ACU Vision 2033

Our Landscape

ACU
AUSTRALIAN CATHOLIC UNIVERSITY

Contents

Acknowledgement of Country

In recognition of Aboriginal and Torres Strait Islander Peoples' deep spiritual connection to Country, and in continuing the university's commitment to reconciliation, it is customary to acknowledge Country as we pass through it. We acknowledge and pay our respects to the First Peoples, the Traditional Custodians of the lands and waterways where Australian Catholic University campuses are located, and we thank them for their continued custodianship.

About Our Landscape ACU Vision 2033

Our Landscape – ACU Vision 2033 aims to provide the ACU community with an overview of the external and internal landscape in which we currently operate as a higher education institution. The first section includes core insights on the socio-economic, regulatory, and overall sectoral trends and dynamics which are likely to impact higher education in the years to come. The second section provides an overview of our unique Catholic landscape, our guiding framework as a Catholic university, as well as emerging local and global trends. Finally, the third section takes an inward look at our institutional performance against key success indicators.

The Australian higher education landscape

This section provides a starting point for conversations on the trends, challenges and opportunities in the external landscape that are likely to impact on ACU's future strategic direction.

Domestic population – Australia's population is changing, we are getting older, and growth has slowed

Australia's population is estimated to be 25.4 million people in 2020 and is projected to grow to 29.3 million by 2032—a projected reduction in size by 4.9 per cent when compared with pre-pandemic forecasts.[2] Previously, overseas migration to Australia was the largest contributor to population growth, however, recent international travel restrictions and quarantine arrangements have resulted in the first net overseas migration loss since 1946.[3] The fertility rate has declined since 2010 and is below replacement. Australians are also starting their family later in life by up to six years, with the median age of parents increasing to 31.6 years for mothers and 33.6 years for fathers.[4]

An ageing population is becoming a global concern.[5] In Australia, life expectancy is to rise from 85.5 years (2021–2022) to 86.7 years (2031–2032) in women, and from 81.6 (2021–2022) to 83.2 (2031–2032) in men. The old-age dependency ratio (i.e., number of people of traditional working-age for every person aged 65 and over) is projected to be 3.2 in 2031–2032, compared to 3.7 in 2021–2022.[6]

Economy – Australia's economy continues to grow and evolve, but long-term effects of the pandemic and global tensions create uncertainty

The Australian economy has grown 3.3 per cent over the past year. Wages increased by 2.4 per cent over the year to March 2022,[7] while inflation increased to 5.1 per cent over the same period.[8] The long-term effects of the pandemic and subsequent policy measures remain unclear but are likely to continue affecting the Australian economy for some years to come.

The nature of Australia's economy and business models are rapidly changing. Because of the pandemic, Australia's consumer and business digital adoption are estimated to have progressed five years through the need to adapt to remote working conditions.[9] Growth in digital activity has outpaced overall growth in the economy, accounting for 5.9 per cent ($109 billion) of total economy value, an increase from 5.6 per cent in 2018–2019.[10]

The global economic and political outlook remains highly uncertain as a result of the long-lasting effects of the pandemic, Russia's invasion of Ukraine, and rising tension in the Indo-Pacific region. With rising global inflationary pressures and ongoing disruptions to supply chain, a global recession may be on the horizon.[11] The shift of power to the Indo-Pacific is expected to continue over the next 40 years, which could see the geopolitical environment in the region becoming less stable and more contested. By 2030, it is anticipated that Asia will be responsible for over half of the world's economic output, consume 40 per cent of its energy, and have a middle class of almost 3.5 billion people.[12]

Employment and skills – universities will continue to play a crucial role in meeting workforce and skills needs

Today, Australia's unemployment rate is at an all-time low of 3.5 per cent, with the number of people employed, participation rates, and monthly hours worked all continuing to increase.[13] Australia is facing a critical workforce and skills shortage with nearly a third of Australian businesses having difficulties sourcing staff.[14] However, there are still significant inequalities in Australia's labour market – many that were exacerbated during the pandemic – and the level of insecure work is on the rise.

Over the past 20 years, workforce growth has been especially strong in two key areas: health and education. Demand for skilled workers in both these areas is expected to continue to grow strongly. By 2026, it is predicted 'health care and social assistance' and 'education and training' will be two of the fastest growing industries in Australia, growing by 15.8 per cent and 13.4 per cent respectively.[15]

Digital technology is enhancing jobs across the market, irrespective of the industry or segment, with technology expected to augment 4.5 million Australian jobs by 2034.[16] Skills that will become vital for the changing job landscape will include infection control, data analysis, social media, enterprise resource planning, equipment repair and maintenance, and graphic and visual design software. Emerging jobs are expected to be in areas such as digital deepening (digital marketing, social media, user experience), data analytics, regulatory, health, sustainable engineering and trades, and emerging business practices (agile coaches, logistics analysts).[17]

Universities will play a crucial role in educating the professionals to meet the growing demand for a highly skilled workforce. According to the National Skills Commission, Skill Level 1 occupations, which usually require a bachelor's degree or above, are expected to account for over half of the projected total employment growth in Australia to 2026.[18]

Government policy – higher education funding is evolving to meet national priorities

In response to the pandemic, the federal government has been implementing changes to its higher education funding policies. The Job-ready Graduates Package came into effect in 2021. This seeks to "deliver more job-ready graduates in the disciplines and regions where they are needed most"[19] to aid Australia's recovery from the pandemic. It also increases the average student contribution to Commonwealth supported places with students in courses such as arts and humanities paying a higher proportion while those in workforce priority areas such as nursing and teaching pay less.[20]

In 2021, new research quality criteria were approved for inclusion in the Higher Education Standards Framework.[21] To meet the threshold standards for an Australian University, institutions will be assessed on the quality of research as well as the size and scope of its research community. For Australian universities, this signals the need to invest in research capacity to boost performance and retain their category status, as the use of the 'University' title is restricted to those institutions producing high-quality research as assessed by the Excellence in Research for Australia and the Engagement and Impact Assessment (currently under review).

On 6 July 2022, the new Minister for Education, the Hon. Jason Clare MP, delivered his first address to the higher education sector at the Universities Australia Conference. Minister Clare outlined the new Federal Government's immediate priorities for the sector, some of which deliver on policy commitments Labor took to the federal election in May 2022. The Government has committed to:

- Reach an Australian Universities Accord following a holistic review of the sector including issues of funding and access, regulation, employment conditions, and how universities, TAFEs and other tertiary education and training providers work together. The process would draw on advice from across the university sector (students, staff, and unions), business, parents, and all political parties. Further details including a timeline for this process are yet to be announced.
- Clear the backlog of unprocessed international student visas to assist in rebuilding international education in Australia.
- Respond to the report on National Security Risks Affecting the Australian Higher Education and Research Sector prepared by the Parliamentary Joint Committee on Intelligence and Security.
- Provide $20 million in additional funding for the National Centre for Student Equity in Higher Education, based at Curtin University in Western Australia.

The commercialisation of university research was a significant priority of the former Coalition Government. The Morrison Government committed $2.2 billion to support the translation and commercialisation of Australian university research to aid Australia's economic recovery from the pandemic. This includes the development of guidance materials to foster university research commercialisation by supporting the successful negotiation and management of university-industry collaborations and partnerships – e.g., via standardised intellectual property agreements. A University Research Commercialisation Action Plan has been launched and seeks to build on the National Manufacturing Priorities set out in the Modern Manufacturing Strategy. Labor has indicated its broad support of developments in this area and Minister Clare has commented that "the former government did some good things to encourage translation and boost commercialisation". The Labor Government will build on this work through a commitment to create Start Up Year loans to help up to 2,000 final year students and recent graduates to "bring their ideas to life".

Market competition – universities are facing new competition in areas outside the traditional on-campus accredited offer

The Australian higher education sector comprises 42 universities, four university colleges, 143 institutes of higher education, and one overseas university registered as higher education providers.[22] In 2020, over 1.4 million students were enrolled in a public university, and a further 170,000 students were enrolled in a private university or non-university higher education institution.[23]

The competitors in Australia's higher education landscape are changing. In July 2021, the Tertiary Education Quality and Standards Agency implemented new provider category standards and introduced an entirely new category – 'University College.' Institutions in this category can self-accredit programs but are not subject to the same expectations for research output and quality as institutions in the Australian University category.[24]

Education technology or 'EdTech' has also been flourishing. Capitalising on market instability and rapid product delivery, global venture capital investment in this sector doubled between 2018–2020, with the market leaders China and the United States accounting for 53 per cent and 33 per cent of the market (respectively).[25] In Australia, the market almost doubled[26] and growth was heightened by the pandemic and associated new remote learning needs. By 2025, spending on digital education is expected to increase to a total of $341 billion, with the most common product offerings being online courses and remote learning services, educational content, learning management systems and services, and teaching services.[27] Driven by student demand for access and digitisation, the rise of EdTech is forcing the university sector to transform and is further increasing competition between institutions.[28]

Alternative qualifications such as micro-credentials, digital badges and industry-recognised certificates are also emerging in the sector. Linked-In Learning, EdX, Google and Amazon, for example, offer professional accreditations that are promoted as industry recognised. These alternatives provide students with the opportunity to receive a certificate from a well-known brand but are often more affordable (even free in some cases), accessible from anywhere in the world, and can be completed in a shorter amount of time. In doing so, these credentials are bridging the traditional degrees offered by higher education institutions and the skills that employers are seeking as well as meeting the growing demands for rapid reskilling.[29]

International student market – international students remain an important part of Australia's higher education sector

International students are a valuable part of Australian classrooms, industries, and communities. Over and above the significant revenue they generate, they are important for enhancing national capability and bringing new perspectives and ideas to their university communities.

Prior to the pandemic, education was Australia's third largest export and generated an estimated $31.7 billion in 2020, a growth of approximately 113 per cent since 2012–2013.[30] With the rapid growth of the international student market, universities were becoming increasingly dependent on the revenue obtained from this source. The COVID-19 pandemic led to a $1.9 billion revenue drop, with 28 Australian universities reporting a decrease in total income in 2020.[31]

Even before COVID-19, there was discussion surrounding the tertiary sector's reliance on a limited number of international student source markets. In the years leading up to the pandemic, university business models were increasingly reliant on the revenue generated by international students from two key source markets: China and India. Another challenge has been the inability to allow students to study with Australian universities online from overseas.

Currently, students outside of Australia are not within the scope of the Education Services for Overseas Students Act and associated National Code framework. It also does not consider online or blended learning models which precludes flexibility.

If Australia is to move aggressively into new forms of Transnational Education or program delivery, the legislative and regulatory framework requires adjustment to ensure that Australia continues to deliver a high-quality experience no matter where our students are studying in the world and facilitate a more flexible blend of off-shore and on-shore enrolment opportunity. Australia's success in any efforts to diversify its international education opportunities rests not only on collaboration and coordination, but also on a demonstrable commitment to promoting emerging markets and new modes of educational delivery at the national level.

Digital transformation – the impact of digital on all aspects of education and work is accelerating, our students are already digital natives

As the higher education sector transitions towards market-driven operation, students are acknowledged as being critical and discerning consumers of the services and products that universities offer. The reality is that students now require and demand an educational experience which is personalised, seamless, and flexible. With a broader array of higher education providers available, return on investment is also becoming an increasingly important consideration for students. Acting to meet these expectations is critical if universities are to survive. If they do not deliver such a service, the student consumer will simply look to other providers that can.

The world has gone through a digital change, and the next cohorts of students are increasingly digital natives. Over the last decade, fully online education has expanded and grown to become a major part of the Australian education sector, with the value of fully online education estimated at $8.4 billion in 2022.[32]

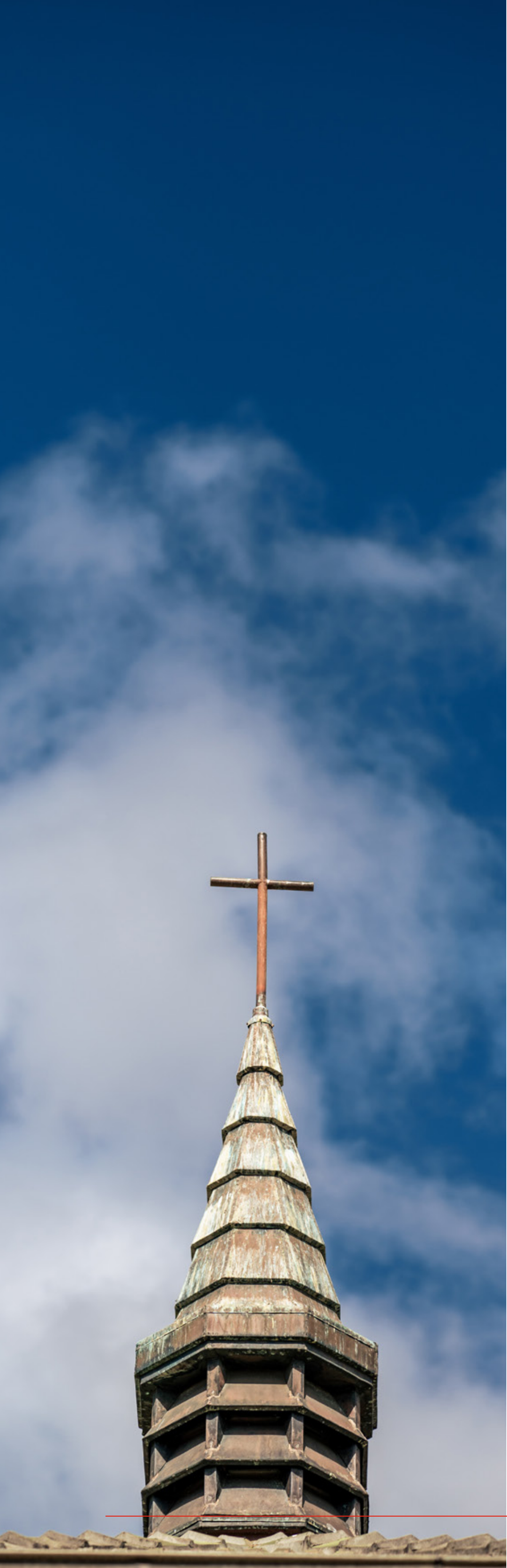
The higher education sector is facing a new era where institutions must become digitally mature in order to protect themselves from disruptions, such as the ones they have recently experienced. Those that are not, may be exposing themselves to undue risk in an ever-increasing digital landscape. While technological and digital emphasis in education service delivery may not have been an urgent priority for many Australian universities before 2020, these institutions are now bringing the digital imperative straight to the forefront of their investment and strategic focus. But this approach requires proactive and careful planning. Whilst the urgent and hurried steps taken by many universities to ameliorate the impact of sudden lockdowns during the COVID pandemic by taking their teaching online were impressive, a sophisticated and sustainable program of digital transformation of education delivery requires careful and astute implementation.

Engagement and impact – universities are increasingly being called upon to demonstrate their positive impact on their communities

In addition to education and research, external engagement is the 'third mission' of a university.[33,34] Through engagement, universities use their resources and expertise to benefit broader society. Increasingly, an explicit requirement for universities to be responding to societal and global needs is a policy priority for governments. The expectation is that universities will actively engage with communities, partners, and external stakeholders with a view to achieving measurable positive social impact.

Such activities are now being assessed alongside other university performance indicators. One example is the role that universities play in helping governments achieve targets set by the United Nations 2030 Agenda for Sustainable Development. The performance of universities in addressing Sustainable Development Goals is now reported annually by the Times Higher Education Impact Rankings.[35]

Another example is research impact. To better account for government funding, for instance, Australian universities must not only characterise the quality of their research activities through traditional excellence metrics (e.g., journal rankings, citation frequency, h-index) but also by the "contribution that [their] research makes to the economy, society, environment or culture, beyond the contribution to academic research".[36]



Australian Catholic landscape

Catholic demographic trends

Catholics account for 18 per cent of the world's population.[37] Nearly half of the world's Catholic population lives in the Americas, with 28 per cent residing in Latin America.[38] In 2020, the Catholic community grew by 2.1 in Africa and 1.8 per cent in Southeast Asia. The European Catholic population saw a slight increase of 0.3 per cent.[39]

In Australia, Christianity remains the most common religion but has seen a significant decline over the past thirty years. In 1991, for example, 74 per cent of Australians reported being Christian compared to 44 per cent in 2021.[40] Over the same period, Australia's Catholic population experienced a smaller decline, dropping from 27 to 20 percent.[41]

Mass attendance rates have seen a steady decline in Australia over the past thirty years. Only 12 per cent of the national Catholic population attends Mass on a typical weekend, a decline from 18 per cent since 1996.[42] The percentage of Mass-attenders born in non-English-speaking countries has increased by 19 per cent since 1996.[43] The Australian Mass-attending Catholic population is ageing rapidly. Less than 6 per cent of the Catholic youth, aged 20-24, attends Mass on a typical weekend.

There are fewer Catholic priests in Australia than in the past. In 2017, there was one priest for every 1825 Catholics.[44] There is also an ongoing national clergy shortage[45], which has been mitigated by a significant increase in the number of overseas-born priests working in local dioceses. In 2017, 51 per cent of Catholic priests in Australia were born overseas.[46]

Catholic education in Australia

There are approximately 1,755 Catholic schools in Australia, educating 785,000 students nationwide, or one in five Australian school children. In terms of distribution, 51 per cent of Catholic school students are enrolled at the primary level and 48.3 per cent at the secondary level.[47]

In the span of a decade, the number of Catholic schools in Australia has grown 3 per cent, with the largest proportional growth seen in the Northern Territory. Overall, New South Wales has the highest number of Catholic schools (595) and enrolments (approximately 259,000), followed by Victoria, with 498 schools and approximately 210,000 students.[48]

There are two Catholic universities in Australia and numerous theological colleges that offer tertiary level courses. Amongst these providers, Australian Catholic University educates the largest number of students (33,000), followed by The University of Notre Dame Australia (12,000), the Catholic Theological College (330), and Campion College (144).[49]

Catholic health in Australia

The network of hospitals, aged and community care services which constitute Catholic Health Australia (CHA) delivers 10 per cent of hospital and aged care services nationwide. This makes it the largest non-government provider of these services. With 85 hospitals, more than 25,000 residential aged care beds, and approximately 50,000 home care and support consumers, Catholic health and aged care plays a leadership role in providing compassionate health, aged and community care for Australians. In 2021, the Catholic health and aged care sector employed over 87,000 workers and generated $8 billion in annual hospital revenue.[50] In the past twenty-five years, the canonical governance of large Catholic health organisations has shifted from religious congregations to Ministerial Public Juridic Person (MPJP) structures, which are largely led by lay people. This demonstrates the growing place and relevance that lay ecclesial leadership plays in canonical governance.[51]

The Catholic university

A Catholic university adheres to fundamental values-based principles and knowledge which has developed from a 2000-year-old tradition of Christian intellectual endeavor. It arises "from the heart of the church" and must be committed to the Catholic Church and its Christian message. In 1990, Pope John Paul II issued the Apostolic Constitution *Ex Corde Ecclesiae* which articulates the role of a Catholic university:

> Every Catholic University, as a university, is an academic community which, in a rigorous and critical fashion, assists in the protection and advancement of human dignity and of a cultural heritage through research, teaching and various services offered to the local, national and international communities. It possesses that institutional autonomy necessary to perform its functions effectively and guarantees its members academic freedom, so long as the rights of the individual person and of the community are preserved within the confines of the truth and the common good.[52]

Pope Francis has affirmed the position that the Catholic university is an "authentic human community animated by the spirit of Christ"[53], one which he says is "a community of study, research, and formation"[54] with an obligation to protect and expand Catholic intellectual tradition.

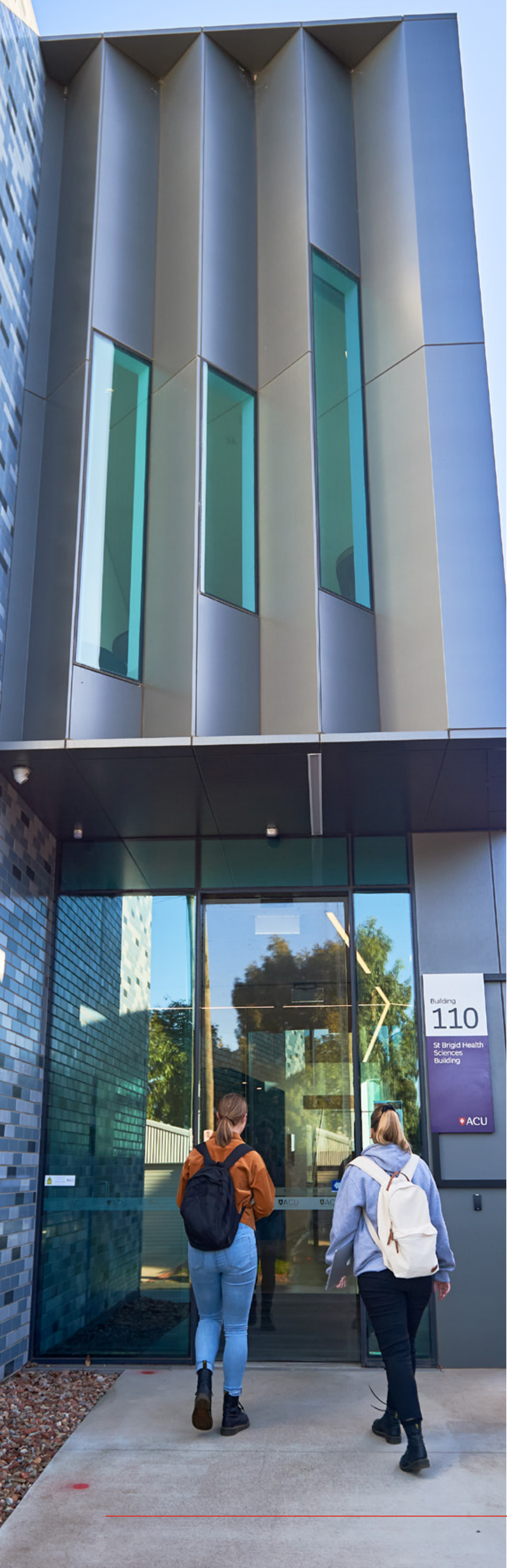
In addition to the challenges arising from the changing landscape of global higher education, Catholic universities face additional issues. These include rising secularisation, reduced receptivity to overall intellectual traditions and practices, and a devaluing of the Liberal Arts tradition as a valuable field of education and enquiry.[55] In the Australian context, the post-Royal Commission environment presents ongoing challenges for public perceptions of the Church.[56]

Church synodality

To ensure that consultation with the Catholic community is the *modus vivendi et operandi* of the Catholic Church, Pope Francis has launched a two-year synodal path.[57] With his call to "listen to one another [and…] embark on a discernment of the times in which we are living"[58], the Catholic community has now commenced a global consultation process. The synodal path is the process which "God expects of the Church of the third millennium."[59] In the words of Pope Francis, synodality is driven by "openness, courage, and a willingness to let ourselves be challenged by the presence and stories of others." Through listening to the experiences and insights of everyday Catholics, the XVI Ordinary General Assembly of the Synod of Bishops in 2023 will prepare a series of propositions for the Pope's consideration. Key themes on Mission identified by the Australian Synthesis[60] relate to a commitment to social justice and care of the Earth; welfare, education, and equity; evangelisation, and encouraging co-responsibility for the Church's Mission.[61]

This document is written against the backdrop of the Fifth Plenary Council of Australia, with the First Assembly held in 2021. The Plenary Council is a formal meeting of bishops and representatives of all the dioceses, eparchies, and agencies of the Catholic Church in Australia. It can determine Church laws based on the results of its discernment. For the first time in the history of the Plenary Council, lay men and women were in attendance. It engaged with themes that have been distilled from a listening and dialogue phase, which received 17,000 submissions on behalf of 222,000 people on the future of the Catholic Church in Australia. The Plenary Council explicitly addressed the challenges confronting the Catholic Church, including "indifference and even hostility [towards the Church]". It called for "greater levels of accountability and transparency."[62]

In July 2022, the Second General Assembly continued the discernment process and confirmed the decrees to be sent to the Holy See for review and recognition, after which they will be promulgated.[63] These included decrees relating to reconciliation; seeking healing; evangelisation; witnessing the equal dignity of women and men; lay formation and leadership for mission and ministry; and a commitment to the preservation of our common home.[64]



Australian Catholic University landscape

This section provides a starting point for conversations on the trends, challenges and opportunities that are likely to emerge as an outcome of ACU's performance to-date.

Our students

The implementation of a demand driven system in 2012 allowed ACU to rapidly increase its scale. Between 2012 and 2017, ACU had the second fastest growth in domestic student load nationally. From 2018, total student enrolments declined, with enrolment numbers stabilising over the past couple of years.

Melbourne Campus is ACU's largest campus in terms of enrolment, followed by Brisbane, North Sydney and Strathfield campuses. Online enrolments are increasing.

The majority of student enrolments are within health and education. Three courses in health and seven courses in education account for over half (55 per cent) of enrolled students.

A "typical" ACU student is studying towards an undergraduate degree (79 per cent), is female (74 per cent) and is less than 24 years of age (70 per cent).

Of our domestic cohort, 2 per cent of students are Aboriginal and Torres Strait Islander peoples and 12 per cent come from areas with a low socio-economic status.

ACU is well below the sector average for the proportion of revenue from international student fees. International students make up 11 per cent of our student cohort. ACU's top four source countries are Nepal, India, Kenya, and Vietnam.

Student experience

ACU has been ranked Victoria's top university and 10th nationally (from 15th in 2020 and 20th place in 2019) in the recently released 2021 Student Experience Survey (SES). Attesting to ACU's success, all indicators improved compared to 2020 results. Overall satisfaction was 3.9 per cent above sector (76.9 vs 73.0), with strong indicator results:

- 5th in skills development
- 8th in learner engagement
- 11th in teaching quality
- 12th in learning resources
- 14th in student support.

According to the latest data from the International Student Barometer (2021), ACU outperforms the national Australia Higher Education ISB average on international students' overall satisfaction with their educational experience (ACU 85 per cent, Australia HE ISB 82.6 per cent).

Our workforce

ACU employs around 2,500 staff (FTE), split evenly between academic and professional staff. The majority of our staff are full-time (64 per cent), followed by casual (22 per cent) and fractional full-time (14 per cent). The location of our staff mirrors our student enrolment, with the majority of staff residing on Melbourne campus (33 per cent), followed by North Sydney (29 per cent) and Brisbane (21 per cent).

More than half of academic staff work within the Faculty of Health Sciences (54 per cent), followed by the Faculty of Education and Arts (25 per cent), the Faculty of Law and Business (8 per cent) and the Faculty of Theology and Philosophy (7 per cent). A further 6 per cent are not in faculty.

Research and engagement

Within a relatively short period of time, we have become a leading Australian university, with a research output strongly aligned with our strategic priorities. This performance is attested by ACU's performance in the 2018 Excellence in Research for Australia evaluation results. These results demonstrate ACU is achieving research outcomes at above or well above world standard in areas of strategic priority[65], including the following fields:

- cardiorespiratory medicine and hematology
- clinical sciences
- cognitive sciences
- human movement and sports science
- nursing
- nutrition and dietetics
- psychology
- public health and health services
- religion and religious studies
- specialist studies in education.

World university rankings

In 2022, ACU is ranked in the top 2 per cent of all universities worldwide[66], with rankings in Times Higher Education World University Rankings, Academic Ranking of World Universities, QS World University Rankings and US News Best Global Universities.

In 2022, ACU is also a global leader in the Catholic higher education sector, and ranked in the top 10 Catholic universities worldwide.[67]

In addition, a key milestone for ACU in 2022 is its recognition by Times Higher Education Young University Rankings as the one of the world's top 40 young universities. This competitive global ranking is based on a comprehensive performance methodology, which extends beyond teaching and research to include key metrics such as knowledge transfer, and international outlook.

ACU is a global leader in its subject specialisations, including the following:

- ranked 14th globally for nursing[68]
- ranked 26th globally for theology, divinity and religious studies and 1st in Australia[69]
- ranked 36th globally for sport science[70]
- ranked in top 50 globally for education[71]
- ranked in top 150 globally for psychology[72]
- ranked in top 250 for arts and humanities[73]
- ranked in top 300 for law[74].

Financial performance

During 2021, ACU generated $565.9 million revenue from continuing operations, and incurred $507.3 million expenses. The net result for the period was $47.3 million, a 51 per cent increase on the previous financial year as actual revenues exceeded a conservative pandemic budget.

ACU is heavily dependent on Commonwealth income. Whilst enrolments and associated revenue declined, Commonwealth financial assistance increased 18 per cent to $288.9 million largely due to transitional funding provided to support the reduction in HECS funding.

Following a period of decline in Higher Education Research Data Collection (HERDC) income, ACU's annual HERDC income for 2021 showed a significant increase, in particular in Category 2 (other public sector research funding) and Category 3 (industry and other funding for research).

Expenditure from continuing operations reduced 1 per cent to $507.3 million. The majority of expenses, or 68 per cent, comprises employee benefits. Based on the most recent comparative figures, ACU has one of the largest employee benefits in proportional total expenditure compared to the sector.

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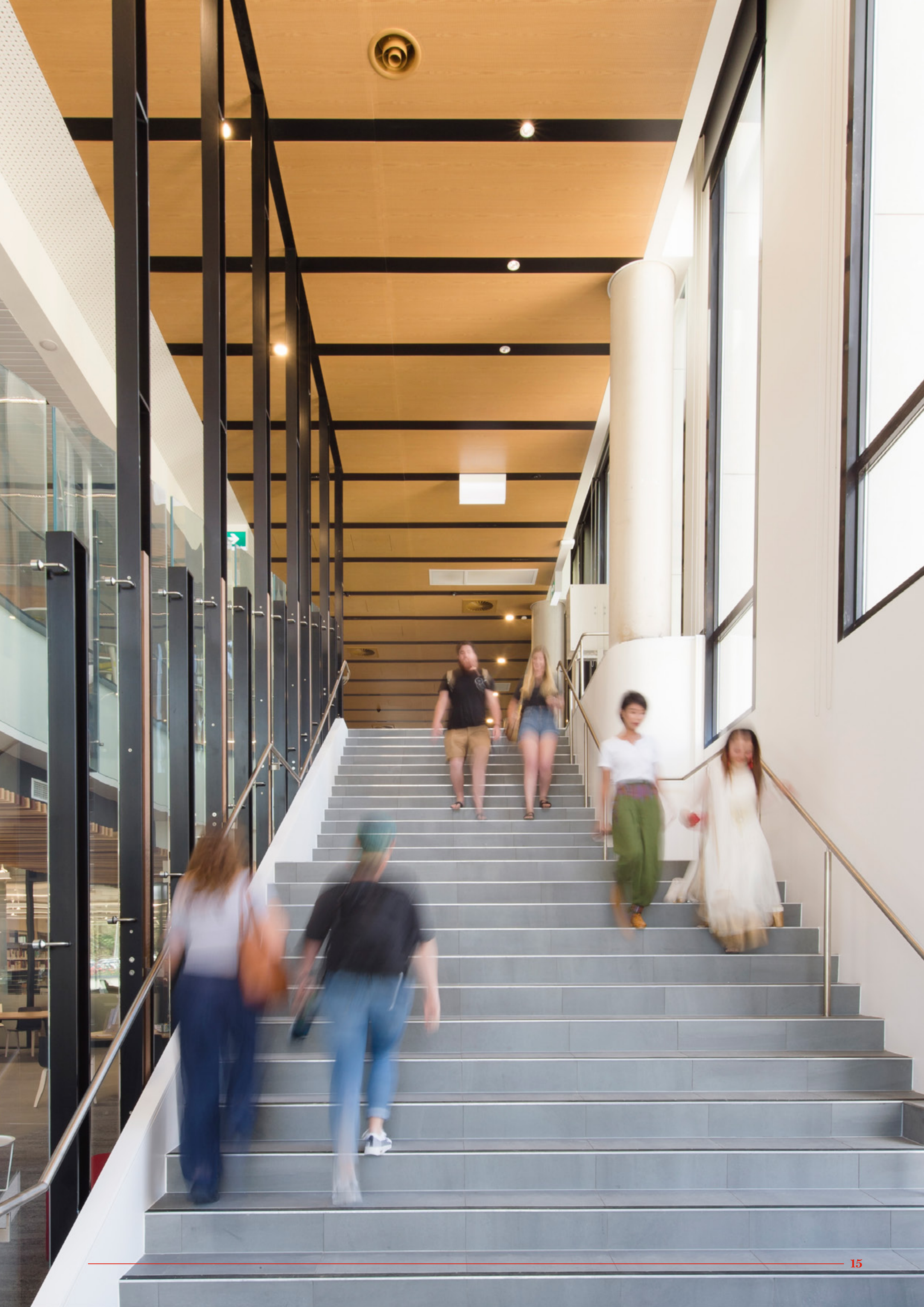
64. Plenary Council (2019). *The Second General Assembly of the Fifth Plenary Council of Australia*. plenarycouncil.catholic.org.au (accessed on 15 September).
65. Excellence in Research for Australia (ERA), 2018.
66. Percentage calculated as a proportion of the total number of universities in the world.
67. International Federation of Catholic Universities member universities ranked on Times Higher Education World University Rankings 2022.
68. Shanghai Ranking, Global Ranking of Academic Subjects 2022.
69. QS World University Ranking by Subject 2022.
70. Global Ranking of Sport Science Schools and Departments 2021.
71. Shanghai Ranking, Global Ranking of Academic Subjects 2022.
72. Ibid.
73. Times Higher Education World University Rankings by Subject 2022.
74. Shanghai Ranking, Global Ranking of Academic Subjects 2022.



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