Consortia opportunities and pathways for Australian SMEs delivering education and training services
February 2018
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Ernst & Young was engaged on the instructions of the Australian Trade and Investment Commission ("Austrade") to prepare a research report on consortia opportunities and pathways for Australian small and medium-sized enterprises (SMEs) delivering education and training services ("Project"), in accordance with the work order dated 26 May 2017.

The results of Ernst & Young's work, including the assumptions and qualifications made in preparing the report, are set out in Ernst & Young's report dated 1 November 2017 ("Report"). The Report should be read in its entirety. A reference to the Report includes any part of the Report.

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The Report is essentially based on interviews conducted with 50 industry participants from across government, industry players, and VET, ELICOS, Edtech and higher education segments. It is also based on consultations with international education experts and secondary research undertaken by us.

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This report has been commissioned by Austrade and does not necessarily reflect the official views of Austrade.
Executive summary

In 2016 Austrade launched the Australian International Education 2025 (AIE 2025) market development roadmap – the long term market development roadmap for the Australian international education, skills and training sector. The AIE2025 Roadmap has been co-created by Australia’s international education sector, together with Austrade and other arms of government, to complement Australia’s National Strategy for International Education. AIE2025 identifies what the Australian industry collectively needs to do to excel globally on a scale like never before.

Borderless and offshore education was identified as a key driver of growth for the Australian education sector. Competing at scale was recognised as one of six game changers for the industry with the potential to give Australia’s international education sector a key competitive advantage. However, it is also acknowledged that competing at scale is one of the leading challenges facing Australian small and medium enterprises (SMEs) in the Vocational Education and Training (VET), English Language Intensive Course for Overseas Students (ELICOS) and Educational Technology (EdTech) sub-sectors.

Assisting the Australian education and training sector capture a greater share of this growing offshore opportunity is the focus of this report. Working as part of a consortium provides a means to deliver on a larger scale, and also an opportunity to partner with other providers with unique strengths to form a world-leading offering targeted to the needs of the market. It has the potential to propel Australian providers and companies into much broader and lucrative markets.

To date, working in consortia has been used in only a few cases successfully by Australian education and training companies to respond to international opportunities. However, our research has found forming consortia allows members to address challenges of scale, breadth of capability, and manage risks and share costs associated with market entry. Earlier research conducted by Austrade in 2016 found that awareness of international opportunities, and understanding consortia business models and best practices are the key barriers preventing Australian SMEs from pursuing and building consortia for borderless and offshore opportunities. To assist SMEs overcome these challenges and enhance the industry’s international competitiveness, EY was be commissioned by Austrade to develop a report and industry toolkit that will support industry to leverage consortia to expand into offshore markets.

To understand the underlying issues behind the slow uptake of the consortium model among Australian education and training SMEs, an extensive interview process was completed, involving more than 50 industry participants from across government, peak industry bodies, and the VET, ELICOS, Edtech, and Higher Education segments.

Alongside these interviews, international education experts were consulted and research undertaken to identify case studies of successful and failed consortia in education globally, to identify both lessons learned and best practice. Through this research, two types of approaches to consortium formation were identified. The first is the proactive consortium approach, whereby members come together proactively and first determine the size, scale and scope of their combined service offering and value proposition. After this step, opportunities are collectively identified that suit the consortium members, and these are then pursued jointly and specifically as a consortium.

The second model is currently more common in Australia and follows an opportunistic consortium approach. Here a consortium is formed after a specific opportunity is identified or presented, and companies agree to work together to jointly pursue. The consortium is generally formed as a result of individual members not being able to deliver the project independently. Members are typically already known to each other, given the often short lead times to meet tender and customer deadlines, or receive some government assistance with forming the consortium. This approach requires a comparably lower upfront investment compared to the proactive approach, and can be viewed as a lower risk method of seeking international education opportunities in consortia.

Three common consortia business models were also identified:

1. Industry focussed consortia:

   In this business model, education and training providers and industry players work together to bring specific expertise to deliver a holistic skills solution for a particular industry. Industry members provide insights for course design relevant to the target country and potential job outcomes for students. Education and

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2. Refer to Appendix 1 for details of participants interviewed
training providers bring curriculum and delivery experience. This model is often used for skills development in emerging economies for specific industries where practical job outcomes are valued above formal qualifications. Specific examples include German automotive companies and VET providers working together to offer workplace skills solutions in India.

2. Edtech-education provider consortia: In this model Edtech companies, education and training providers, and potentially industry players all work together to deliver technology enabled solutions. This model of consortium is typically used for corporate, industry or professional training courses delivered online. Edtech companies bring to the consortium a greater international focus, agility, online delivery solutions, plug and play platforms, and other tools for student engagement like gamification. Education providers bring content, tested curriculum and academic rigour.

3. State and territory government supported consortia: An increasingly common model in Australia is the state or territory government supported consortium, where education and training providers are all located in a state or territory. The state or territory government may provide business development support to identify opportunities, bring suitable parties together, and potentially allocate funding to support joint marketing and promotion. This government support also brings credence to the consortium especially in developing economies where the imprimatur of government is important. The assistance in consortium formation and early support enhances the consortium’s chance of success. This model is often used in response to government requests for proposals (RFPs) or geographical specific pursuits.

Through research and interviews with industry and government representatives, we found the success of adopting a consortium based business model depends on a number of unique factors including:

- Using the right channels to identify suitable opportunities and partners - acknowledging the opportunity has to be sufficiently complex to warrant a consortium approach;
- Conducting sufficient due diligence on the opportunity to ensure all members of the consortium can contribute and benefit;
- Using appropriate legal, business and operating models for consortia; and
- Having quality assurance processes in place to monitor ongoing project delivery by multiple providers and measure successful outcomes, ensuring both the customer and the consortium members’ needs are met.

The toolkit, published separately by Austrade, provides a step-by-step guide for Australian education, training and technology providers to support the use of a consortium model to pursue borderless and offshore opportunities. Based on the research findings, a seven step continuum has been developed as a possible way of working in a consortium. These steps are:

1. Commit to a consortium approach, including seeking board, management or executive approval
2. Identify international opportunities and partners, including early identification of the unique value each partner will bring to the consortium
3. Analyse opportunity feasibility ensuring all consortium members will contribute and benefit
4. Respond to the opportunity, articulating consortium members’ unique strengths and depth of capability
5. Formalise the consortium structure, including legal and financial considerations
6. Deliver to the opportunity leveraging a team approach
7. Review outcomes and adjust the consortium as necessary.

We have found through our research that the sequence of these seven steps may be fluid, for example, an opportunity may present itself before executive approval to work in consortium has been obtained, but the factors for consideration to maximise chances of success are consistent.

Through our research we found that, there maybe opportunities to further support the education and training industry with consortium formation by developing new industry tools. This could include conducting a stocktake of the supply side capabilities of the education and training industry to develop a database of Australian industry capability. This would allow Austrade and/or state and territory governments to connect potential consortium partners with suitable opportunities.

To support this there is a need to develop a platform to systematically disseminate consortia opportunities to the Australian industry, perhaps as an extension of Austrade’s Market Information Package (MIP), which many industry players already subscribe to.

Finally, communicating success and sharing best practices and case studies through seminars, workshops and media is an important tool to encourage greater consortium usage and learnings.
1.1 Background to this report

Australia is an attractive location for international students and the third largest destination country for international students after the USA and UK. Education services exports contributed $28bn to the Australian economy in 2016-17. While the specific contribution of off-shore education and training exports to Australia is not measured, the size of the global borderless and offshore education market is estimated to soar to a billion learners by 2025. Over 1,100 online education providers in Australia generate $A5.4 billion in revenue with the industry rapidly expanding in the last five years. A growing portion of this revenue can be attributed to international exports.

In 2016, Austrade launched the Australian International Education 2025 (AIE 2025) market development roadmap, which seeks to deliver “education and skills to meet the needs of the world’s one billion students in 2025”. The AIE 2025 roadmap identified six game-changers that could give Australia the edge in realising these aspirations.

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Diagram 1: AIE 2025 game changers

- **Compete at scale**
  How do we form the scale required to compete to excel?

- **Unleash technology**
  How can the sector harness technology and data to improve their offerings?

- **Embrace borderless learning 24/7**
  How do we use new channels and approaches so that ‘2025 students’ can access the best of Australia’s education offerings - when and where it will optimise their learning outcome?

- **Sharpen market focus**
  Where is our greatest comparative advantage and how do we maximise its impact on our approach to market?

- **Attract global capital**
  How do we ensure that growth aspirations are supported by sufficient investment to sustain growth and improvement?

- **Maintain an Australian edge**
  What unique element of the Australian education approach can we capitalise on to build our reputation and attractiveness as a provider of learning?

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3. Australia is third largest destination country for international students after US and UK according to OECD “Education at Glance 2016”
4. ABS (2016). International Trade in Services, by Country, by State and by Detailed Services Category, Calendar Year, 2016 (Cat. no. 5368.0.55.003)
6. Austrade Education Technology industry report, August 2017
The context of this report within the National Strategy for International Education 2025

Australia's international education strategy, issued by the Australian Government, calls for the nation to be more innovative, future-focused and globally engaged. It is based broadly on three pillars:

1. Strengthening the fundamentals of Australia's education, training and research system and our regulatory, quality assurance and consumer protection arrangements;
2. Creating transformative partnerships between people, institutions and governments, at home and abroad; and
3. Competing globally by responding to global education and skills needs and by taking advantage of emerging opportunities.

The use of a consortium based business model fits into Pillar 3, Action 9.3 “Identifying and responding to new opportunities” of competing globally. Connectivity and scale improvements are needed to compete effectively on a global scale.

The culture of ‘compete at all cost’ must be re-imagined, with a greater importance placed on the development of a cohesive ‘Brand Australia’. An integrated approach to the pursuit of international education opportunities is required to ensure Australia competes effectively against other leading nations in the sector, including the UK, Germany, Japan, and other parts of Europe.

This report focuses on the ‘compete at scale’ game changer and the use of consortia, partnerships and collaboration to enable the Australian education and training sector to service global-scale demand.

Using consortia to promote competing at scale has been used by a number of countries including the UK (Department of International Trade) and Germany (Germany Trade & Invest) who are recognised by industry as being particularly apt and successful in this paradigm.

Austrade led industry consultations in 2016 which confirmed a strong appetite among Australian SMEs to pursue offshore opportunities. However, a lack of current capability and capacity to do so were cited as two main barriers preventing activity. Awareness of opportunities, business models and understanding best practice were the key barriers to pursuing and building consortia.

Following these industry consultations, Austrade undertook a further survey in 2016 to understand the problems facing education providers in considering consortia business models. Whilst the vast majority of respondents were interested in international markets, and understood the obvious benefits of consortia as an applicable business model, only half had actually attempted to form a consortium. Ultimately, only thirty percent had experienced some consortium success, and only a surprising three percent were achieving success using a using a consortium based business model.

Next steps identified from the survey and consultations

1. Understand the barriers to partnerships and consortia
2. Develop supporting tools
3. Identify and qualify opportunities

The natural conclusion arising from the survey results was that an industry toolkit to support the consortium formation process was essential. This would allow more education and training companies to form consortia more regularly, supported by a greater understanding of the process including models and factors for consideration.

## Consortia opportunities and pathways for Australian SMEs delivering education and training services

### Chart 1: Survey respondents’ consortia experiences

- **All relevant respondents (n=75):** 100.0%
- **Interested in international opportunities:** 93.0%
- **Identified benefits to consortia in pursuing international opportunities:** 91.0%
- **Pursued consortia opportunities while pursuing international opportunities:** 53.0%
- **Successful consortia experience:** 28.0%
- **Experienced, with regular consortia success:** 3.0%

**Vast majority are interested in international markets and see obvious benefits consortia can bring**

**yet only half attempted to form consortia**

**...and only 28% have experienced some success**

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### Notes

11. Austrade survey 2016, of the 75 respondents 66 were VET / ELICOS providers
Case Study

UK Department of International Trade:
An active supporter of UK education consortia

The Department provides timely sector briefings for UK providers, and focuses heavily on the Middle East as a region of interest.

Consortia support: bid support and consortia formation assistance

Examples: In 2014, the department supported three consortia in their successful bid to win four contracts to deliver technical and vocational training in Saudi Arabia. The consortia include the following:

1. Oxford Partnership: A consortium of VET and education service providers,
2. Hertvec: A consortium of VET and university level providers,
3. FESA: A consortium of UK colleges and training providers.

The department played a crucial role in bringing together partners for the consortium, and the implicit government support made the combined bids considerably more attractive in the eyes of the Saudi Arabian government.
1.2 Methodology of this study and toolkit

Objectives
This study and report were designed to enable Australian providers and companies to ‘compete at scale’ by using consortia business models to drive partnerships and collaboration to empower the Australian education and training sector to service global-scale demand.

Scope
EY was tasked to:

- Identify the benefits to members of working in consortia, alongside the challenges faced to achieving success;
- Outline standard consortia business models used in Australia and internationally in education and training that have succeeded;
- Detail opportunities in the education and training sector across other economies, regions and sub-sectors;
- Create a toolkit to support best practice consortia formation, including a checklist of factors to consider and links to useful advice and information,
- Suggest how providers can use the resources provided by Austrade to support better outcomes from the consortium process.

Investigation of key issues
To understand the underlying issues behind the slow uptake of Australian consortia formation. These interviews were completed over a two month period from June to August 2017 with C-suite executives and senior management of education and training organisations.

Chart 2 provides a summary of interview participants and Appendix 1 provides a detailed listing of all interviewees.

Synthesis and analysis
International experts across the education sector were also consulted to identify successful and unsuccessful international consortia examples, lessons learned, and best practices employed by successful consortia. We also identified typical business models successfully used by other key education export countries including the UK and Germany and in important ‘user’ markets such as India and China. The results of the extensive interview process and research were collated to write this report.

Toolkit
A toolkit to provide practical advice on building consortia to respond to offshore and borderless opportunities to Australian SMEs in education and training was prepared as a separate document. This toolkit has been prepared as separate document and can be found at www.austrade.gov.au/Australian/Education.

Dissemination
Workshops with the education and training industry will be held across Australia to support further learning, promotion of the potential of consortium for the sector, and to hear from those already using this approach for international business development and project delivery.

Consortium /kan’sɔːtʃəm/

- Macquarie dictionary defines Consortium as “an association or union”.
- Cambridge dictionary defines Consortium as “an organisation of several businesses joining together as a group for a shared purpose”.

In the context of this report we see a consortium as a collaboration between multiple education and training providers or between education providers and other interested parties, such as industry and peak bodies, commercial companies working in a technical field, or technology enabling companies (Edtech).
2.1 Benefits of a consortium model

The benefits of a consortium model were identified based on an extensive interview process completed with more than fifty industry participants. Chart 3 provides a summary of the responses. The details of benefits are outlined below:

2.1.1 Reducing the risk faced by an individual organisation

A common theme which makes small to medium education and training companies hesitant to pursue an international opportunity is the risk associated with the process – funding requirements are typically significant, resources must be diverted from domestic business, and reputational risk exists when working in a new market with new, unknown partners. In the context of a relatively uncertain revenue stream from the venture, many operators are therefore unwilling to further pursue international opportunities in isolation.

The use of a consortium business model is a good way to reduce risk. Because members typically share the financial and resource burden, the contribution on behalf of each consortium member towards opportunity pursuit is lower.

“There is potentially less risk on an individual provider basis if a consortium business model is used, and this can make the opportunity more attractive to our oversight board.”

TAFE provider

2.1.2 Improved brand positioning

By using a consortium model, education providers can broaden their appeal within a target market, through improved brand positioning. This can be achieved in a number of ways.

First, the increased opportunity for knowledge sharing can result in collaborative curriculum design, and improvements to course quality. Brand recognition can also be furthered using a consortium business model, through leveraging well-regarded brands to drive student demand. This has been used to good effect by education technology companies such as Open Learning, who frequently use a consortium model to bring universities with strong brands on to their platform.

“A consortium works well when there is a strong lead that understands the target market, is well respected in country and has been successful. Their brand can help the group and lead to new opportunities.”

Education Lead, state government export department

Second, appeal can also be widened within the student population. Partnering with a well-regarded local institution can allow a smaller education provider to leverage their partner’s appeal within the delivery country to drive higher levels of student demand.
Finally, Registered Training Organisations (RTOs) can bring strong capability in niche training areas. This coupled with the strong brand of highly regarded Australian providers such as TAFE can assist in driving corporates and students to the consortium’s programs. Feedback from those surveyed found that partnering with an institution such as a TAFE provider indicates an implicit guarantee of quality in the mind of a potential student or government, particularly in Asia.

2.1.3 Increasing competitiveness through an enhanced product offering

Capability and international competitiveness can be increased through consortia formation where partners bring complementary capabilities. This allows for an enhanced product offering across an industry or a segment – more than one small provider can deliver individually. It also allows the consortium as a whole to provide a holistic solution to an often large scale requirement. According to those surveyed, there is an increasing demand for a ‘one-stop shop’ that meets the multiple requirements of large customers. This extends to both industry and geographic driven education requirements.

Many of the TAFE providers interviewed reported the ability to provide a broad scope of work and solutions that leveraged the TAFE network was something that gave them a competitive advantage when bidding for tenders. Another example of an enhanced product offering is a group of non-competing education and training providers that work together to deliver a holistic education and training solution to global mining companies across the mining value chain – from executive programs and engineering degrees, through to mine site skill development programs and work place safety.

“A consortium is an excellent opportunity to be viewed as a one-stop shop in a market – this can be crucial during the tendering process.”

Multinational education provider

This is valued by many countries, as the ability to deliver wide-ranging education and training solutions using a ‘one-stop shop’ model minimises red tape, and is generally considered preferable by the customer. For them it potentially means one contract and places the project management and coordination role firmly with the consortium members.

2.1.4 Meeting requirements to pursue larger scale projects

In many emerging markets, due to large populations and significant training requirements, the ability to deliver projects on a large scale is a key consideration in the process of successfully securing tenders or contracts. Typically, international organisations or governments running large tenders desire a relatively simple process, and bidders who are able to deliver at high volumes are at an advantage.

Scale is also important to counter issues that can be country-dependent. For example, cash flow issues are often encountered in markets such as India where pricing is sensitive and margins are typically lower. This forces scale to be generated through partnership models, so the initial outlay and investment in business development and project delivery is spread out across partners.

In addition to financial considerations, another key consideration to the Indian government is the ability to provide a scale solution to a large number of students or training participants. Over three quarters of the interviewees indicated that using consortium models helped address the scale issues when responding to overseas opportunities. A number of ELICOS providers also reported that there is a need for English language training providers to work together to deliver large English teacher training programs in markets including China and South America.

2.1.5 Identifying new and additional opportunities

A consortium model also allows new opportunities or business leads to be directed to members within the consortium that are best suited to meet specific opportunity requirements.

Members gain access to opportunities that they may not have been aware of outside the consortium, and the consortium itself benefits by developing a reputation as a good avenue through which to funnel opportunities and requirements. This increases the pool of opportunities available to all members. This method has been employed by a number of respondents. For example, one group of state-based RTO providers who formed a consortium, meet monthly to share leads and make referrals between consortium members. Interview responders reported that this is important for developing trust between members and enhancing benefits to all.

Lead sharing is also crucial for developing an ongoing in-country presence: many respondents repeatedly mentioned the difficulties in finding opportunities without regular and consistent business development activities in country. In-country representation and regular travel are often too expensive for smaller providers to fund alone. Through sharing this focus amongst members more leads can be identified.

14. Based interviews conducted by EY with industry participants for this report
“We were too small to pursue opportunities in Latin America, we simply didn’t have the capacity to train the volume of teachers needed. By working with other Australian providers we at least had the opportunity to compete against markets like the US and UK.”

Private ELICOS provider

“We setup a consortium for a specific opportunity which didn’t materialise. However, we have since used the consortium for business development for joint marketing and referring opportunities to partner.”

Private RTO
Case Study

Trade and Investment Queensland (TIQ) supports education institutions in forming consortia for overseas opportunities

Queensland has been active in supporting international education for some time, and the state has identified the pursuit of international opportunities for small to medium enterprises as a priority for the sector into the future. TIQ provides support including:

1. Opportunity Identification: TIQ actively sources opportunities through its international network, and shares these opportunities with Queensland-based education providers;
2. Identifying partners: TIQ actively connects providers to one another, and serves as a ‘matchmaker’, mitigating some of the risk around partner identification and consortia formation;
3. Financial support: The IET Partnerships Fund provides funding between $5,000 and $150,000 to Queensland-based education providers who form a consortium for international education that meets the objectives of the fund.

Case Study

Victorian government supports RTOs with consortia formation for overseas opportunities

Education is a major contributor to the Victorian economy, and Victoria is a major market for international education: 31% of international students in Australia study in Victoria. The Victorian government recognises that more can be done to develop offshore opportunities and remove the challenges to working in consortia. It is active in supporting Victorian education, training and technology providers. This includes:

1. Opportunity qualification support: the Victorian Government assists in identifying opportunities and providing introductions to international customers, and assists in positioning Victorian providers and companies;
2. Identifying consortia partners: the Victorian Government provides support in identifying potential partnership opportunities to assist in consortia formation.

A number of industry stakeholders reported that support on consortium introduction and formation issues made the consortium undertaking more viable, and the venture had less risk associated with it. This was important in securing support from oversight committees and senior management.

15. Interview with TIQ representatives and TIQ website
17. Interview with representatives from DEDJTR and Victorian TAFE Association
Case Study

NSW Partner Projects Program

StudyNSW co-funds (on a matched funding basis) projects that enhance the experience of international students in NSW. These projects need to be implemented by a consortium of education providers and other organisations, and need to ensure benefits reach a broad range of international students. Global Scope is an example of a project funded under the Partner Projects Program. The key criteria for funding is that the consortia projects, which are ideally cross-sectoral, must bring benefits to the sector as a whole rather than one individual institution. Please see a list of past projects here.

Global Scope – Edutech

NSW Global Scope is a pilot project jointly delivered by a consortium of StudyNSW, EY, Sydney-based education services and education technology start-up, Intersective and the NSW universities. It is designed to enhance the experience of international students in Australia, and is a good example of a consortium supporting the on-shore education segment. Global Scope offers a Work Integrated Learning experience to international students across organisations in NSW, including the NSW public sector. Information about the Global Scope program is on the StudyNSW Youtube channel.
2.2 Challenges of consortia models in education and training

Consortia – good in theory but limited real world experience in the sector

Whilst most (91%) of the Austrade survey respondents indicated a desire to pursue consortia, only slightly more than half had attempted to do so. The interview process identified a number of reasons preventing providers from using consortia. These include:

1. A lack of understanding on how best to approach the business model;
2. An inability to find trusted partners; and
3. A lack of risk appetite by senior management/boards of education providers.

Further, of those who have attempted working in a consortium, only slightly more than half had a successful experience. The interview process conducted as part of this project suggests that this figure may even be overstated. A number of respondents interviewed reported negative experiences. Specifically, these included:

1. Partners failing to follow through on promised economic or staffing contributions;
2. The level and degree of the government’s role and support is poorly outlined;
3. A lack of understanding of the nuances and dynamics of other cultures creates issues around costs and revenue.

Competition in the international education space comes from mature economies including Germany, UK, Japan, US and Canada. These nations have been active in the international education market for some time, are well-regarded in the vocational education and educational technology space, and recognise education as a key part of their export mix.

The Austrade consultations and survey, combined with the EY interviews, confirmed that Australian providers need to be prepared for the scale that offshore education delivery requires. There is consensus that consortia models can help smaller Australian providers deliver to the scale required in key offshore markets, noting the opportunity exists in primarily emerging economies.

AIE 2025 notes that a greater degree of connectivity and scale is required, necessitating Australian providers to work together to meld their individual strengths into unique offerings, propelling to the forefront of global education market “Brand Australia” during the process. This can only be achieved by providing support to education providers, which was acknowledged by the majority of respondents across higher education, VET and ELICOS in the initial Austrade survey, and is a theme that echoes across interviews conducted for this report.

“Understanding cultural differences is crucial: even Germany, a leader in international education, has struggled to implement its education model in Mexico, because it didn’t fully understand the cultural nuances.”

Head of education peak body

Case Study

Northern Consortium UK: A successful feeder program for British higher education

The Northern Consortium is a long running example of education providers collaborating with government to deliver courses to a government tender. Initially, the program was targeted – it was intended to design and deliver a split degree programme for Malaysian government sponsored students. Since its establishment in 1987, the program has expanded rapidly, and courses are delivered worldwide spanning Asia, the Middle East, Africa and Latin America.

Importantly, student outcomes were very positive, and this has contributed to ongoing demand, unlike other consortia which have waned in popularity over time. 91% of the cohort passed their first year, and enrolments were up ~7% in 2015-16.

Members are well regarded. They include Manchester University, the University of Bradford, the University of Kent, and the University of Leeds. Additionally, provider partners are used to give access to new markets: Kaplan now delivers the program in Japan, China and Kurdistan.

19. https://www.ncuk.ac.uk/ and press articles
Chart 4: Desire to pursue consortia model for international opportunities

<table>
<thead>
<tr>
<th>Sector</th>
<th>Higher Education</th>
<th>VET</th>
<th>ELICOS</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. of respondents</td>
<td>9</td>
<td>51</td>
<td>15</td>
</tr>
</tbody>
</table>

% of respondents who selected “Achieve scale to pursue larger opportunities” when answering the question: “For your organisation, what do you see as the most significant benefits of forming or participating in consortia?”

- Higher Education: 60%
- VET: 64%
- ELICOS: 65%

20. Austrade survey 2016, of the 75 respondents 66 were VET / ELICOS providers
Consortia opportunities and pathways for Australian SMEs delivering education and training services

3.1 Approaches to consortia formation

Before determining a relevant model, consortia fall in to two predominant groups of formation: proactive and opportunistic. Each has a different methodology and approach, and is best suited to different circumstances.

The proactive approach:
Members form consortia prior to identification of an opportunity, and instead first determine the size, scale, and scope of their combined offering. This will also involve a loose formalisation of the collective. Following this, the group will then identify opportunities and target them as a formed consortium. This method is well-suited to members with sound financial backing, who are able to view international education as less of a risk.

Examples include Online Education Services (OES) and Swinburne, as well as various Queensland-based consortia, who formed in response to a recognised need to work together given the size of international opportunities, and support by the International by the International Education and Training (IET) partnership fund promoted by Trade and Investment Queensland.

Opportunistic or reactive approach:
In contrast, using an opportunistic or reactive approach, members form a consortium in response to a specific customer inquiry or market opportunity. This means lower initial outlay for the consortium members in terms of marketing and planning, and can allow opportunity identification overseas with less upfront risk. This may be more palatable to oversight committees as it responds to real demand. In most cases, core members are already in contact through existing networks or Australian projects. Often, however, the short lead times due to bid or customer requirements mean there is insufficient time is available to conduct thorough member identification, diligence and negotiation.

Examples of this approach include the Victorian Oil and Gas consortium which formed initially in response to an opportunity but now continues to work together, and the UK Colleges of Excellence in Saudi Arabia (Section 4.2).

“We engaged a strategy consulting firm with a strong education practice to investigate opportunities in South-East Asia, and the quantitative analysis produced gave us a great deal of confidence to pursue the opportunity.”

Private RTO

3.2 Consortia models

Once the consortium formation approach has been understood and decided upon, interested consortia participants should understand the typical models used. The three predominate models used to pursue international opportunities are:

3.2.1 Industry-focused consortia

In this consortium model, education providers and industry come together to provide solutions focused on the training needs for employees of a particular industry. The industry members provide insights into training requirements and course design, and can often be the end-user. The education provider members contribute curriculum and training capabilities. This model is highly applicable in developing economies which require specific, and often highly specialised skillsets, and which may also require specific facilities to deliver training.

Benefits of this model include strong job outcomes for graduates, industry assistance on relevant curriculum design, and strong industry recognition of the course delivered, given the high level of collaboration. Successful consortia have employed industry partnerships to develop niche, industry specific education as part of ongoing professional development, or to guarantee job placements for students, in turn allowing industry to develop a skilled workforce in-country.

Collaboration between industry and education providers has been used widely in India by German industry players, including Bosch and Volkswagen, leveraging their global supply chains. Students are trained in technical disciplines by vocational education providers in industry facilities, and are often placed into employment with the sponsoring company upon graduation.

Summary of the model:

- **Members:** Industry focused education providers and industry players bringing specific expertise to deliver a holistic solution for a particular industry.
- **Value proposition:** Industry members provide insights for course design relevant to the target country and potential job outcomes for students. Education providers bring curriculum and delivery experience.
- **Typical solutions/opportunities:** Skills development in emerging economies for specific industries.

This model has been used successfully by the following education providers:

- CPDlive & Public Works Engineering Australasia
- JMC Academy
- The Malka Group - has a partnership with Revlon International
New consortium: Defence Industry Education & Skills Consortium (DIESC)\textsuperscript{21}

DIESC, an initiative of a cross-state group of universities, vocational education providers and industry bodies was formally launched on 4th October 2017 at Pacific 2017 (an international maritime exposition). The consortium will focus on providing education and skills for the defence industry sector covering engineering, ICT, health and safety, with initial focus on the naval shipbuilding arena.

The consortium members are:
- The Defence Teaming Centre
- The University of South Australia
- The University of Adelaide
- Flinders University
- RMIT University
- Edith Cowan University
- TAFE SA
- South Metropolitan TAFE
- The Indigenous Defence Consortium

Education offerings of the consortium include:
- Vocational skills education and training
- Higher education
- Short courses and professional education

Germany in India: a market leader in industry-based learning in India\textsuperscript{22}

Cooperation between Germany and India in the VET Sector is long running. Since 2008, a joint working group consisting of German and Indian ministries has cooperated on incorporating dual principles of training, development of curricula in targeted sectors, and the development of training institutes targeted towards industry requirements. In 2015, the Indian government approved the country’s first integrated program to deliver skills training countrywide. By 2022, the Indian government is targeting a skilled workforce of 400 million people\textsuperscript{23}.

Key initiatives:

1. **German industry focused training centres:** Courses are divided into practical and theoretical components, of which the vast majority is practical (70-80\% of course time), and take place in companies as part of the actual production cycle. Training is based on a compulsory curriculum, adapted to the requirements of the training company. Training salaries are paid to those undertaking the ‘apprenticeship’. Successful examples include the Volkswagen Training Academy, which places graduates into local plants, and outstanding graduates have the chance to be placed into Volkswagen locations around the world.

2. **Karnataka German Technical Training Institute:** A consortium formed by the Indian Government, the Government of Karnataka, and German International Services, a German education consulting firm. Training provided is highly technical, including CNC manufacturing, industrial automation, electronics design and IT hardware. Courses are delivered to German vocational standards, with a focus on demand orientated curriculums, and often in close partnership with India – part of the Volkswagen service advisor training program is delivered through the institute.

3. **Making it easier for highly skilled foreign workers to work in Germany:** An agreement reached in 2009 allows workers to be temporarily posted in a branch of a company in Germany or India without being required to contribute to the country’s social security program. This program is specifically targeted at Indian-based companies with German branches, or German companies with Indian branches.

\textsuperscript{21} http://www.dtc.org.au/our-work/diesc/
3.2.2 Edtech-education provider consortia

A collaboration between an education technology provider and an education or training provider is an excellent way for members to reach greater potential student numbers, taking advantage of technology to expand reach and program appeal.

This model has been used with success in the corporate education field, given industry specific courses can be provided at low cost, whilst maintaining high academic standards, and delivered in multiple and dispersed locations.

Contribution to the consortium will differ by member. The education and training provider brings a typically well-regarded education brand, content or curriculum, meeting student or corporate requirements. The Edtech provider brings a well-designed online delivery solution, substantially increasing the pool of potential students for the education provider. Content can typically be easily loaded, and recent increased sophistication has resulted in improved student engagement whilst using online platforms. Further, many Edtech providers are “born global” and already have strong international connections and partnerships, and are therefore able to contribute a strong network to the consortium.

Students and program participants also benefit from the combination. They are able to access high quality borderless education, at a relatively low cost. Further, the delivery method means that they can pursue education concurrently with work or other commitments, allowing those who are unable to spare the time to pursue face-to-face study opportunities.

Summary of the model:

• Members: Edtech companies, education providers and/or industry players.
• Advantages: Edtech companies bring a greater international focus, agility, online delivery solution, plug and play platforms, and other tools for student engagement like gamification. Education providers bring tested curriculum and academic rigour.
• Typical solutions/opportunities: Corporate, industry or professional training courses delivered online.

This model has been used successfully by the following education providers:

• OES and Swinburne
• Prosper Education

3.3.3 State or territory government supported consortium:

In this model, a state or territory government takes the lead in identifying applicable partners to the consortium, supporting trust building and allowing faster reaction times to opportunities. This model is typically used when overseas governments issue requests for proposals (RFP) or where a large scale or complex opportunity across a country or region is identified.

Case Study

Online Education Services: A commercially minded Edtech provider

In 2011, Swinburne Online was formed as partnership between Swinburne University of Technology and SEEK Limited, a leading Australian and International jobs board and education business, in an example of a proactive consortia approach. The initial idea was to couple Swinburne’s academic program with SEEK’s digital expertise to pursue the opportunity that was opening up within online higher education in Australia.

The venture was later re-named to Online Education Services (OES) to enable a multi-partner approach, whilst still operating and growing Swinburne Online. OES now focusses on delivering white label online education within higher education, offering management of the development and delivery process end-to-end. This business model lends itself well to international delivery, in particular in light of SEEK’s global footprint.

Key learnings:

• The complementary nature of Swinburne’s/OES’s online education expertise and SEEK’s global digital employment capabilities presents a range of compelling international business opportunities to pursue.
• OES takes a strategic and quantitative point of view to pursuing international business, spending above average amount of time / resources on due diligence and prioritisation of identified new business opportunities. It has access to a highly-credentialed in-house strategy team at SEEK to support and accelerate this process.
• The company makes active use of M&A to support and drive its strategic priorities, and utilises the well-pedigreed M&A team / network of SEEK to identify and evaluate global M&A opportunities.
• The strategic work OES undertakes is often expensive, but the business is in a relatively unique position to draw upon SEEK’s resources, as highlighted above as well as financially, to ensure it makes robust commercial decisions.

24. Interview with representatives from Online Education Services
The government lead brings credence to the venture especially in developing economies where the ‘badge of government’ is important. This model has been used for example in India by a group of VET providers, utilising the support of the Queensland government.

“Government backing is crucial in India – it gives a tender application more credibility, and is viewed very favourably.”

Private RTO

The state or territory government may contribute funding support, initial identification of and introductions to potential consortium members (therefore supporting initial trust building), facilitate meetings, coordinate marketing, and make introductions to potential in-country networks.

The education consortium members offer sector or segment expertise, content and qualifications. A group of educators can provide a wider depth of solutions and knowledge to a high level of detail, and work best if specialised expertise does not overlap. The qualification awarded is likely to be well respected, given the government backing, and this represents an attractive proposition for international customers and students. The consortium is also likely to be delivered with industry collaboration, resulting in practical education.

“Depending on the country, the support and endorsement that can be provided by governments can carry a lot of sway in the tendering process.”

Education Lead, state government export department

Summary of the model:
- **Members:** Education and training providers from a state or territory. The state or territory government may take the lead in identifying opportunities, give business development support, bring suitable parties together and potentially provide funding.
- **Advantages:** The government support brings credence to the venture especially in developing economies where the imprimatur of government is important. The assistance in consortium formation and early support enhances the consortium’s chance of success.
- **Typical solutions/opportunities:** In response to government RFPs or geographical specific pursuits.

This model has been used successfully by the following education providers:
- Victorian Oil and Gas Consortium
- Queensland Skills and Education Consortium
- NSW Globe Scope Consortium

Case Study

Victorian Oil and Gas Consortia: Delivering targeted and industry supported skills training

A successful industry-education provider consortium is exemplified by the Victorian Oil and Gas Consortium. The consortium was formed in 2016, between five Victorian TAFEs: Box Hill Institute, Chisholm Institute, Federation Training, Melbourne Polytechnic and The Gordon, with the aim of delivering specialised training to support industry participants in the mining, oil and gas sectors.

The requirements for training were at a scale and range of expertise that would have been difficult to meet in isolation, but could be achieved using a specific capability-based focus provided by each member.

Key takeaways from the success:
1. Participants reported that a lead member was crucial, as this aided the coordination of input from the other consortium members. The Victorian government was also a key facilitator, who supported greater cooperation between the Victorian TAFEs.
2. Each consortium member had nominated a specific niche area of expertise, in line with their capabilities. This was well received by the education consultant who was managing the Australian awards program, who recognised the consortium’s ability to meet the requirements of the training both in terms of breadth and expertise.
3. Courses were delivered across Indonesia and Australia, requiring substantial in-country knowledge. Deep in-country relationships and the use of local partners meant the consortium was better received in Indonesia. It could deliver localised content in Bahasa where needed, and had an Australian contact base, supporting network development.
4. Trusted partner relationships proved important: negotiation at the formation stage required some work to agree upon an equitable contract, but this process ran smoothly given a willingness by members to ensure the final outcome was successful. These relationships have an ongoing benefit. Members have now begun to pursue new opportunities as a consortium, with high levels of trust given their experience in working together. This means they are more responsive to new opportunities and competitive to international customers.

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25. Interview with representatives from Federation Training and The Gordon, and newspaper articles
Case Study

India-EU collaboration: Developing the skills base of the Indian population

The India-EU Skills Development project funded by the European Union (EU) assists Indian skills development agencies in implementing policies aimed at skilling large numbers of Indian men and women to increase their employability and entrepreneurship. The EU is supporting the institutional capacities by helping to define standards and procedures of implementing the National Skill Qualification Framework. This includes supporting research on labour market research, and working closely with industry to develop relevant curricula, leading to improved job outcomes.

Targeted outcomes of the project:

- **Building capacity of institutions**: this component focuses on improving the education delivery received by Indian students, including staff training and development of qualification frameworks;
- **Supporting implementation of quality frameworks on a national scale**: includes assurance and assistance on accurate competency-based assessment;
- **Improving labour market analysis and information dissemination**: labour market analysis training, development of a web portal to access labour market information, supporting surveying in selected sectors.

Technical assistance on the project is provided by a consortium of EU education and training experts:

- Cambridge Education
- Mott MacDonald
- Deutsche Gesellschaft für Internationale Zusammenarbeit—Germany
- Aarhus Tech—Denmark
- Scottish Qualifications Authority—Scotland
- City and Guilds—England

Learnings from international consortia case studies

4.1 Case Study: The Association of Colleges (AOC)\textsuperscript{27}

AOC India was formed in 2013, with the aim of developing community college partnerships in India, under the facilitation of the UK India Education and Research Initiative. It was formed as a partnership of 33 further education colleges to provide UK standard vocational education to India, and was initially promoted as a key example of the strength of British vocational education. However, by 2016 only eight colleges decided to continue with the partnership, resulting in financial loss for many of the consortium’s members.

Key takeaways that can be drawn from a review of the venture are:

1. **Cultural differences were insufficiently understood:** there are significant differences in the ability and willingness of students in nations like India to pay for vocational education, which can severely constrain the ability to generate revenue from education ventures;

2. **Partners demonstrated a lack of commitment to pursue international opportunities alongside relatively successful domestic businesses:** a number of members of the venture were already generating significant revenue from their respective domestic education businesses, and were unwilling to expend the same level of time and commitment on their international ventures. This translated into insufficient relationship development, which has proved crucial in many markets for successful consortia;

3. **Diligence on the scale and attractiveness of the opportunity was insufficient.** Before undertaking an international venture, due diligence on the opportunity, including capacity to pay and a thorough competitive analysis, needs to be undertaken. Indian students typically have a relatively low capacity and willingness to pay for formal vocational education, given job outcomes are less closely tied to formal training programs compared to developed nations. Instead vocational training is often provided by employers. Such cultural differences should be fully considered in the diligence process.

"Opportunities can be identified through understanding the workforce demands of an industry, but this requires extensive research, and can be expensive."

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Education Lead, state government export department

4.2 Case Study: Saudi Colleges of Excellence\textsuperscript{28}

In 2014, UK Trade and Investment brought together a consortium to bid for contracts to establish 12 technical and vocational training colleges in Saudi Arabia, including a women’s-only college. The program was Saudi government funded, with funding dependent upon students attending 80% of classes. Initial documentation provided by the Saudi government suggested generating sufficient enrolment would be of little concern. However, anecdotal reporting indicated attendance varied significantly by campus. By late 2015, the University of Hertfordshire pulled out of the consortium, and by early 2016, Lincoln College announced that two of its in-country colleges would be closed. Canada’s Algonquin College also suffered substantial financial losses.

Key takeaways can be drawn to inform future feasibility assessments:

1. **Understanding local dynamics:** The colleges were established in rural locations, with insufficient consideration for the ability of the specific regional population to generate sufficient revenue to be viable. The Saudi Government’s projections were not validated through a more thorough independent market assessment.

2. **Cultural differences were poorly considered:** the decision to open a women’s-only college severely limited demand as female students did not enrol;

These issues were not considered in the context of the venture’s ability to generate sufficient revenue to be viable. The Saudi Government’s projections were not validated through a more thorough independent market assessment.

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\textsuperscript{27} [http://feweek.co.uk/2014/06/13/a-mid-term-review-of-the-aoc-india-project/; http://feweek.co.uk/2014/09/22/taking-indian-involvement-to-the-next-level/]

Our research found that working in a consortium is a continuum with a fluid process. The research identified seven steps which can act as a best practice guide to using a consortium model for borderless and offshore opportunities.

1. **Commit to a consortium approach:** Each potential consortium member should define its unique approach and offering to a potential consortium and how it fits with its own international strategy. Also important to the long term success of working in consortia is confirming with executive, senior management and internal stakeholders that using a consortium model is a viable approach for the organisation.

2. **Identify international opportunities and partners:** Participants will now typically use a range of channels to identify international opportunities and assess demand at an industry or regional level. Research will be undertaken to identify other organisations (education, technology or industry) who may complement your service offering and enhance competitiveness.

3. **Analyse opportunity feasibility:** Once an opportunity has been identified and loose consortium membership agreed, members need to determine if it is worthwhile pursuing. At this stage, adequate due diligence is crucial, as a number of overseas ventures have failed due to a poor understanding of opportunity drivers including student demand in the region.

4. **Respond to the opportunity:** If an opportunity is deemed feasible, the consortium will now need to respond, which could take the form of a tender application, or the development of a detailed business case for relevant supervisory boards. Completed due diligence at the feasibility stage should be collated for supervisory boards, potential revenue forecast scenarios should be understood, and if applying for a tender, a cohesive and attractive application should be submitted.

5. **Formalise the consortium structure:** To deliver to an opportunity the consortium structure needs to be formalised. This will involve determining responsibility for key tasks across members, definition of an operating model, legal model definition, and construction of a consortium contract.

6. **Deliver to the opportunity:** When formalisation has occurred, the operating model should be implemented and delivery of the consortium solution should commence. This step also includes the development and implementation of an extensive quality assurance model and regular communication between consortium members. Delivery needs to remain of high quality ensuring all consortium members meet commitments and customer needs are met on budget.

7. **Review outcomes and adjust approach as necessary:** At the end of the project, the consortium working group should come together, and analyse performance against agreed upon KPIs. Lessons learned can be identified with reference to these indicators, and this process allows each member to improve upon their performance, and ultimately make an informed decision on whether to continue on as a member of the consortium.

For further details on the consortium lifecycle refer to the toolkit accompanying this report.

Specifically, our research found four critical areas of best practice which align closely with this seven-stage consortium process.

1. Opportunity identification
2. Feasibility assessment
3. Forming consortia
4. Project delivery
1. Lead provider model
- The consortium does not have a legal identity.
- A lead organisation is chosen and it owns the ultimate contract. It also has responsibility for the risks associated with the contract.
- The partners are sub-contractors to the project and deliver services via the managing provider.

2. Managing agent model
- An external agent is chosen to manage the contract, it doesn't deliver any services.
- The agent charges a management fee and is generally chosen for its expertise in contract management. It may understand the nature of work delivered.
- Services are provided by the consortium members which act as sub-contractors.

3. Hub and spoke model
- A new legal entity is set up for the consortium. Consortium members become owners of the new legal entity.
- The new entity will take on the risks.
- Service delivery can be outsourced to members and external companies.
5.1 Opportunity identification

Identification of suitable international opportunities should encompass a range of methods and sources, with a particular emphasis on opportunity identification leveraging in-country relationships and insights. This assists in quickly validating the quality of an opportunity and any specific local requirements or nuances. Respondents who utilised in-country relationships, particularly from industry sources, typically reported better success in international education delivery.

“We found using government agencies like Austrade to be a good way of identifying opportunities, especially when we showed interest. The government name carries a lot of weight in some countries, and this was important.”

Private RTO

A consortium should also undertake an initial opportunity qualification using desk research, Austrade and state government offices, or consultants to identify early on if an opportunity is worth pursuing. More formal due diligence is relatively expensive, and the process should not be undertaken unnecessarily.

Best practice at this stage of the consortium process includes:

- Use of a range of channels to understand the market and identify opportunities including:
  - Trade missions and market visits;
  - In-country agents, consultants and business networks;
  - Relationship development with industry operators and peak bodies in-country;
  - Austrade and state or territory trade promotion bodies;
  - Australian companies located in international markets; and
  - Market research and intelligence including Austrade’s MIP.

- Form a ‘consortium pursuit group’ from members of the consortium and any government supported resources to identify and respond to opportunities.

- Focus on each consortium member’s unique capability and service offering.

“Different countries require different approaches to pursuing opportunities, e.g. markets with high levels of government control/interest are best explored using government channels, while industry focussed opportunities led by the private sector benefit from in-country relationship development.”

Private RTO

5.2 Feasibility Assessment

It is important to ensure the opportunity is fully understood by those pursuing it and an effective feasibility assessment should not be undertaken superficially. Whilst this may be expensive in the short run, the costs of consortia failure due to insufficient due diligence at the feasibility stage has proven considerably more expensive for those international case studies reviewed as part of this study.

“Opportunities can be identified through understanding the workforce demands of an industry, but this requires extensive research, and can be expensive.”

Education Lead, state government export department

Best practices at this stage of the consortium process:

- A dedicated team with experience in opportunity analysis should be assigned the task of undertaking due diligence of the opportunity. If capability does not exist in-house, hiring the services of an external consultant may be considered as an option;

- Diligence needs to extend to the potential partners, who will join the consortium as members. A lack of due diligence on partners is a key failing identified by interview respondents.
• The due diligence process should consider the commitment level of partners to the project, as partners pulling out from the consortium late in the formation process can generate significant expense for other consortium members or even result in the failure of meeting contractual agreements with the end customer;
• Due diligence should be commercial in nature: particular focus should be on capital required, the return profile of the project, and the risk profile of the project;
• The risk profile must be wide ranging: it should consider risks including the potential for student demand to fall short of expectations, government support domestically and in-country to be withdrawn, political circumstances to change in the delivery country, and the potential for the consortium agreement to be reneged upon. All risks need to be considered in the context of the effect they have on the probability of potential return outcomes.

“Quantitative analysis of opportunity and due diligence on partners and customers are key to making an informed decision about progressing with an opportunity.”

Edtech player

5.3 Forming Consortia

The formation of a strong consortium is contingent upon the development of a model that suits all parties and is considered equitable by all members.

“Whilst the negotiation step took some time, it was worthwhile, because we now have a good level of trust amongst all members of the consortium, and each member is satisfied with issues around revenue and cost sharing.”

TAFE – member of an industry focused consortium

Successful consortia respondents indicate that this stage often takes extensive negotiation, but is integral to a long-lasting and fruitful consortium relationship. Nearly 70% of interviewees indicated that negotiation of contractual terms was a key challenge to overcome for a successful consortium.

Best practices at this stage of the consortium lifecycle:
• Form a ‘consortium working group’ i.e. selected resources from each member of the consortium who will have delivery responsibility, form a ‘consortium steering committee’ with senior executives from the consortium who will have decision making power for dispute escalations;
• Ensure capital contribution is stipulated in an equitable manner;
• Ensure revenue receipt is stipulated in an equitable manner, with reference to capital and labour contributions;
• Ensure responsibility for delivery and auxiliary support (student management, recruitment etc.) is stipulated;
• Define and negotiate the consortium contract or memorandum of understanding or partnership agreement;
• Define terms and conditions for exit of a consortium member (voluntary or otherwise); and
• Ensure guidelines are stipulated for consortium exit, including in the case of a member exiting the education sector through ceasing business, referencing methodology on how to mitigate any reputational damage.

“Offshore partners who are well integrated into the target market are crucial to ensure a consortium project goes well.”

Private RTO - experienced in consortium model

29. Based interviews conducted by EY with industry participants for this report
5.4 Delivery

Delivery is a crucial part of international education, and a key point of failure for a number of consortia.

“Delivery should be reviewed on a regular basis with consortium members, and input sought on an ongoing basis, to ensure it remains aligned with quality expectations and in-line with what each consortium member expects of the venture.”

RTO - experienced in consortium model

Best practices at this stage of the consortium process:

- Delivery must be relevant to the region, and to the education level of students;
- Develop a quality assurance model and implement to monitor quality of delivery;
- The consortium working group should conduct regular reviews of the project delivery and outcomes including student outcomes, customer satisfaction, financial metrics, consortium members’ satisfaction and performance;
- Ongoing liaison must be maintained with the relevant local government departments (if relevant), to ensure delivery remains in line with expectations.

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Case Study

Queensland Skills and Education Consortium (QSEC)³⁰

QSEC is comprised of a group of Queensland-based training providers: The Australian Retail College, TAFE Queensland, The Food Coach Institute and InTech Institute of Technology. It was formed to deliver a wide range of high quality programs with an aim of positive contribution to the lives of Indian job seekers. The consortium is a leading example of international education delivery success in what is often a difficult delivery market. There are a number of reasons for the consortium’s success so far:

1. The lead consortium member has deep experience in India, and had already developed an extensive network prior to the formation of the consortium. The lead member is heavily involved in opportunity identification, member selection, and coordination of member contribution.

2. There is a close relationship with Trade and Investment Queensland, which has a dedicated Education Officer in India as part of its team. Government support is important in India, given high levels of government involvement in education and training. QSEC were successful in early 2017 in applying for a co-contribution Grant under the International Education Partnership Fund, to grow Queensland off-shore education offerings.

3. The consortium is highly selective in its opportunity pursuit. It carefully screens opportunities before contributing funds to pursue them, and will respond only to demand driven networks of the opportunity that the leadership team is comfortable with. This limits outlay on opportunity pursuit for opportunities that may not pass the due diligence stage.

4. Buy-in from each member is crucial. Given the consortium targets opportunities selectively, flexibility is important in order to meet often varied projects. This can mean modified charge-out rates and selecting members specifically for an opportunity or customer. Members must be flexible on these variables, and this is reflective of buy-in to the consortium as a whole.

5. The consortium has funded an in-country representative in India to provide on the ground knowledge, relationship development and opportunity identification. This has strengthened the consortium’s brand in India with both government and industry as it demonstrates a strong commitment to the market, and is a point of difference to other foreign training providers.

The QSEC consortia is successful due to its strong networks in India and understanding of the market, active government support from a highly skilled team and because each member is supportive of the group as a whole. These characteristics have allowed it to perform well in a market that has seen a number of failures in on-shore delivery of international training and skills development.

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³⁰ Interviews with representatives from QSEC and media articles
6 Offshore opportunities

Based on the feedback of industry during the interview process, we created an inventory of potential international consortium opportunities for Australian companies in education and training.

“In China, demand is increasingly strong for English language training at an early age.”

Consistently, the most attractive opportunities were identified across Asia and Latin America. However, within these geographies, substantial differences exist in available opportunities.

- India has an increasing skills gap, higher education is valued most, and many students prefer the pursuit of higher education in preference to vocational training.
- In China, the government has embarked on a plan to generate a workforce with strong vocational skills, and therefore demand for skills training in sectors, including healthcare, is strong.
- Opportunities exist across much of South-East Asia to support a global workforce, and skills training in sectors, including hospitality and healthcare, is of interest to providers.
- In Latin America, providers indicate opportunities for partnership formation with industry to be of interest, allowing industry access to a specifically skilled workforce, and graduates access to a highly probable positive job outcome upon course completion.
- The Edtech sector saw emerging opportunities in China, and cited markets including the US and UK as current priorities.

Chart 5 and Table 1 provide a guide to the wide range of offshore consortia opportunities identified through the interview process across key international markets.
Based on more than 50 interviews with industry and government representatives:

### Latin America

**Typical Opportunity:**
- Skills for industry
- English language training

**Pop 15-29:** ~85m

**2025 students:** ~60k

**Prospects:** Med

"Opportunities for industry training partnerships with Australian companies"

### Developed world

**Typical Opportunity:**
- Ongoing corporate development

**Pop 15-29:** ~70m

**2025 students:** ~65k

**Prospects:** Low-med

"Higher margin opportunities in corporate development, but a competitive market"
India

Typical Opportunity:
- Skills for industry
- Global workforce development
- Train the trainer

Pop 15-29: 138m
2025 students: 112k
Prospects: High

“Government backing crucial; scale opportunities exist”

Philippines

Typical Opportunity:
- Global workforce development
- Skills for industry
- English language training

Pop 15-29: 7m
2025 students: 27k
Prospects: Med-High

“Key market for global workforce training”

Malaysia

Typical Opportunity:
- Skills for industry
- English language training

Pop 15-29: 7m
2025 students: 36k
Prospects: Med-High

“Key market for global workforce training”

Sri Lanka

Typical Opportunity:
- Skills for industry

Pop 15-29: 15m
2025 students: 30k
Prospects: Med

“Significant skills gap in industry”

China

Typical Opportunity:
- Train the trainer
- Curriculum licencing
- English language training

Pop 15-29: 157m
2025 students: 233k
Prospects: High

“Highly competitive, but opps. in trainer the trainer”

Indonesia

Typical Opportunity:
- Global workforce development
- Skills for industry
- English language training

Pop 15-29: 7m
2025 students: 27k
Prospects: Med-High

“Key market for global workforce training”

<table>
<thead>
<tr>
<th>Country</th>
<th>Sub-sectors of interest</th>
<th>Applicable business models</th>
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| India       | • Skills training with industry connections  
• Global workforce development  
• Train the trainer | • Industry-education provider collaboration  
• State/territory government supported consortia |
| China       | • Train the trainer  
• Curriculum licencing  
• Early English language training | • State/territory government supported consortia  
• Edtech-education provider consortia |
| Latin America | • Skills training with industry connections  
• English language training | • Industry-education provider collaboration |
| Malaysia    | • Skills with industry connections | • State/territory government supported consortia |
| Sri Lanka   | • Skills training with industry connections | • Industry-education provider collaboration  
• State/territory government supported consortia |
| Indonesia   | • Skills training with industry connections  
• Global workforce development  
• English language training | • Industry-education provider collaboration  
• State/territory government supported consortia |
| Vietnam     | • Skills training with industry connections  
• Global workforce development  
• English language training | • Industry-education provider collaboration  
• State/territory government supported consortia |
| Philippines | • Skills training with industry connections, including meeting practical training requirements  
• Global workforce development  
• English language training | • Industry-education provider collaboration  
• State/territory government supported consortia |
| Developed countries e.g. UK, US | • Ongoing corporate education, either industry driven, or as a means of staying employable or focused on professional education  
• Technology driven education and training solutions, including eLearning, virtual reality and gamification | • Industry-education provider collaboration  
• Edtech-education provider consortia |

Table 1: Potential opportunities, and possible consortia business models applicable

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32. Based interviews conducted by EY with industry participants for this report

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30 EY | Consortia opportunities and pathways for Australian SMEs delivering education and training services
China: while it offers large opportunities by virtue of its size, there are challenges

Despite a large student population in China, ‘the size of the pie’ for Australian vocational education and training curriculum may potentially be limited. Interview respondents indicated that whilst there is a high number of prospective students in China, regulations relating to vocational qualifications for high-growth industries – including health care and aged care – are underdeveloped.

Employers do not see the completion of an extensive VET course as a sufficient differentiator between job applicants. This has a knock-on effect in terms of student demand for training programs in sectors Australia is well recognised for. For example in the aged care sector, the government is unlikely to legislate in the short-term that formal training qualifications are needed for workers in aged care centres, therefore students are highly unlikely to undertake these courses.

Additionally, program delivery should be considered with reference to higher education pathways. Many students pursue education with a view towards entry into the higher education system, and therefore programs that do not offer this pathway are less enticing to students. A focus on programs that offer substantial opportunities for graduates to pursue higher education will stimulate student demand.

Given these constraints, opportunities in delivering education in China may need to be reconsidered. Interview respondents indicated the following opportunities are more likely to generate student demand:

1. **Teacher training.** Training educators on how to deliver programs within the context of the AQF improves vocational education in China, and ultimately allows the institution to which training is being provided to determine how best to deliver the courses to their students. The Chinese institution then is responsible for generating local student demand.

2. **Curriculum licensing.** This method allows VET providers to export the well-regarded VET curriculum delivered in Australia, adjusted to suit Chinese requirements. This relieves Australian providers of the need to generate student demand to ensure the program’s viability.

India: skills needs recognised, but skills training programs rollout difficult

In 2015, Indian Prime Minister Narendra Modi announced the Skill India Program, targeted at training 400 million people in India in vocational skills by 2022 to address India’s drastic shortage of skilled workers. While 68% of the British workforce and 75% of the German workforce had undergone formal skills training, only 2.3% of the Indian workforce had completed any training. This has resulted in a large proportion of the workforce being considerably less productive and skilled compared to western nations, severely limiting prospects for economic growth.

Incentivising to complete skills training was extensive: the government provided financial rewards to candidates who complete approved skill training programs, loans were given to training providers, and a national SMS campaign was rolled out.

To support the ambitious plan, partnerships were formed with international education experts, including the UK, Japan, and the United States. Eleven British companies have committed to the program, forming the basis for the establishment of Centres of Excellence across key sectors including automotive and advanced engineering, healthcare, information and communication technology, and clean-tech energy.

However, by June 2017 the government had distanced itself from the training targets, citing an unwillingness to chase a specific number and indicating a strategic shift towards demand driven skills training instead of supply driven.

This is likely indicative of insufficient quality control placed on education providers, leading to inefficient allocation of funds. Nevertheless, the Indian government remains committed to addressing the skills gap and training opportunities do exist. Key considerations for success include:

- Providers must firstly consider their reputation as a provider in the eyes of the government.
- Similar to China, providers need to consider the implications of teaching to the Australian Qualifications Framework (AQF); employers are predominately interested in competency over qualifications, and students are interested predominately in job outcomes.
- If qualifications do not command a premium wage – as indicated in this research process – the additional cost of delivering to the AQF is unlikely to generate a worthwhile return.

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33. Based on interviews with industry participants with experience in China
34. Based on interviews with industry participants with experience in India

Consortia opportunities and pathways for Australian SMEs delivering education and training services | EY
Offshore and borderless education opportunities for Australian SMEs in the education and training sector are immense. If Australia is able to obtain just a 10% market share of the estimated global demand by 2025, this will reach 110 million learners by 2025.

Competing at scale is therefore one of the game changers that will allow Australian education and training organisations to realise potential and achieve this target. The appropriate use of a consortium model is an important mechanism to allow providers to compete at this scale. The use of consortia models by Australian education and training organisations is growing, generally supported by state and territory governments. Growth in education technology companies will also provide complementary technology for education providers to leverage and provide solutions of the future for international learners.

In order to capitalise on Australia’s education capabilities, industry expertise and a growing Edtech base, a consortium model will need to be increasingly used. Interviews with leading education and training market participants have indicated a strong appetite to use consortia to develop solutions for offshore and borderless opportunities.

The Australian education and training SMEs can use the toolkit developed as part of this exercise (and supplied separately) to decide whether consortium model fits with their international strategy, identify opportunities using consortia models, and develop and implement world-class consortia solutions for these opportunities.

Beyond this report, there are opportunities to further support the education and training industry with consortium formation by developing new industry tools, including:

- **Database of Australian capabilities:** Conducting a stocktake of the supply side capabilities of the education and training industry to allow Austrade and/or state and territory governments to connect potential consortium partners with suitable opportunities;
- **Opportunities dissemination:** Develop a platform to systematically disseminate consortium opportunities to the Australian industry; and
- **Communicate success:** Share best practices and case studies through seminars, workshops and media to encourage greater consortium usage and learnings.

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## Appendix 1: Interviewees

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Appendix 2: How can Austrade help?

The contents included in this section were provided by Austrade

About Austrade
The Australian Trade and Investment Commission - Austrade - contributes to Australia’s economic prosperity by helping Australian businesses, education institutions, tourism operators, governments and citizens as they:

- develop international markets
- win productive foreign direct investment
- promote international education
- strengthen Australia’s tourism industry
- seek consular and passport services.

Austrade helps companies around the world to identify and take up investment opportunities in Australia as well as to source Australian goods and services.

Our assistance includes:

- providing insight on Australian capabilities
- identifying potential investment projects and strategic alliance partners
- helping you to identify and contact Australian suppliers.

austrade.gov.au

AIE2025 - Australian International Education 2025
AIE 2025 is a long term market development roadmap for the Australian international education sector. It is a co-creation between Australia’s international education sector and Austrade to complement the National Strategy for International Education. Our aspiration is to deliver high quality education and skills to meet the needs of the world’s one billion learners in 2025.

The roadmap seeks to catalyse readiness for change and increase agility within the sector. It aims to drive fresh thinking and action in the identification and pursuit of opportunities for sustainable growth both onshore and in borderless education that match the sector’s strengths with trends in global demand. Austrade is working with the sector to identify new and emerging opportunities to support the sector’s sustainable growth and to enable the sector to meet the aspiration of AIE2025. Access the roadmap here www.austrade.gov.au/Australian/Education/Services/australian-international-education-2025/AIE2025-roadmap

Market Information Package
Austrade uses its global network to identify opportunities and market intelligence to help Australian education and training providers expand their services internationally. Market intelligence, analysis and opportunities are delivered through Austrade’s online subscriber service the Market Information Package (MIP). The flagship product of the MIP - MIP Orbis - allows you to discover actionable market insights through interactive visualisations of international education data, access to source data, and the ability to create, save and share interactive charts.

The MIP also includes:

- A weekly newsletter that highlights new content, data, events and other relevant government updates
- Market insights by country, region and sector
- Market opportunities
- Market data and trend analysis, updates and reports

For more information about the MIP and how to subscribe visit austrade.gov.au/mip

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Consortia opportunities and pathways for Australian SMEs delivering education and training services | EY
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