 Population in Senior Secondary Level Education – 2017</th>
<th>Number of Students Per 100 000 Population in Higher Education – 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>3,128</td>
<td>2,454</td>
</tr>
</tbody>
</table>

Vocational Education Landscape

- Guangdong currently has the largest vocational education system in China.
- In 2019, there were 87 higher vocational institutions and 464 secondary vocational institutions in the province.
- 34 majors were identified as priority discipline areas for higher vocational education in 2018. A full list of these discipline areas can be accessed here (in Chinese).

Development Goals of the Guangdong Government

The Guangdong Government launched the Guangdong Vocational Education Three Year Action Plan (2019-2021) in March 2019, with the key theme of “capacity expansion, quality improvement and service focus.”

By 2021, the Guangdong Government seeks to:

- Increase the number of vocational degrees issued over 120,000.
- Consolidate the number of secondary vocational institutions from 464 to 350.
- Fully establish the Provincial Vocational and Technical Education Demonstration Base – Qingyuan.
- Strengthen the development of vocational education digitalization and increase digital teaching capacity.
- Strengthen collaboration with One Belt One Road countries and the Guangdong-Hong Kong-Macau Greater Bay Area.

Funds

The Guangdong Government has earmarked over 1 billion yuan to support vocational education development in 2019.

Source: NBS, People’s Government of Guangdong Province, Department of Education of Guangdong Province, Guangdong Higher Vocational Education Report 2019, Department of Education of Guangdong Province
GUANGDONG PRIORITY DISCIPLINES

Guangdong’s list of priority discipline groups for higher vocational education was released in 2019. A full list of priority disciplines and institutions for development can be accessed [here](#) (in Chinese).

<table>
<thead>
<tr>
<th>Automotive Marketing and Service New Energy Vehicle Technology</th>
<th>Jewelry Identification and Processing</th>
<th>Mechatronics Technology Electrical Automation Technology</th>
<th>Software Technology Information Security and Management Electronic Information Engineering Technology Computer Application Technology</th>
<th>Construction Management</th>
<th>Pharmaceutical Production Technology Laboratory Medical Science</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mold Design and Manufacturing</td>
<td>Applied Electronic Technology</td>
<td>Environmental Monitoring Technology</td>
<td>Hotel Management</td>
<td>Tourism Management Tourism English</td>
<td>Sports and Society</td>
</tr>
<tr>
<td>E-commerce Accounting</td>
<td>Financial Management</td>
<td>Marketing</td>
<td>Customs and International Freight</td>
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<tr>
<td>Fashion Design</td>
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</tbody>
</table>

Source: [People’s Government of Guangdong Province](#)
FUJIAN

GDP
In 2018, Fujian achieved a GDP of over RMB 3.5 trillion, a growth rate of 8.3%. The Province’s per capita disposable income was RMB 32,644, a growth rate of 8.6%.

Population 39m (2018)

<table>
<thead>
<tr>
<th>Number of Students Per 100,000 Population in Senior Secondary Level Education – 2017</th>
<th>Number of Students Per 100,000 Population in Higher Education – 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>2,717</td>
<td>2,352</td>
</tr>
</tbody>
</table>

Characteristics and Trends
Fuzhou and Xiamen ranks 1st and 4th respectively in visa lodgment numbers by city for the VET sector (FY 2016-17).

The first national conference for Automotive (including New Energy Vehicles) Operations and Maintenance for the 1 + x model was held in Fujian in May 2019.

Vocational Education Institutions
There were 51 higher vocational institutions in the Province as at June 2019.

Development Goals of the Fujian Government
By 2020, the Fujian Government seeks to:

- Develop 100 pathway courses between secondary and higher vocational sectors.
- Develop 50 VET online courses.
- Develop 5 simulation training centers.
- Develop 50 teacher training centers in collaboration with institutions and enterprises.
- Establish 200 specialized majors under 10 categories including Industrial Robots, Integrated Circuits, Optoelectronics, Creative Design and Aged Care Services.
- In the higher vocational education area, focus on Pre-school Education, Nursing, Health Services and Social Services.
- The 2018 list for priority discipline areas and projects can be accessed here (in Chinese).

Source: Development Plan of Modern Vocational Education in Fujian Province (2017-2020), Fujian Bureau of Statistics, Ministry of Education of the People’s Republic of China, NBS, Department of Home Affairs
Fujian’s list of priority disciplines for the higher vocational education sector was released in 2018. A full list of the priority disciplines and institutions for development can be accessed [here](#) (in Chinese).

<table>
<thead>
<tr>
<th>Priority Discipline</th>
<th>Department</th>
<th>Institute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traffic Safety and Operation</td>
<td>Traffic Engineering</td>
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<tr>
<td>Power Supply Technology</td>
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<tr>
<td>Manufacturing and Mechanical Equipment AI Manufacturing</td>
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<tr>
<td>Forestry Economy</td>
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<td>Construction Engineering</td>
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<tr>
<td>Modern Agriculture Smart Agriculture</td>
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<tr>
<td>Maternal, Infant and Aged Care</td>
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<td>Health Services</td>
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<td>Medical Technology</td>
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<tr>
<td>International Trade and Business Modern Trade Services Arts and Crafts Trade Cross-Border E-Commerce</td>
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<td>Preschool Education Primary School Education Cultural Education</td>
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<tr>
<td>Software Technology New Generation Information Technology Intelligent Technologies and Applications VR Technologies</td>
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<td>Modern Logistics</td>
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<td>Modern Creative Design Culture and Creativity Design Cultural Communication and Creative Design Art and Design</td>
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<td>New Energy Automotive</td>
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<td>New Material and Marine Chemistry</td>
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<tr>
<td>Communications Technology Digital Media Printing Technology Photography</td>
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<tr>
<td>Textile Application Technology</td>
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</tbody>
</table>

Source: [Department of Education Fujian Province](#)
ABOUT AUSTRADE

The Australian Trade and Investment Commission (Austrade) is the Australian Government’s international trade promotion and investment attraction agency.

Austrade delivers international marketing and promotion services to the Australian education sector. This includes positioning Australian education through the international education brand, Future Unlimited. Future Unlimited highlights the global relevance, practicality and quality of Australian institutions, along with their innovation, creativity and focus on the future.

Austrade also supports Australian education providers through a range of information, advice and tailored services to support their international education engagement strategies. This includes the delivery of accurate and timely market intelligence and opportunities through the Market Information Package, an online portal available on a subscription basis to eligible institutions.

➢ For key market insights, barriers and opportunities for transnational (TNE) programs and curriculum licensing in the vocational education and higher education sectors in China, Please refer to the 2019 Austrade Transnational Education Report: Transnational Education: Knowing our Competitors.
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