

ifa ECP Monitor Country Report

Australia

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1. External cultural policy objectives in geopolitical context

A middle power globally and a major political player in the Southern Hemisphere, Australia enjoys a very positive reputation in the world. The 2020 Anholt-Ipsos Nation Brands Index (NBI) marked a record high (8th out of 50) position for the nation “Down Under” (Ipsos, 2020). A member of G20, OECD, UN, the Commonwealth, ASEAN and other international groups, Australia is among top 20 countries in many measures, other than population where it comes in at 55th (see Table 1).

As a small nation occupying a vast, resource-rich continent secluded from the rest of the globalised world, and a satellite of former British Empire, Australia’s gaze has always been oriented outwards. The primary mode of external action, however, has predominantly been ‘economic diplomacy’. Compared to other countries like the UK or France, external cultural policy in Australia seems to be at a lower rung on the ladder of government priorities. In 2009, the Lowy Institute published a sobering report on the state of Australia’s limited diplomatic capacities which were a long way from its global aspirations (Lowy Institute, 2009). The overseas diplomatic missions are overstretched and fewer than those of many other countries. With 118 posts abroad, Australia is trailing the OECD average of 132 and way behind the G20 average of 194 (Conley Tyler, 2019b; Lowy Institute, n.d.). Ten years after Lowy reports¹ there are still not enough resources for diplomacy, with funding for the Department for the Foreign Affairs and Trade (DFAT) now at the low 1.3 per cent of the federal budget (ibid.).

In the 2017 Foreign Policy White Paper, then-Foreign Minister Julie Bishop urged a renewed interest in Australia’s diplomacy with the stated aim “to ensure Australia remains a persuasive force in our region” (qtd. in Wiseman, 2018). DFAT had to put the soft-power strategy on hold amid the global Covid-19 pandemic, but it does not mean that these plans were completely abandoned. The 2019 edition of *Soft Power 30* recognises Australia’s strong position, placing it in the top ten. Nevertheless, this represents a slight decline from 2016, when it ranked sixth (Portland, 2019).

Australia seeks to shake off its ‘middle power’ status (Bishop, 2015) and it has the potential to do so. The continent-nation has a lot to be proud of. Aboriginal Australian culture is one of the oldest continuous cultures, established 60,000 years ago. Apart from ancient human tradition, the country enjoys spectacular natural treasures including the Great Barrier Reef and the Australian Antarctic Territory. Internationally, Australia remains a very sought-after tourist destination, which contributes to the country’s development and competitiveness as shown in the 2019 Travel & Tourism Index (7th out of 140 economies) (WEF, 2019). With a high standard of living, democratic governance, and rich multicultural social fabric, Australian cities consistently appear on the top ten list of most liveable cities in the world. Apart from tourists and expats, Australia attracts global talent. On a per-capita basis, it stands out as the country with the highest concentration of international students in the developed world (Babones, 2019). Moreover, the government lays out a significant portion of its funds on education (Table 2). In fact, education, especially at the tertiary level, stands out as perhaps the strongest ECP asset.

¹ *Diplomatic Deficit 2009, Diplomatic Disrepair 2011.*

Table 1: Country's geopolitical and geoeconomic position

	2019	% change since 2015		
Population (millions) / ranking	25.36 / 55 th	6.51		
GDP ranking	1,392,681 / 14 th	4		
GDP per capita	53,079	12.18		
Cultural economy (%GDP)	0.94 ⁽²⁰¹⁸⁾	-0.42		
Education economy (%GDP)	5.85 ⁽²⁰¹⁸⁾	0.05		
R&D economy (%GDP)	1.79 ⁽²⁰¹⁷⁾	-0.08		
Media economy (%GDP)	1,392,681 / 14 th	4		
OECD, World Bank				
	2019	2015		
Geopolitical position	Hard power rank	19 ⁽²⁰²¹⁾	13	↓
	World trade rank	21	20	↓
	Soft power rank	9	6	↓
	Diplomacy rank	27	27 ⁽²⁰¹⁶⁾	-

Table 2: Government spending on ECP fields as a % of total outlays

	2019	% change since 2015
Culture	-	-
Education	13.61 ⁽²⁰¹⁷⁾	-0.47
Research & Development	-	-
Media	-	0

Source: UIS, World Bank

2. External cultural policy: an overview

Table 3: Government spending on ECP fields as a % of total outlays

	2019
Number of countries with ECP activities	~ 84 ²
Total number of institutions abroad	9 bilateral organisations, 11 international ABC bureaus
Total number of FTE staff engaged in ECP activities	DFAT: 3,702
Government financial support (A\$) / DFAT	Program 1.1: Foreign Affairs and Trade Operations: 830,346,000 Program 1.5 New Colombo Plan: 50,933,000 Program 1.6 Public Information Services and Public Diplomacy: 11,304,000 Program 1.7 Promote Australia's International Tourism Interests: 154,118,000 Total spending for diplomacy & aid: 6.7 billion ⁽²⁰¹⁹⁻²⁰⁾
Total expenditure of all ECP operators (\$ million)	-
Comparative ECP ranking	<i>major</i>

Australia is a relatively young nation, formed in 1901 with the federation of six British colonies into the Commonwealth of Australia. Due to colonial history, the country shares some common features of other anglophone countries but today is a unique multicultural society. Owing to different historical circumstances, Australia has experienced many waves of multi-ethnic immigration. A significant portion of residents is born overseas: 7.6 million or nearly 30% of the population (ABS, 2021). Aside from the indigenous heritage of the Australian Aboriginal and Torres Strait Islander peoples, it is therefore difficult for Australia to promote an “Australian” culture and develop a clear external cultural policy, or at least not in the way that the British, French, Chinese, or other nations can (Carter, 2015).

Creative Nation (1994) the first ‘proper’ national cultural policy marked a shift in how the nation perceived itself and wanted to communicate its image to the world (‘International Projection of Australian Culture’). The first real acknowledgment of Australia’s multicultural social fabric happened during the Whitlam government in the mid-1970s which abolished the White Australia³ policy for good. The status of marginalised Aboriginal Australians also entered public debates. *Creative Nation* recorded all these changes. The document describes Australian culture as “now an exotic hybrid” with references to the significance of indigenous and immigrant cultures in creating the Australian identity (Hawkings, 2014). Likewise, the 2013 follow-up document, *Creative Australia*, celebrates Australia’s “strong, diverse, and

² DFAT has 120 posts in 84 countries. DFAT (2020).

³ The White Australia policy refers to a set of restrictive and racial policies that aimed to forbid people of non-European ethnic origin from immigrating to Australia.

inclusive culture” (Australian Government, 2013, p. 6). One of the goals in the ten-year vision is cultural exchange and diplomacy which should showcase Australia to the rest of the world as “a sophisticated, creative, innovative nation” (Australian Government, 2013, p. 112).

The Department of Foreign Affairs and Trade (DFAT) is the most prominent body in charge of external cultural policy. In the latest available Public Diplomacy Strategy 2014-2016, DFAT pledged to focus on ‘public diplomacy’ initiatives which showcase Australia’s credentials as “a destination for innovation, business, investment, tourism and study,” and to strengthen engagement with the Indo-Pacific, a region that significantly impacts Australia’s economic growth (Australian Government, 2016). In 2012, the government released a roadmap until 2025 (the Asian Century White Paper) for Australia to become a more prosperous and resilient nation, and share the new opportunities in the Asian space (Australian Government, 2012). DFAT therefore seeks to promote a positive national image overseas which would advance foreign and trade policy (Wyszomirski, Burgess, & Peila, 2003). Despite strong emphasis on financial aspects, DFAT itself is chronically underfunded. The combined budget for diplomacy and aid has shrunk from A\$8.3 billion in 2013-14 to A\$6.7 billion for 2019-20 financial year (Conley Tyler, 2019b).

The 2017 Foreign Policy White Paper places Australia’s economic and commercial diplomacy at the forefront of the country’s international engagement (Australian Government, 2017). Both national cultural policies, *Creative Nation* (1994) and *Creative Australia* (2013), are indisputably also economic policies. Under the motto “Culture creates wealth” they entrenched the relationship between the arts and the economy. Indeed, although the UK is now considered the absolute leader in the field, the concept of creative industries was first documented in *Creative Nation*, when the Australian government recognised the immense potential of digital and global culture (Moore, 2014). The economic benefits are clear: in 2016-17 the financial contribution to the GDP from cultural activities was A\$111.7 billion, or 6.4% of GDP (Department of Communications and the Arts, 2018).

Authors Wyszomirski et al. (2003, p. 10) notice that if a country’s Foreign Ministry also oversees trade (like DFAT), it is very likely that ECP programs will employ culture to promote trade and exports. DFAT has a dedicated department: the Australia Trade Commission, or Austrade, which also promotes cultural industry exports. Creativity is also a vital part of the national brand, cultivated by the Austrade’s agency, Australia Unlimited. Tourism Australia is responsible for promoting the nation as an internationally competitive travel destination.⁴ Other examples of export promotion include educational services (Australian Trade Commission and the university sector), audio-visual production (Screen Australia), sports (Australian Sports Commission), and hosting major diplomatic events (e.g. 2014 G20 Brisbane summit) (Ang, Isar, & Mar, 2015).

Broadly speaking, three tiers of government are involved: federal, state and territory, and local. DFAT coordinates the federal government’s ECP efforts. Australian cultural policy is rather handled at a sub-state level, under the helm of respective federal states’ bodies: Create NSW, Arts QLD, Creative Victoria, Arts Tasmania, Arts NT, Arts ACT, Arts SA (Alasuutari & Kangas, 2020).⁵

⁴ DFAT supported Australia’s international tourism interests with A\$154,118,000 in 2019-20 (DFAT, 2020b).

⁵ Australia is a federation of six states (New South Wales, Queensland, South Australia, Tasmania, Victoria, and Western Australia), three internal territories (the Australian Capital Territory, the Jervis Bay Territory, and the Northern Territory), and seven external territories (Ashmore and Cartier Islands, the Australian Antarctic Territory,

There is no single budget line for international cultural relations. The ECP financing is dispersed across various government programs and departments. On DFAT's part, the ECP engagement mainly takes place through the bilateral foundations, councils, and institutes, and the Australian Cultural Diplomacy Grants Program (ACDGP) which are supported annually with A\$6.75 million. The ACDGP program focuses on four priority regions: Asia, South Pacific, Americas and Western Europe, and the Middle East and Africa. Besides DFAT's programs, the Department of Communications and the Arts supports international culture activities with over A\$12.6 million, including the International Cultural Diplomacy Arts Fund worth A\$2.9 million (UNESCO, 2018).

The Department of Infrastructure, Transport, Regional Development and Communications (DITRDC) aids DFAT in achieving the external strategy goals. The preceding Department of Communications and Arts (DOCA) was abolished in 2020 and merged into a new super department. Some critics say that the absence of the word 'Arts' from the new department's title is revealing, especially since the government has been incrementally reducing its support for the arts (Rigby, 2019). The national cultural agency, Australia Council, is an arm's length organisation under DITRDC (discussed in the next section). In addition, DITRDC administers various grants, including the International Cultural Diplomacy Arts Fund which supports activities that advance Australia's interests and reputation abroad and promote international people-to-people exchanges. In the 2019-20 round, 6 cultural diplomacy projects were supported with A\$ 528,137 (Australian Government, 2020a).

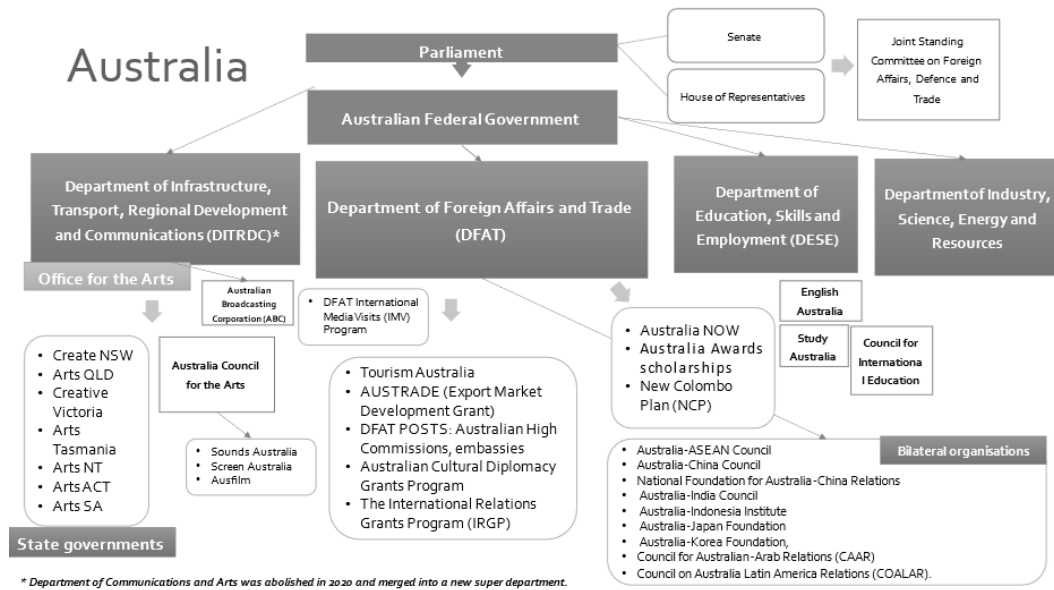
The Australian government promotes cultural and people-to-people exchanges through different bilateral organisations: Australia-ASEAN Council (est. 2015), Australia-China Council (1978), National Foundation for Australia-China Relations (2020), Australia-India Council (1992), Australia-Indonesia Institute (1989), Australia-Japan Foundation (1976), Australia-Korea Foundation (1992). The former Australia-Malaysia and Australia-Thailand institutes were merged into the ASEAN Council which engages with all countries across South-East Asia. The Advisory Group on Australia-Africa Relations (2015) is tasked with Australia's engagement in Sub-Saharan Africa. In order to strengthen ties with Arab and Latin American countries, two additional bodies were created – Council for Australian-Arab Relations (2003), Council on Australia Latin America Relations (2001). Funding for these bodies and the Australian Cultural Diplomacy Grants Program is provided through the DFAT's International Relations Grants Program (IRPG) (up to A\$ 40,000 per grant) (Australian Government, 2021). Based on bilateral cooperation other initiatives have been undertaken in recent years including the Australia Singapore Arts Group (est. 2016).

In terms of geographic focus, ECP efforts are mostly directed towards Western Europe, North America, North and Southeast Asia (Wyszomirski et al., 2003). For a long time, Australia aligned its cultural priorities with Europe. Carroll and Gantner highlighted Australia's historically "derivative culture" which consisted of "largely Western derived practices" (2012, p. 4). A major shift happened in 1991 when the Australia Council for the Arts allocated half of its international funding to Asian programs. Despite the priorities set out in the Asian Century paper (Australian Government, 2012), Asia is still not the primary target of intercultural programs, and more attention is given to Western countries like the UK, Germany, France, US, and Canada (Mitchell & Teychenne, 2018, p. 327). At the same time, Australian diplomacy has a very strong regional focus since it is in the country's interest to

Christmas Island, the Cocos (Keeling) Islands, the Coral Sea Islands, Heard Island and McDonald Islands, and Norfolk Island).

establish closer geopolitical links with its neighbours (Ang et al., 2015). This is not always evident from the government's financial commitment to ECP. In 2018/19 only between A\$400,000 and 500,000 was made available for the Australian Cultural Diplomacy Grants Program in the Pacific, a trivial amount compared to the A\$206.6 million regional aid budget (Carey, 2018, p. 4).

Figure 1: Institutional map of country's ECP



3. ECP fields

3.1. Culture and the arts

Table 4: Key statistics on culture and the arts

	2019	2015
Number of countries present	57 ⁶	
Number of institutes	9 bilateral organisations ⁷	-
Number of FTE staff	Australia Council: 101	-
Number of cultural agreements	over 40	-
Budget (A\$)	Screen Australia: 91.52 million Australia Council (international activity): 1.4 million	Screen Australia: 113.77 million

⁶ Countries where Australia Council supported arts activities.

⁷ Australia-China Council, Australia-ASEAN Council, Australia-India Council, Australia-Indonesia Council, Australia-Indonesia Council, Australia-Japan Foundation, Australia-Korea Foundation, Council for Australian-Arab Relations, Council on Australia Latin America Relations.

Government financial support (A\$)	Support for Screen Australia: 81.79 million Support for Ausfilm: 3.4 million Int. film productions - Location Incentive: 30.4 million International Cultural Diplomacy Arts Fund: 774,400 provided to support 10 projects (2018-19) Indigenous Repatriation Museum Grants Program: 659,000 (2018)	Support for Screen Australia: 84.40 million
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One area where Australia has not taken clear and conspicuous measures to improve its international standing is cultural diplomacy. There is no central promotional institution similar to the British Council or Goethe Institut. The now-defunct Australian International Cultural Council (AICC), was a public-private advisory group under DFAT, formed in 1998 and tasked with two missions: project a favourable national image and use that reputation to advance foreign and trade policy interests (Wyszomirski et al., 2003). The Council was abolished in 2014 in a government move to decrease expenditures.

The Australia Council for the Arts is the chief cultural funding body, originally modelled on the Arts Council of Great Britain and inspired by the Canada Council (Johanson & Rentschler, 2002). With its establishment in 1975 was laid the foundation of Australian cultural policy. The Council was imagined as an “arm’s length” organisation, rather than a ministry for culture, over concerns of political interference and bias (Madden, 2011). At least A\$11 million of the Australia Council’s budget was spent in grants for international initiatives in 2015 (Australia Council, 2015).

Screen Australia is the public funding body for the Australian cinema and television industry and a promotional agency that represents Australian acts at major events and markets. An especially important initiative is the Australia’s Co-production Program, implemented by Screen Australia and overseen by the Department of Communications and the Arts. Currently, Australia has treaties with Canada, China, Germany, Korea, Ireland, Israel, Italy, Singapore, South Africa, the UK, France, and New Zealand. Since the program’s inception in 1986, 188 official co-productions have been completed (Screen Australia, 2019). In addition, the government is supporting Ausfilm⁸ in its role to attract international production to Australia, and so generate foreign investment and upskill the domestic screen industry. A\$3.4 million was provided for this purpose in 2019-20 (DITRDC, 2020). Australian audiovisual creators also help promote the country and bring attention to Australia as a tourism destination. Internationally famous Australians like actor Chris Hemsworth have been used in tourism advertising. In 2015, it was estimated that screen production attracts around 230,000 international tourists to Australia each year and contributes to around A\$725 million in tourism expenditure (Screen Australia, 2016).

Music exports have been another powerful tool of cultural diplomacy. Although not yet established as other giants in the industry like the UK or US, Australian musicians have created

⁸ Ausfilm has one office in Los Angeles, USA, the global hub for television and film productions.

some of the most memorable tunes of all time: from Aussie rock bands like AC/DC, INXS, Nick Cave and The Bad Seeds, to pop/ indie artists like Kylie Minogue, Sia, Tame Impala, and many more. The government might not have had a hand in determining an individual's success, but the link between music exports and 'soft power' ambitions is nevertheless there. Sounds Australia, Australia's music export office, was created in 2009 as a joint initiative of the Australia Council and APRA AMCOS,⁹ and receives additional support from the government. The agency aims to raise the profile of Australian contemporary music in key international markets by showcasing the artists at international events. To achieve this, A\$1.16 million of government funding was made available from 2016-17 to 2019-20 (UNESCO, 2018). Another goal is to demonstrate the diversity of Australian creative expression and promote the country's creative excellence internationally. In its ten-year existence, Sounds Australia has promoted over 1,404 Australian acts (Australia Council, 2019).

Although the indigenous arts serve as symbols of Australian national identity, they are still not as included in the ECP activities as they might be. The Australia Council supports the local indigenous artists to enter national and international markets and is a partner in the tri-state First Nations exchange with Canada and New Zealand. To help promote reconciliation, the Australian government oversees the return of ancestral remains of Aboriginal and Torres Strait Islander peoples through the Indigenous Repatriation Museum Grants Program. The total number of overseas collections is unknown. It includes museums in Austria, Canada, France, Germany, Italy, Japan, New Zealand, Poland, Russia, South Africa, Sweden, Switzerland, the UK, and the US. The Australian Embassies and High Commissions in these countries included Indigenous Repatriation in their ECP programs. Since 2014, the Department has facilitated the return of Australian Indigenous ancestral remains from the United States (1), Canada (1), Germany (48) and the United Kingdom (14). In 2017-18 the funding for this program was A\$659,000 (UNESCO, 2018).

3.2. Language

Table 5: Key figures on language promotion

<i>English Australia</i>	2019	2015
Number of countries where courses are offered	-	-
Number of students enrolled ELICOS	169,864	170,628

As far as language promotion is concerned, Australia does not seem as visible and active as other native English-speaking countries. However, teaching of English as a second language plays a very important role in the international education sector. A quarter of all international university students and almost a third of all international vocational education students used some form of English Language Intensive Courses for Overseas Students (ELICOS) before starting their tertiary studies in Australia (DESE, 2020).

⁹ APRA AMCOS - Australasian Performing Right Association (APRA) and Australasian Mechanical Copyright Owners Society (AMCOS).

English Australia is the national body for the English language teaching sector of international education. It gathers more than 120 members, including public and private providers, independent language colleges, TAFEs,¹⁰ universities, etc. In 2018, these organisations attracted 179,342 English language students from almost 150 different countries (English Australia, 2019, 2020). The Indo-Pacific region figures prominently: the top sending countries were China, Japan, Brazil, Colombia, S. Korea, Thailand, India, Taiwan, Spain, Vietnam (English Australia, 2020).

With English being a *lingua franca*, Australia faces a fierce global competition in language teaching, not only from established players like the UK, but also from emerging low-cost competitors like the Philippines (DESE, 2020). The government has therefore agreed on the English Language Teaching International Engagement Strategy 2025 to ensure Australia's high position in this regard. The move is not surprising if we consider that the English language learning market is expected to be worth nearly A\$50 billion by 2027, and that geographically Asia-Pacific dominates as the sender of English language students (Meticulous Research, 2020).

3.3. Primary and secondary education

Table 6: Key figures on primary and secondary education

	2019	2015
Number of countries	~ 16	-
Number of schools	~ 89	~ 74
Number of students	-	-
Number of staff / teachers	-	-
Government financial support (A\$ million)	-	-

Australian high school diplomas have been awarded abroad since the early 1980s. They have been particularly in high demand in China, the United Arab Emirates (UAE), and South-East Asia and the Pacific. Although there is little available information on the overseas schools sector, one research estimated the total number of licensed schools at around 89 offshore locations. China was the largest host country with 42 schools, followed by Malaysia (10), Papua New Guinea (8), Indonesia (5), South Africa (5), Singapore (3), Vietnam (3), UAE (2), Philippines (2), Vanuatu (2), and one each in Bangladesh, Laos, Nauru, Saudi Arabia, Timor, Zimbabwe (NSW Education Standards Authority, 2019). The unwavering interest of Chinese students is related to prospects of further study at Australian universities and other benefits of foreign curriculum including English as the language of instruction (Burgess, 2016; Maxwell, 2020). Considering the increasing popularity of private education by international providers like Australia, the number of offshore schools may be much higher. The newest addition is the Australian International School Dubai, opening in September 2021 (Gulf News, 2021).

¹⁰ TAFE - technical and further education institutions.

Australian schools abroad are somehow at odds with Australia's strong reputation as a provider of international education. The UK and US represent around 50 per cent of the international (English-medium) schooling market but Australian institutions account for less than 0.01 percent (NSW Education Standards Authority, 2019). This is not to say that Australia cannot improve its profile in pre-tertiary education, in fact the demand for international schools has been growing. The perception of the Australian brand was especially favourable in China, India, Indonesia, Malaysia, the Philippines and Vietnam (ibid.).

3.4. Tertiary education and science

Table 7: Key figures on tertiary education

	2019	2015
Number of countries	New Colombo Plan (NCP): 37 Indo-Pacific countries	
Number of universities / colleges abroad	31 IBCs associated with 14 Australian universities; 10 universities providing offshore distance learning programs ⁽²⁰¹⁴⁾	
Number of domestic universities/ colleges	39	
Number of students		
Number of foreign students	444,514 ⁽²⁰¹⁸⁾	294,438
Number of students at transnational higher education (TNE)	84,227 ⁽²⁰¹⁸⁾	84,700
Number of government scholarships awarded	NCP: 11,321 ⁽²⁰¹⁹⁻²⁰⁾ Australia Awards: 3,053	NCP: 3,100 Australia Awards: 2,367

Table 8: Science & Research

	2019	2015
Number of countries	ACAIR: 35 in the Indo-Pacific CSIRO: 139 active agreements with international institutions	-
Number of institutes	ACIAR (Australian Centre for International Agricultural Research) Australia-China Science and Research Fund (ACSRF) Australia-India Strategic Research Fund (AISRF)	-
Number of researchers / staff	CSIRO: 5,065 ACAIR: 79	
Number of projects	ACIAR: 200 projects, 500 research organisations	-
Number scientists in exchange programs	-	-
Budget (A\$ million)	CSIRO: 1,420 ACAIR: 11.962 ⁽²⁰¹⁹⁻²⁰⁾	-
Government financial support (A\$ million)	-	-

Today, Australia is the world's third-largest provider of education to foreign students. Before the pandemic, international education was the country's fourth most significant source of export income (Earl, 2021). The higher education sector receives over A\$15 billion of Australian Government funding a year, and the contribution of international students to the economy in 2019 was A\$40.3 billion (ANAO, 2020; Universities Australia, 2020). Over the past decade, the education exports have grown rapidly, more than 150 per cent from 2008 to 2019 (Universities Australia, 2020). In 2018, Australian institutions welcomed 444,514 foreign students (UNESCO), making Australia a serious contender for the second most popular study destination, otherwise held by the UK (with 452,079 incoming students) (Universities Australia, 2018). In the same year, China was the biggest source of international students (33%), followed by India (15%) (Universities Australia, 2020).

Australian universities perform very well on the international rankings systems:¹¹ Seven of them are ranked in the top 100, and almost two thirds of all universities are among the best 500 (Universities Australia, 2020). The institutions are also among leaders in transnational

¹¹ The Times Higher Education World University Rankings; Shanghai Jiao Tong University Academic Ranking of Work Universities; QS World University Rankings.

education (TNE). Here, several approaches exist: a) partnerships with foreign universities ('twinning'), international branch campuses (IBCs), and c) distance learning. In the case of Australian universities, the first approach has been considered most desirable. The students finish the first part of their studies in their home country and then complete the qualification at the campus of the awarding institution. One example is the University of Wollongong with twinning agreements with 3 Chinese universities (Croucher, Elliott, Locke, & Yencken, 2020). International branch campuses (IBCs) have physical presence in the host country. However, many institutions are abandoning this model as it is usually complex and unprofitable. At least 14 Australian universities had associated campuses abroad (Ziguras, McBurnie, Marginson, Kaur, & Sawir, 2011). Apart from the physical campuses like the Monash University (Malaysia) and University of Wollongong (United Arab Emirates), Australian institutions are expanding their reach online, either via their own platforms like Deakin Digital, or shared platforms, such as Open Universities Australia (DET, 2015).

In 2018, it was estimated that 84,227 students were registered with Australian TNE providers. Three sending countries dominate: Singapore (26,298), Malaysia (19,350), and China (13,419), followed by Vietnam, the UAE, and Hong Kong. In the major TNE markets like China and Singapore, Australian universities are facing increased competition. India, although perceived as a key market, is not yet well explored due to local regulatory obstacles (Croucher et al., 2020).

The Australian government offers scholarships to individuals from developing countries. The Australia Awards' objective is to help 'partner countries progress their development goals and have positive relationships with Australia that advance mutual interests' (Doyle & Edwards, 2021). Since 2007, 26,044 long-term and 20,261 short-term awards have been offered by DFAT (and the former AusAID) (DFAT, 2021). As part of the Planning for Australia's Future Population in 2019 the government introduced a new scholarship program for domestic and international students, Destination Australia. Funding of A\$15,000 and around 1,000 scholarships will be available each year to study in inland Australia, to jumpstart the growth of regional tertiary institutions (Study Australia, 2021).

On the sending end, 13,319 Australian students studied abroad in 2018 (UIS, 2020). Traditionally, Australian students preferred to study in Anglophone countries due to their lack of foreign language skills (L. Tran & Rahimi, 2018). The top three destinations now are China, USA, UK, and Indo-Pacific countries hosted half of all outbound undergraduate students (ICEF, 2019). The growing popularity of overseas study is related to the government placing high priority on domestic students going abroad, like Gillard's AsiaBound and Rudd's Prime Minister's Asia Awards (L. Tran & Rahimi, 2018), and most recently, the New Colombo Plan (NCP). The scholarship ("Connect to Australia's future – study in the region") aims to leverage outbound student mobility to strengthen Australia's influence in 40 Indo-Pacific countries.¹² It draws on its predecessor, the Colombo Plan, under which students

¹² In 2018 there were 40 possible host locations in the Indo-Pacific for NCP students: Bangladesh, Bhutan, Brunei Darussalam, Cambodia, China, Cook Islands, Federated States of Micronesia, Fiji, French Polynesia, Hong Kong, India, Indonesia, Japan, Kiribati, Laos, Malaysia, Maldives, Marshall Islands, Mongolia, Myanmar, Nauru, Nepal, New Caledonia, Niue, Pakistan, Palau, Papua New Guinea, Philippines, Republic of Korea, Samoa, Singapore, Solomon Islands, Sri Lanka, Taiwan, Thailand, Timor-Leste, Tonga, Tuvalu, Vanuatu and Vietnam (L. Tran & Rahimi, 2018).

from South-East Asia came to study to Australia in the early 1950s. The ‘new’ program initiated in 2014 supports “the best and brightest” Australian students to “live, study and work in the region” but is not just any student mobility program – the NCP is directly linked to DFAT and foreign policy priorities (Australian Government, 2017; Byrne, 2016). Around 10,000 Australians take part each year (11,660 scholarships and grants in 2018-19), and some 40 Australian universities and 300 private sector organisations are involved (DFAT, 2019, 2020a). The government annual funding was around A\$51 million since the 2017 round (L. T. Tran, Stafford, Soejatminah, & Gribble, 2021). With time however, some issues emerged like the geographic balance: the NCP students are predominantly choosing countries like Indonesia, China, Japan (L. Tran & Rahimi, 2018). Even though the NCP has brought multiple benefits to Australian participants, it remains unclear what the soft power function of such a program is (Hong, 2021).

The coming years are likely to bring difficulties for the Australian international education sector. The global shutdown of borders due to Covid-19 was an inevitable drain on the universities but also the country’s coffers. The crisis has exposed the extensive reliance that Australian universities have on the tuition fees of international students, in particular those coming from China. The country stands out as the largest international student market for Australia, and represents 31% of education exports in 2019 (IRU, 2021). The more prestigious universities, the so-called Group of 8,¹³ relied on foreign enrolments for about a third of their revenue (Jayasuriya, 2020). Overall, there were 210,000 fewer foreign students in 2021 than expected, university revenues slumped by A\$1.8 billion, and some 164,000 students were left stranded overseas (AIIA, 2021). The negative effects are likely to spill over into 2022 and 2023 and disrupt the plans set out in the National Strategy for International Education 2025, a 10-year roadmap for establishing Australia as a global leader in education, training, and research. Despite the challenges, there are positive signs. Even in a post pandemic setting, there are still a significant number of student visa applications, an indication that Australia remains an attractive study destination (Hurley, 2021).

Australian science and research are world-renowned. Some of the day-to-day tools that we use are Australian inventions, including high-speed WiFi and Google Maps (DFAT, 2016). Australian researchers collaborate internationally in a number of fields, from marine biology to space exploration. In 2012, Australia, jointly with South Africa, won the bid to host the world’s largest radio telescope, the Square Kilometre Array (SKA). More powerful than the Hubble Space Telescope, SKA will enable astronomers to monitor the skies in greater detail. The estimated project cost of two billion euros will be shared by the ten member states of the SKA organization—Australia, Canada, China, India, Italy, New Zealand, South Africa, Sweden, the Netherlands, and the United Kingdom (Patman & Davis, 2017).

CSIRO (Commonwealth Scientific and Industrial Research Organisation), Australia’s national science agency, is working on international projects in over 50 countries and has three overseas local and international networks (CSIRO, 2020). The body is one of the world’s

¹³ The Group of Eight (Go8) are Australia’s leading research universities - the University of Adelaide, the Australian National University, the University of Melbourne, Monash University, UNSW Sydney, the University of Queensland, the University of Sydney and the University of Western Australia.

largest governmental research agencies¹⁴ with an annual budget exceeding A\$1.3 billion, with the government contributing approx. 60% (Tatiana & Evgeniya, 2018). Cooperation in science is becoming increasingly important, especially on a bilateral level. Australia-China Science and Research Fund (ACSRF), established in 2011, comprises joint research centres, bilateral group missions and knowledge exchange. Similarly, the Australia-India Strategic Research Fund (AISRF) facilitates collaboration between Indian and Australian scientists. Examples of science collaboration are too many to be cited here but not to go without a mention is the Australian Centre for International Agricultural Research (ACIAR) which funds research partnerships between Australian scientists and their colleagues in developing countries. Since its inception in 1982, ACIAR has completed over 1,500 research projects in 36 countries, partnering 150 institutions with more than 50 Australian research organisations (Australian Government, 2020b). ACIAR has regional offices in China, India, Indonesia, Kenya, Papua New Guinea, the Philippines, Laos, and Vietnam.

3.5. Foreign Media

Table 9: Key figures on foreign broadcasting

	2019	2015 (Australia Plus)
TV		
Number of countries broadcasted to	37 countries & territories in the Indo-Pacific	40
Number of languages	4 (Mandarin, Bahasa Indonesia, Tok Pisin and English)	-
ABC Australia		
Number of channels	-	-
Audience / monthly	406,000 ⁽²⁰¹⁸⁾	-
Digital & social media audience (million / monthly)	9.3 on ABC digital platforms	-
Budget (A\$ million)	ABC International services: 11 ⁽²⁰¹⁷⁻²⁰¹⁸⁾ Amplifying Australia's voice in the Pacific ⁽²⁰¹⁹⁻²⁰⁾ 5.7	DFAT grant: 4.58 (2014, 20.8)

¹⁴ Other relevant government institutions are the Department of Innovation, Industry, Science and Research, Australian Astronomical Observatory, National Measurement Institute, Defence Science and Technology Group, Australian Research Council (Tatiana & Evgeniya, 2018).

Radio	2019	2015
Number of countries broadcasted to	-	-
Number of languages	English, Tok Pisin	3 (English, Tok Pisin and French)
ABC Radio Australia		
Number of channels	-	-
Audience / monthly average ¹⁵	101,558 ⁽²⁰¹⁸⁾ 240,861 podcast downloads	-
Digital & social media audience (million)	8.6 million	-
Number of streams (online) / international		
New Media		
Social networks following (international followers)	ABC Facebook accounts: 14.6 million ABC Instagram accounts: 375,000 ABC YouTube channels: 245.3 million views Australia Plus Learn English: 4,789,000 (Facebook) 115,000 (YT) ABC Australia 115,000 (YT)	⁽²⁰¹⁶⁾ Australia Plus: 150,000 (Facebook) 70,000 (YT) Australia Plus Learn English: 3.9 million (Facebook)
Audience / unique visitors	(2018-19): 152.6 million international sessions on ABC websites 18.5 million international sessions on ABC apps 27.4 million podcast downloads by international audiences	-

The ABC (Australian Broadcasting Corporation) is the national broadcaster. Modelled on its British counterpart, the ABC is a publicly owned body funded principally through government grants. The second public broadcaster, Special Broadcasting Service Corporation (SBS) provides multilingual and multicultural radio, television, and digital services to reflect Australia's rich diversity and multiculturalism (UNESCO, 2018).

¹⁵ The ABC's Asia-Pacific Audience Footprint (Jan – Jun 2018) (excludes Australia/NZ) (ABC, 2018).

Apart from its domestic engagement, the ABC has international services through which it projects Australia's values and identity to a wider world, (ABC Australia) in 4 languages, Mandarin, Bahasa Indonesia, Tok Pisin (Papua New Guinea), and English (ABC, 2018). The ABC maintains international presence with 11 bureaux and news correspondents in Bangkok, Beijing, Beirut, Jakarta, Jerusalem, London, Nairobi, New Delhi, Port Moresby, Tokyo, Washington (ABC, 2019). The public broadcaster is further involved in international media development activities through its ABCID program aimed at strengthening media in the Indo-Pacific.

The ABC's strategy within available funding of A\$11 million (2018) for overseas broadcasting is focused on these key target groups:

- Highly educated and mobile “influencers” in the key Asian markets (PRC and Chinese diaspora, Indonesia, India)
- PNG and wider audiences in the Pacific
- Australians living or travelling abroad
- Culturally and linguistically diverse (CALD) communities within Australia

In addition, ABC Australia services are intended for audiences throughout the Asia Pacific, and via digital platforms, to the rest of the globe (ABC, 2018).

ABC Radio Australia is broadcast as an FM service across the Pacific and streamed via the Internet. The Robert Menzies government launched the overseas shortwave service ‘Australia Calling’ in 1939 to counter disinformation (Scott, 2010). With the adoption of the 1983 Australian Broadcasting Act, Radio Australia became the responsibility of the ABC. Apart from informing Australian citizens abroad, its mandate was to “encourage awareness of Australia and an international understanding of Australian attitudes on world affairs” (Australian Government, 2018a).

As ABC's outlet, Radio Australia's operations were always dependent on the available resources. 2014 especially was a critical year. DFAT terminated its ten-year contract with the ABC to provide the Australia Network Service, resulting in a loss of more than 60% of the ABC's budget for international media services and the dismissal of 80 staff from the international division (Clark, 2021). By the end of 2016, the Burmese, Khmer, Vietnamese, and French language services were discontinued.¹⁶ The Lowy Institute called this “a gutting of the service and a fundamental misunderstanding of the importance of the service into the Pacific” (O’Keeffe & Greene, 2019). The demise of the international station continued in 2017 when the shortwave broadcasts to the Pacific were officially terminated. Such move had left many vulnerable areas in the island region where access to technology is limited,¹⁷ and especially since China Radio International took over Australia's old shortwave frequencies (Bainbridge, Graue, & Zhou, 2018). The loss of shortwave caused a public outcry, so that in 2018 the government opened a public review of media services in the Pacific (Australian Government, 2018b). In 2018, the radio was rebranded as ABC Radio Australia. It broadcasts in English and offers shorter programs in pidgin languages like Tok Pisin (Clark, 2021).

¹⁶ In the past, the ABC has produced content in Hindi, Bahasa Indonesia, Japanese, Thai, Khmer, Vietnamese, Khmer, Burmese, Mandarin, Cantonese, Fukinese, French, Dutch, German, French and Tok Pisin (ABC, 2018).

¹⁷ Many island nations have limited access to the Internet and radio is a key medium in PNG and the Pacific. The shortwave possesses some advantages to newer technologies. It can be used in situations where satellite or online communications are temporarily unavailable (like during thunderstorms or cyclone) or unaffordable. Shortwave travels larger distances with less power and infrastructure than FM broadcasts.

The ABC first launched an international television station in 1993 (formerly ABC Australia Television International, ABC Asia Pacific, Australia Network) and since 2018 is rebranded as ABC Australia, an international television digital service with a mission to inform and entertain the audiences “with a uniquely Australian perspective”. The channel is available in 37 countries and territories across the Asia Pacific and the Indian subcontinent. In 2018, across nine markets, there were 406,000 frequent viewers of ABC Australia each month (ABC, 2019). The programming is a combination of approximately 80% ABC News and 20% other content. For many years, the International Strategy also funded the production of short English language learning programs (ABC Australia, n.d.).

Although it can look back on a tradition of 80 years, Australia is not well-established in the foreign media market, or at least not outside the Pacific. For comparison, the funding for the BBC and Deutsche Welle was over 300 million USD each, while Australia’s international broadcasting receives only 7.8 million USD (A\$11 million) from the government (in 2010, 34 million USD or A\$43.5 million were available) (O’Keeffe & Greene, 2019; O’Keeffe & Oliver, 2010). That is lower than would be expected for such a strong economy (14th GDP worldwide). Even the regional focus might be challenged – the Pacific islander journalists have repeatedly pointed out ABC’s failure to understand its overseas audiences by offering Australia-centric programs and ignoring the Pacific in its news coverage (Heriot, 2019). With other international broadcasters eager to fill in the void, Australia’s standing as a regional power is further undermined. The fact is perhaps one reason why the government introduced the Amplifying Australia’s Voice in the Pacific program, a part of measures aimed to strengthen Australia’s engagement with the region. Starting in 2019-20, and over the period of 3 years, A\$17 million will be provided to FreeTV Australia, to deliver 1000 hours of Australian television content to broadcasters in the Pacific (DOCA, 2019).

4. Challenges and future outlook

Presently, Australia is far-removed from a mere “European-derivative culture”. The country seeks to project an image of a complex nation with a unique history and nature, strong economy, scientific excellence, and cultural diversity (Wyszomirski et al., 2003). On the other hand, critics point out the country’s obvious diplomatic and reputational deficit (Carter, 2015; Conley Tyler, 2019b). Anecdotally, Australia is famous for its world-class universities, sun-drenched beaches, stunning nature, and friendly people, but little is known about its culture, especially indigenous tradition (Madden, 2011). In its international dealings, Australia is inching closer to economic rather than cultural diplomacy, and this might not always be the best strategy, especially for a small-population country with global aspirations. As the former Prime Minister Kevin Rudd declared: “Given the vast continent we occupy, the small population we have and our unique geo-strategic circumstances, our diplomacy must be the best in the world” (Lowy Institute, 2009). And yet, Australian ECP efforts are still dispersed (Ang et al., 2015) and rarely fit into Australia’s ‘economically-driven diplomatic agenda’ (Carey, 2018).

Australian tertiary education is a well-known and successful global brand. However, the Covid-19 pandemic has put its strength to the test, revealing many neglected but relevant aspects. Now, concerns are being raised whether Australian universities have been too reliant on international tuition fees as the primary source of revenue and focusing exclusively on selected countries for student enrolment. If the inflow of international students is the

indicator of Australia's soft power, the country seems to be on the wrong track. The national borders are likely to stay shut until at least mid-2022. Even after that, there might be economic losses in the long run because of cutthroat competition on the international education market. If Australia chooses to stay a 'hermit nation' (Lester, 2021) for too long, foreign students will turn to other countries.

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