



Australian Government

AUSTRALIAN STRATEGY FOR INTERNATIONAL EDUCATION

2021-2030



Connected, creative and caring education

The Australian Government acknowledges the Traditional Owners and Custodians of Country throughout Australia and acknowledges their continuing connection to land, water and community. We pay our respects to them, their Elders past, present and emerging, and the continuation of cultural, spiritual and educational practices of Aboriginal and Torres Strait Islander peoples.

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MINISTER'S FOREWORD

International education is one of Australia's great success stories. We have educated more than three million international students in the past 20 years. These graduates have gone on to lead and shape politics, businesses and societies across the globe. Many have become citizens making an important contribution to Australia.



International education connects Australia with the world. It also delivers better education outcomes for our own domestic students, and contributes to the national economy, with international education earning \$40.3 billion and supporting around 250,000 Australian jobs in 2019, prior to the pandemic.

The past 20 months have been extremely challenging for the international education sector. I recognise the patience and perseverance of both international education providers and international students over the course of the pandemic. The sector was hard hit. However, with the announcement of borders reopening to fully vaccinated international students, I am optimistic about the rebound of the sector and look forward to seeing international students onshore.

Australia is known for exceptionally high-quality education, for the lifestyle we can offer and for our friendliness and culture. However, the COVID-19 pandemic exposed a number of broader challenges for the sector. We need to do things differently as we rebuild to make the sector more sustainable, to create new opportunities for growth and to enhance the experience of domestic and international students.

To support this, the *Australian Strategy for International Education 2021-2030* (the Strategy) sets a new direction for international education for the next ten years.

The Strategy will be backed by more than \$37 million in targeted support measures, including regulatory fee relief and an Innovation Development Fund for English language providers.

As international student numbers increase, we need to have a greater diversity of students coming into Australia. This is particularly important for our public institutions who serve broad mandates in delivering education. Australia's international education sector is fortunate to attract high numbers of students from a small number of countries. These students are welcome members of our community, but such concentration presents significant financial risk to individual providers and to the sector more broadly. Importantly, an optimal make-up of international student cohorts also enhances the learning experience of Australian students, a key objective of international education. The government will work with the sector, particularly public institutions, on strategies to encourage an optimal make-up of international student cohorts.

Through increasing the diversity of courses in which international students enrol, there are opportunities for a stronger alignment between international education and Australian skills needs. The National Skills Commission has identified skills needs in emerging fields that will drive our growth in the future. These include data and digital specialists, the health profession and engineers. However, currently almost half of international enrolments at universities are concentrated in business and management. Australia has much to offer international students who enrol in these skills shortage areas, who can then make a greater contribution to Australia's workforce.

While we have traditionally done well in the number of students who have come to Australia for full-time study, there is an opportunity for further growth of our international student market by expanding our high-quality education offerings to online and offshore markets.

This could be in different delivery models at different price points to reach a much broader range of students. Through the Strategy, the government is committed to working with the sector, including ensuring that legislative and policy frameworks support such diversification and growth.

I thank the Expert Members of the Council for International Education for their work in leading consultations on this Strategy. The government received more than 120 written submissions and consulted more than 1,600 stakeholders. Ongoing collaboration between the government, the sector and other stakeholders contributing to international education will be central to successful implementation of the Strategy.

Together, we will move from recovery into long-term growth and support a *Connected, Creative and Caring* international education for all students studying with Australia.

The Hon Alan Tudge MP

Minister for Education and Youth
Chair, Council for International Education



INTRODUCTION

International education connects Australia with the world, builds meaningful people-to-people links and supports Australia's position in our region. Australia attracts students from over 190 countries, who bring their collective diversity and knowledge to our education institutions, workplaces and communities. This helps Australians to prepare for opportunities in an increasingly globalised world and contributes to an inclusive and prosperous Australia.

International education is a key contributor to the Australian economy. However, the importance of international education goes beyond its economic benefits. It facilitates meaningful cross-cultural exchanges, creates influential alumni networks and provides residency pathways for highly skilled graduates.

Australia's strengths in international education – our world-class education system and institutions, liveable cities, multicultural society, student protection mechanisms and strong graduate outcomes – remain strong incentives for students seeking an international education. Australia consistently ranks among the most popular study destinations for international students.

Australia's international education comprises all levels of the education system:



Schools



English Language
Intensive Courses for
Overseas Students



Vocational
Education and
Training (VET)



Higher Education

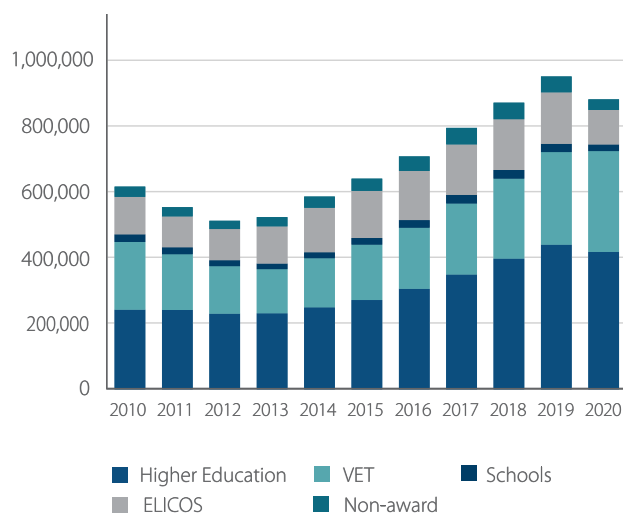


Research

Why now for a new Strategy?

Since its release in 2016, good progress has been made on Australia's first international education strategy, the *National Strategy for International Education 2025*. International education has increased its vital role in Australia's social, cultural and economic prosperity, generating almost a quarter of a trillion dollars for the Australian economy over the last ten years. In 2015, it contributed \$19 billion to the Australian economy and by 2019, this had almost doubled to \$40.3 billion. This made international education Australia's largest services export and fourth largest export sector overall. International students and their visiting family and friends also make a key contribution to the visitor economy, creating further employment and economic opportunities.

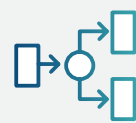
Figure 1: International student enrolments by sector, YTD 2010-2020



However, COVID-19 significantly affected Australia's international education sector in 2020 and continues to present challenges. Australian institutions have faced a decline in enrolments and onshore student numbers that may continue for some years. A new Strategy for the post-COVID world will support the sector to recover and grow sustainably.

The pandemic is not the only reason for a new strategy. Innovations in education delivery, changing bilateral relationships with key partner countries and risks to the sector's sustainability were already transforming the way international education was delivered. The effects of COVID-19 have accelerated many of these challenges and highlighted the need to embrace new ways of engaging with students locally and overseas for Australia to remain globally competitive.

As the sector recovers, it is important that things are done differently to make the sector more sustainable, create new opportunities for growth and enhance the experience of domestic and international students. Diversification will be central to these objectives. As the international education landscape continues to evolve, the Strategy will position the sector to be responsive across four priorities and strengthen Australia's position as a world leader in international education.



Diversification



Meeting Australia's skills needs



Students at the centre



Growth and global competitiveness

The Strategy is the result of an extensive consultation process, led by the Expert Members of the Council for International Education. Over 120 written submissions and 1,600 stakeholders participated, representing students, peak bodies, education providers, business, community groups and state and territory governments. These consultations emphasised the need to ensure a *Connected, Creative and Caring* international education experience for all students studying with Australia.



ROADMAP TO RECOVERY

The COVID-19 pandemic has severely disrupted international education. Border closures have seen student enrolments fall by up to 70 per cent on pre-pandemic levels for some parts of the sector. The absence of international students has also been felt keenly in communities and on campuses around Australia. However, with the support of Commonwealth, state and territory governments, the sector has worked hard to maintain business and pedagogical continuity under unfamiliar circumstances. Together, government and industry have continued to make substantial efforts to meet the full spectrum of student needs and expectations, both onshore and offshore.

The Australian Government has also provided considerable financial support to the sector during COVID-19 to keep businesses afloat and capacity in the system so that when students return, Australian providers can bounce back quickly.

This support began almost immediately after the pandemic was declared and has continued since. In April 2021, the Government announced a \$53.6 million targeted support package for international education providers hardest hit by COVID-19. These measures encouraged providers to refocus their business models on Australian students and expand online and offshore course offerings.

Furthermore, the Australian Government has granted student visas lodged overseas, waived the application fee for students to lodge another application if unable to complete their studies within their original visa, and has made it possible for students to count online study completed outside Australia towards a post-study work visa.

The reopening of borders, the prioritisation of international students under the *National Plan to Transition Australia's National COVID-19 Response* (the National Plan) and vaccine recognition will drive sector recovery in 2022.

To support providers through the recovery period, the Government will extend regulatory fee relief to education providers from 1 January 2022 for up to twelve months, depending on their sector. A new Innovation Development Fund will also provide short-term targeted support to providers who have been most affected by Australia's border closures, to support them to diversify their education offerings into online and offshore delivery. The new program complements and builds on the fully subscribed Innovation Fund announced as part of the support package in April 2021.

This work will be complemented by ongoing promotion that will position Australia to retain market share and build student awareness and preference for a 'Study with Australia' experience.

Coordination by governments, providers and industry will be needed to deliver a strong return for this important sector.

Support through border closures

Prioritisation of international students through all phases of the National Plan.

Alternative quarantine and vaccination arrangements where international students can be accommodated to support safe returns to Australia.

Communication with international students outside Australia to provide clarity to students on Australia's arrangements.

Student and graduate visa settings to support the return of international students.

Targeted regulatory relief for providers and further financial support.

Targeted promotion of Australian education.

Targeted support for at-risk providers.

Flexibility for international students in Australia to work beyond 40 hours per fortnight if they are employed in selected industries.

Flexibility for students offshore while borders were closed, including ongoing eligibility for a Temporary Graduate Visa.



SETTING PRIORITIES FOR THE NEXT 10 YEARS

1. Diversification

The COVID-19 pandemic demonstrated that dependence on a small number of markets is not sustainable. As the sector recovers, a new approach is needed to make the sector more resilient, to create new opportunities for growth and to support an optimal student experience. Diversification of student cohorts and course offerings will be central to achieving these objectives.

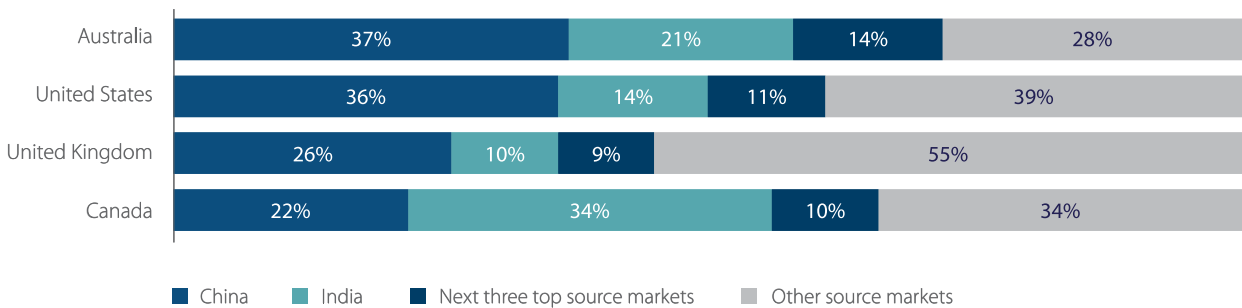
Diversification mitigates against market shocks and supports providers to actively manage risk. A greater diversity of student cohorts also supports a better learning experience for domestic and international students. Through diversification, there is an opportunity for further growth of Australia's international student market by expanding our high-quality education offerings to online and offshore markets at different price points. International education can also play a further role in supporting Australia's economy, by diversifying courses in which students enrol in line with Australia's skills needs. As a key priority for the next ten years, the Australian Government will work with the sector, particularly public institutions with a broad mandate, to identify strategies to drive diversification.

Diversifying student cohorts and source countries

Achieving an optimal mix of student cohorts and source countries has benefits for the sector more broadly. However, it is particularly important for higher education where the top five markets in Australian universities accounted for 72 per cent of enrolments in 2020. This is a significant increase in concentration relative to 2010, where the top five markets accounted for 60 per cent.

In key competitor markets, such as the United States, the United Kingdom and Canada, diversification is increasingly a strategy for supporting sustainable growth in international education enrolments. Like Australia, students choose these markets from a breadth of destinations, with strong demand for international education globally from Chinese and Indian students. Australia will continue to cultivate strong relationships with key partner countries, including India and China, as they remain valued partners in international education. Australia is also well positioned to help meet their growing education needs. However, the government is committed to working with the sector to identify optimal strategies to diversify the student cohort.

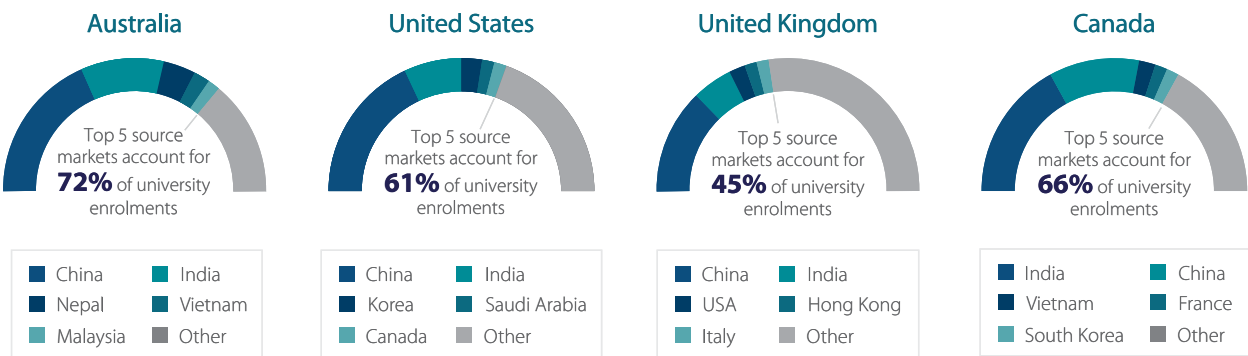
Figure 2: Concentration of enrolments in competitor markets across all sectors, by country of origin, 2020



A diverse student cohort is part of a uniquely Australian student experience and is key to the success of Australia’s universities. A diverse campus exposes both domestic and international students to different ways of thinking and learning, ensures freedom of speech and expression, and provides students and the communities they live with the skills to communicate and interact with people and societies from all backgrounds.

An international classroom and campus can foster greater cultural awareness and enable long-term global partnerships at the student, community and provider level. A lack of diversity in international student cohorts exposes providers to financial risks if there are market disruptions or if one market declines suddenly.

Figure 3: International onshore enrolments in tertiary education by student source market, 2020



The diversity of student cohorts can be considered at a range of different levels – including at the sector, institution, campus or location, field of education, course or classroom level. At each of these levels, there may be an opportunity to improve the student experience through policy incentives which encourage greater diversification. The Australian Government will work with the sector to develop guidelines and other initiatives to drive better diversity of international students and facilitate an optimal student mix with a particular focus on Australia’s public universities.

Action:

1.1 Diversifying student cohorts and source countries

A. The Australian Government will drive better diversity of international students to improve sector resilience and student experience, with a particular focus on Australia’s public universities.

Diversifying offerings to capitalise on digital and offshore opportunities

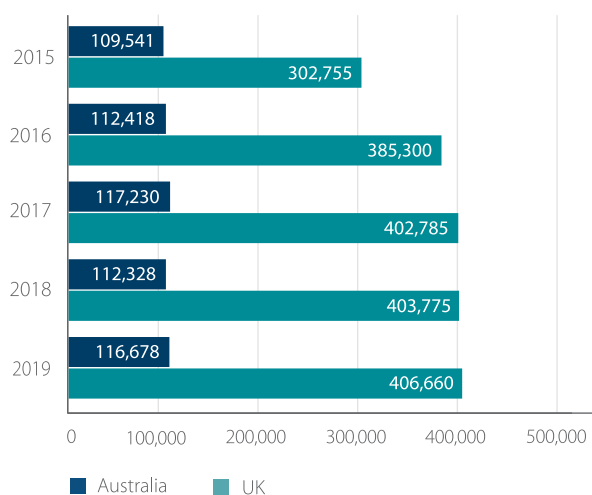
Australia has traditionally performed well in the number of students onshore, with 80 per cent of international students studying onshore and in-person in 2019. However, there is an opportunity to grow our international student market by expanding our high-quality education offerings to offshore and online markets.

In recent years, the sector has seen rapid adaptation, growth and innovation in online delivery. The global online e-learning market is predicted to grow from US\$200 billion to more than US\$370 billion by 2026. This growth is driven by students around the world who are unable to afford a premium in-country experience and looking for more affordable and flexible options. The rise of digital and online education, micro-credentials and transnational education (TNE) allows students to tailor their education experiences to their preferred location and style of learning. Hybrid models can also help to meet skills needs and education ambitions in partner countries, while developing strong knowledge partnerships which benefit Australia's bilateral relationships.

Offshore offerings

Transnational Education (TNE) has the potential to reach larger cohorts of learners than the traditional model of intensive onshore education. Pre-pandemic, key competitor countries had a significantly larger portion of international students studying offshore compared to Australia. In 2019, the United Kingdom had 406,660 international student enrolments in higher education TNE compared to Australia with 116,678. However, since the pandemic, thousands of international students have continued their studies offshore or even enrolled in new courses with Australian providers offshore.

Figure 4: International student enrolments in higher education transnational education Australia and UK, 2015-2019

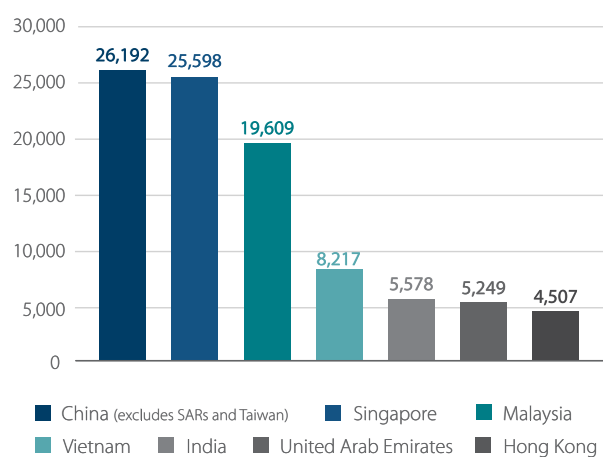


Australia is already a leader in TNE, particularly international branch campuses (IBCs). For example, Australia's Monash University established an international branch campus in Indonesia, the first to do so by a foreign provider. This demonstrates the immense appetite for offshore in-country provision of Australian education.

There are more opportunities for Australian providers to work with offshore partners, to varying scales, to reach new and emerging markets in our region and across the world. This is facilitated by close government to government collaboration, including through the work of Australia's international network of Education and Research Counsellors.

Australia's experience expanding into offshore markets to date highlights the importance of the Government and the sector working together to support new models and partnerships as they emerge. In support of this, the Government will continue work to achieve better recognition of the benefits of education services and products delivered offshore. This will expand the delivery of Australian qualifications and non-Australian Qualifications Framework training offshore through overseas branch campuses, partnerships with offshore institutions and online offerings from Australian education and skills providers.

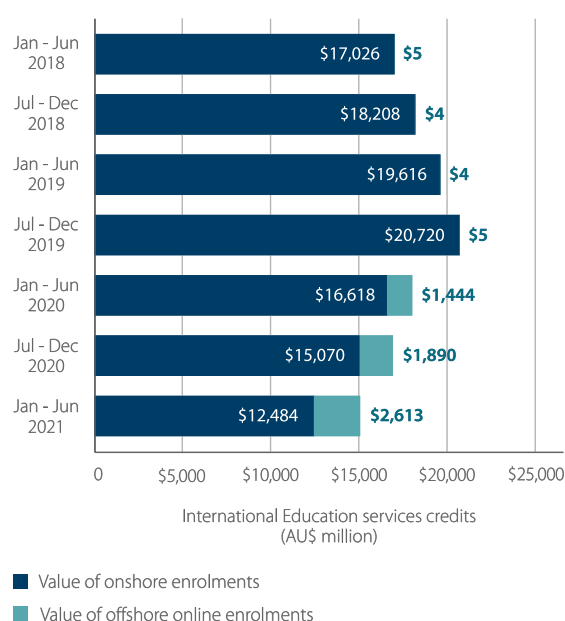
Figure 5: Offshore Higher Education enrolments of Australian providers by top seven markets, including enrolment by distance, on campus and multi-modal, 2019



Digital offerings

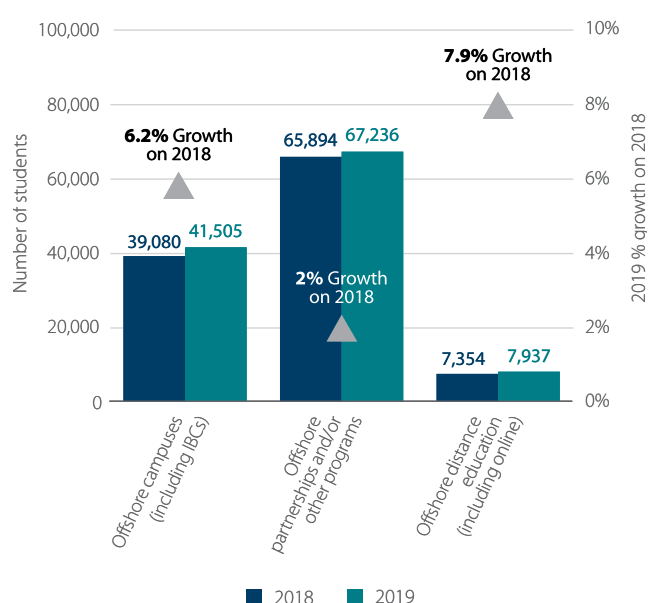
Currently, Australia's online international education footprint is relatively small at 22 per cent of our higher education students, while competitor nations, such as the United Kingdom, reach double that. In fact, online delivery only accounts for 6.8 per cent of transnational education enrolments in tertiary courses, while the remaining 93.2 per cent account for in-country offshore delivery. However, over the last 18 months, the international education sector has quickly pivoted to wide-scale, quality online delivery to student visa holders unable to enter Australia due to international travel restrictions and to those in Australia unable to enter classrooms due to public health orders.

Figure 6: International education services value onshore and offshore online enrolments (AU\$ million), January 2018 – June 2021¹



It is timely to capitalise on these learnings and growth in digital offerings to position Australian education to cohorts of young people who are coming of age in an increasingly digital environment and have familiarity and appetite with digital service delivery. Expanding online study also creates a pathway option for international students to transition to further online or onshore study thereby leveraging significant future investment in the Australian economy.

Figure 7: Higher education delivery to offshore students and year on year growth, 2018 & 2019



Digital offerings must be positioned to complement onshore and hybrid delivery models offshore. Successful online education also requires a shift in the entire student experience. Innovative pedagogy and innovative technology must be interwoven. The Australian Government's recent 'Study with Australia' campaign attracted over 836,000 enrolments to study free online courses administered by Australian providers, demonstrating the possibilities for study 'with' Australia to complement study in Australia. Many Australian providers have also adapted their practices to better support students studying online, for example, through study hubs.

¹ Australian Bureau of Statistics, International Trade in Goods and Services, Australia, August 2021, <https://www.abs.gov.au/statistics/economy/international-trade/international-trade-goods-and-services-australia/aug-2021/>

To support this expansion, the Australian Government will continue to address non-tariff barriers that limit the recognition of Australian qualifications delivered online in various offshore and online markets. Sustained international co-operation efforts will highlight Australia's robust standards for quality assured online education, including sharing expertise in the regulation of online education, and facilitating providers to share frameworks and methodologies utilised to deliver world-class digital courses. Advocacy will also include encouraging countries to ratify the *Tokyo Convention* and the *Global Conventions on the Recognition of Qualifications* and improving the recognition of Australia's qualifications.

Action:

1.2 Diversifying offerings to capitalise on digital and offshore opportunities

- A. The Australian Government will grow and diversify Australia's offshore and online delivery to international students.





2. Meeting Australia's skills needs

International students have always been an important source of labour for Australia, both while they are studying and through post-study work rights, as well as becoming entrepreneurs and employers themselves. A stronger alignment between Australian skills needs and courses in which international students enrol will support our businesses, industries and economy. The National Skills Commission has identified Australia's skills needs in emerging fields that will drive our growth in the future. These include data and digital specialists, health professions and engineers, especially those in energy; fields well aligned to Australia's strengths. Greater efforts by the sector to align international students to courses meeting Australian skills needs can also have workforce benefits, increasing the pool of skilled workers, some of whom may go on a pathway to become citizens.

Research collaboration, micro-credentials and other short courses will be increasingly relevant into the future and provide opportunities for government to work with the sector to expand into new markets and meet evolving skills needs. Furthermore, sharing our technical expertise in education and assisting partner countries to develop training systems aligned with Australian industry needs supports economic growth and productivity in our region.

Delivering international education that meets Australia's skills needs

Transforming the way Australia delivers skills-aligned international education

Australia's workforce is evolving, and the skill requirements needed are also changing. International education is rapidly innovating to anticipate and meet these changes. Skills development and lifelong learning will be key as some jobs change, new jobs emerge, and technological progress continues. Currently almost half of Australia's international enrolments at universities are concentrated in business and commerce, an attractive education offering and key area of strength for Australia's international education sector. However, Australia's share of international student enrolments in other key academic and skills areas, including engineering, maths, technology and health-related offerings, face significantly lower shares than the OECD average.

A key challenge is how to incentivise international students to study in areas of skills needs, an issue also being considered by our international education competitors. Better aligning program choices with priority employment fields will deliver more job-ready graduates in the disciplines and regions where they are most needed. A more diverse range of qualification levels and study concentrations will also encourage students to

study at a range of institutions beyond traditional choices of management, commerce and information technology courses undertaken in major capital cities.

Targeted career initiatives may also help incentivise uptake in areas of skills needs among interested temporary graduate visa holders entering Australia and to returning and new international students. The Australian Government's Services Exports Action Plan underlines that Australia's international competitiveness is contingent on the skills and qualifications of the Australian workforce. International education can help to bridge these gaps. With strong English language skills and Australian qualifications, international graduates are well-positioned to fill skills gaps and apply for residential and employment pathways, including through the Skilled Migration Program.

Micro-credentials and short courses will be increasingly relevant into the future and provide opportunities for government to work with the sector to expand into new markets and meet evolving skills needs in a timely way for students. Students who are unable to commit to longer courses may be interested in a quality Australian education in an area of priority.

International Skills Training (IST)

The Australian Government's International Skills Training (IST) course program allows for Australian Registered Training Organisations to apply to the Australian Government for a licence to deliver the IST courses in training and assessment for delivery offshore. IST courses provide business opportunities and build the capacity of key overseas partners. Between 2017 and 2020, 3051 international students successfully completed IST courses. Further work includes a broadening of IST courses to reach more countries which need relevant in-country course offerings. This will further support global human resource development in priority workforce skills needs areas. The priority courses identified for the expansion include cybersecurity, engineering, transport and logistics, tourism/hospitality, retail/wholesale and health-related areas. Countries and regions where these courses hold peak interest for delivery include Indonesia, Malaysia, Vietnam, India, Colombia, Brazil, Mexico and South Korea.

Work Integrated Learning (WIL) also provides students with practical experience relevant to their course of study, including internships, placements and projects, and prepares students with the skills required to participate in the global workforce following their studies.

Action:

2.1 International education that meets Australia's skills needs

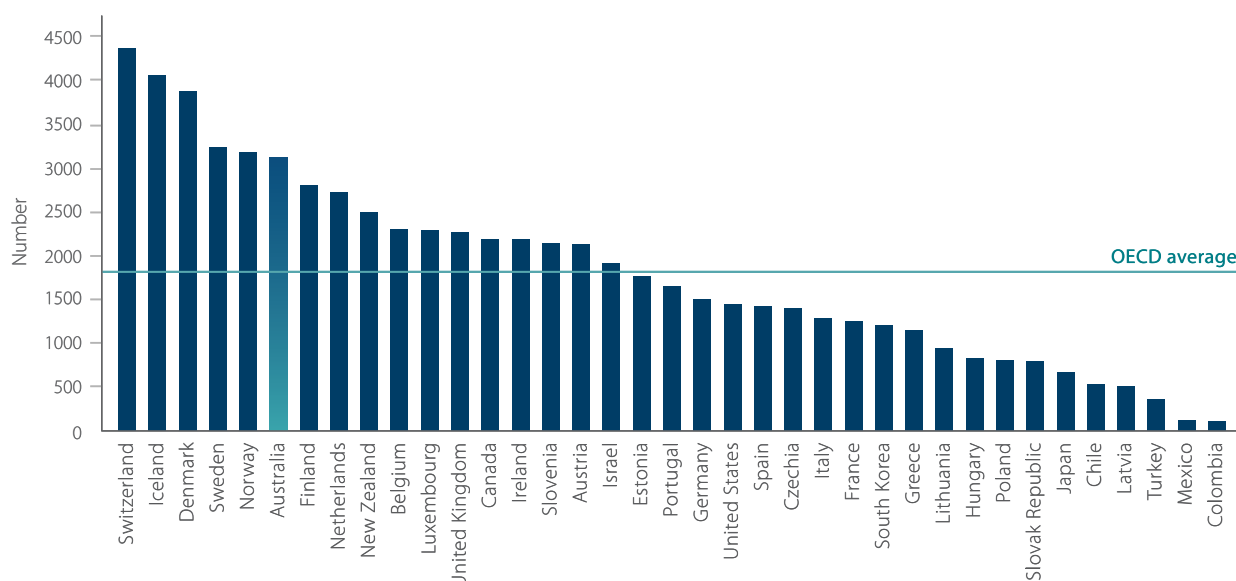
- A.** To align educational offerings with employment opportunities, the Australian Government will improve education providers' understanding of Australia's future skills needs.
- B.** The Australian Government will expand opportunities for non-Australian Qualifications Framework courses to be delivered offshore particularly in areas of future skills needs.

Fostering quality partnerships for research and collaboration

Research plays a clear role in driving new skills needs. When conducted in a safe and trusted way, international research collaboration reflects and enhances Australia's national interests and addresses global challenges. International research collaborations also expand Australia's access to funding, facilities, and expertise, with research students also providing Australia with an important talent pipeline for our highly skilled workforces. 82 per cent of research projects funded through the Australian Research Council's *National Competitive Grants Program* in 2020-21 involved some form of international collaboration, highlighting the importance of providing global research leadership.

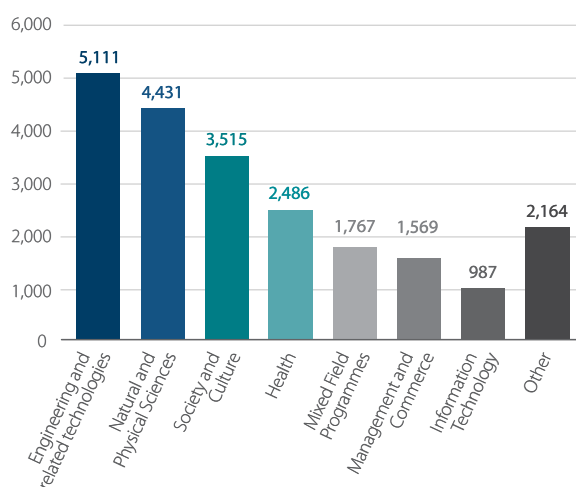
Australia's research system has a strong global reputation, with almost 90 per cent of research rated at or above world standard. With only 0.3 per cent of the world's population, Australia contributes 4 per cent of global research publications, ranking 6th out of 31 OECD countries in terms of scientific publications per million population, demonstrating Australia's research efficiency.

Figure 8: Scientific publications per million population compared to OECD average, 2020



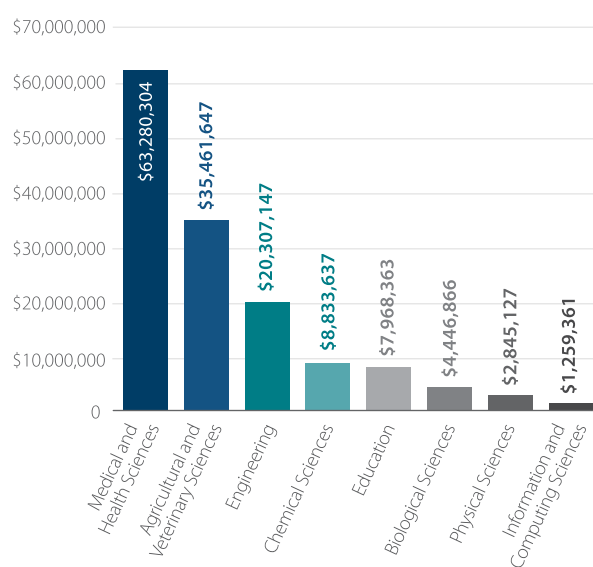
While Australia's research performance is world-class, there are opportunities to better leverage our strengths to increase impact. While international student enrolments in Masters Degree by Coursework has seen significant growth, Masters Degree by Research and Doctoral programs have seen a smaller yet steady increase in recent years. Diversification of research fields and attracting students to study and conduct research in different areas of research are also paramount. Australia can further target international research students in key fields and disciplines to align more closely with Australia's economic priorities and skilled workforce needs. Access to globally in-demand skills such as artificial intelligence, quantum computing and digitisation is essential to Australia's economic prosperity.

Figure 9: Enrolments of international students in Masters Degree by Research and Doctoral Degree programs by broad field of education, 2020



More can be done to translate and commercialise Australia's quality research into new products and innovations. The Australian Government is reviewing how to enhance the connection between universities and industry. To fully realise the economic and strategic benefits of international research collaboration, Australia needs to grow research engagement with industry partners globally. Expanding our research partner countries will lead to commercialisation and exchange which drives a stronger and more diverse market.

Figure 10: Research commercialisation income (\$AUD), 2014 – 2016²



² Australian Research Council (2019), [State of Australian University Research 2018-19: ERA National Report](#), accessed 19 October 2021

Research integrity

It is essential that universities, the community and government have confidence that proportionate strategies are in place to manage and mitigate the foreign interference risks to Australia's university students, staff and research. Equally, international partners are seeking assurances when working together on sensitive topics. Australia's leadership in developing principles of research integrity in multilateral fora demonstrates our expertise and helps to foster strong international partnerships. This keeps Australia at the forefront of countering foreign interference in education and research and also influences partner countries' approaches, facilitating trusted partnerships for future research and education collaboration

The work of the University Foreign Interference Taskforce (UFIT)

Updated Guidelines to Counter Foreign Interference in the Australian University Sector (Guidelines) were released on 17 November 2021. The Guidelines respond to the evolving threat of foreign interference and are seen by other countries as an example of best practice collaboration between the sector and government to counter security threats.

The Guidelines help better protect all Australian university staff and students from risks of foreign interference by providing them with the principles and resources to address and proactively mitigate instances of foreign interference that may arise in their university work and research. This is consistent with Australia's approach to countering foreign interference, which aims to increase the cost and reduce the benefit to those conducting foreign interference in Australia.

The Guidelines acknowledge and complement other Australian Government initiatives to strengthen transparency and safeguard Australia's international collaboration, including the *Foreign Influence Transparency Scheme*, the *Foreign Arrangements Scheme*, the *Defence Trade Controls Act* and reforms to protect Australia's critical infrastructure.

Action:

2.2 Setting high-quality partnerships for research and collaboration, fostering innovation and Australia's growth that meets skills needs

- A. The sector and the Australian Government will build sector capability, so Australia continues to be an attractive, secure and trusted international research collaboration partner.

3. Students at the centre

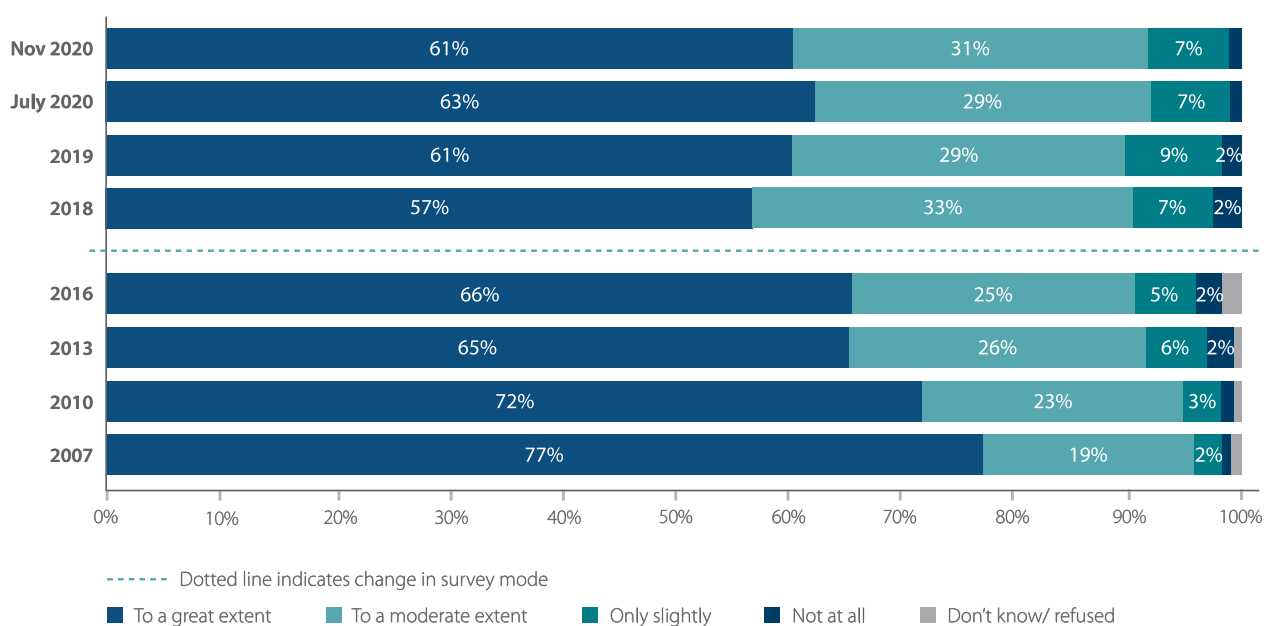
Australia's global reputation as a study destination of choice rests on our ability to provide a world-class experience for domestic and international students, regardless of their location and mode of study. Building strong people-to-people links through international education also enhances Australia's role in our region and strengthens our connections with the world. Outbound experiences embarked on by Australian students support them for a globalised and interconnected future. Australian students benefit from the experience of having international students study alongside them. The right classroom mix can improve the learning experience for both Australian and international students. This comes when there are different cultures and perspectives in classrooms and campuses, which builds the intercultural understanding of Australian students and prepares them to enter a globalised workforce. International students also make a significant contribution to local communities, building intercultural understanding.

Strengthening connections between international students and Australian students and communities

Feeling welcomed, valued, and included in Australia is an important part of the student experience. Ensuring international students build connections with Australian communities and values, and empowering local communities to support those connections, will establish closer people-to-people links with our region.

Overall, surveys indicate that international students are satisfied with their experience of studying and living in Australia. However, the effects of COVID-19 have highlighted the importance of improving social cohesion, with some international students reporting feelings of social isolation or increased levels of discrimination.

Figure 11: Survey results to the question “To what extent do you have a sense of belonging in Australia?”, 2007-16 & 2018-20



Creating a sense of belonging provides one of the foundational aspects of a student's wellbeing while studying in Australia. Connecting students to local community groups and with each other improves interculturalism and allows education providers to champion social cohesion.

Enriching experiences off campus, including internships, employer networks and graduate opportunities, are critical elements to the international student experience. Identifying and delivering extra-curricular opportunities that help international students make the most of their Australian education will also give them a more rounded experience and support peer-to-peer links. The Australian Government will continue work with industry to support international students to make meaningful connections with domestic students and beyond their campuses into their local communities.

Action:

3.1 Strengthening connections between international students and Australian students and communities

- A. The Australian Government will work with the sector to support student linkages beyond the confines of the campus and into local communities.
- B. The international education sector will enhance domestic and international student linkages.

Enhancing people-to-people links through international education mobility

More than three million international students have studied in Australia over the last fifty years. Australian-educated alumni and their families now hold influential positions in academia, government and business throughout the world. Alumni become ambassadors for Australian education and for Australia more broadly, strengthening Australia's reputation and promoting the benefits of Australian international education to prospective students and businesses. Through these deep relationships Australia can continue education and research exchanges in areas of mutual benefit, strengthening our many successful partnerships across the Indo-Pacific and the world.

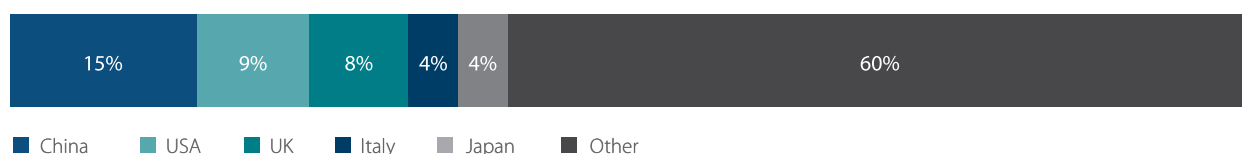


Connecting Australian students with the world

Australian students also benefit from international learning experiences abroad. By embarking on outbound mobility, for example through study, work placements and cultural or sporting exchanges, Australian students are exposed to different cultures and experiences adding to a holistic global education experience that prepares them for an interconnected future. Globally connected students and graduates allow Australia to reach diverse audiences at home and abroad by helping our active trading nation to collaborate with customers and partners around the world.

To support learning abroad, the Australian Government will continue to support partnerships and programs that build relationships between our education providers and students internationally, as many have done through the New Colombo Plan and other initiatives. Over 63,000 students have been supported through New Colombo Plan scholarships and mobility grants since 2014.

Figure 12: Outbound Australian Student Mobility, 2019



Action:

3.2 Enhancing people-to-people links through international education mobility

- A. The Australian Government and the sector will support offshore mobility for Australian students via mechanisms such as joint partnerships with international institutions.
- B. The Australian Government and the sector will continue to capitalise on the potential of Australia's alumni networks to promote Australia and advance national interests, especially in the Indo-Pacific.

Student experience and wellbeing

Each year, the Student Experience Survey (SES), funded by the Australian Government as part of the Quality Indicators for Learning and Teaching (QILT) Program, reveals the rates of international student satisfaction with various elements of the Australian study experience. Apart from a dip in 2020 due to the COVID-19 pandemic, satisfaction rates have been consistently high over the past decade. Prior to the pandemic, 75 per cent of international students rated the quality of their entire educational experience positively. Despite the pandemic, onshore international students reported a higher degree of satisfaction with their living experience in 2020, with 91 per cent giving a positive rating to their overall living experience in Australia.

Figure 13: Onshore international undergraduate student overall education experience satisfaction (% positive rating)

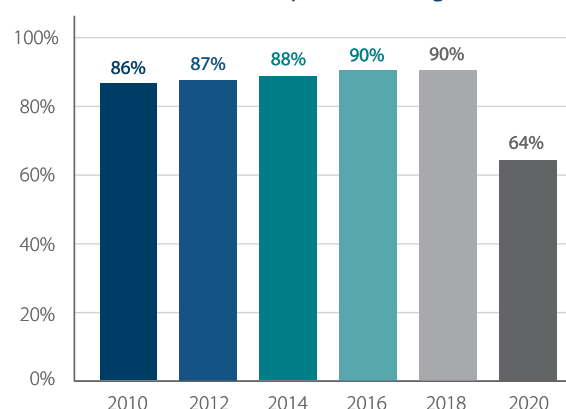
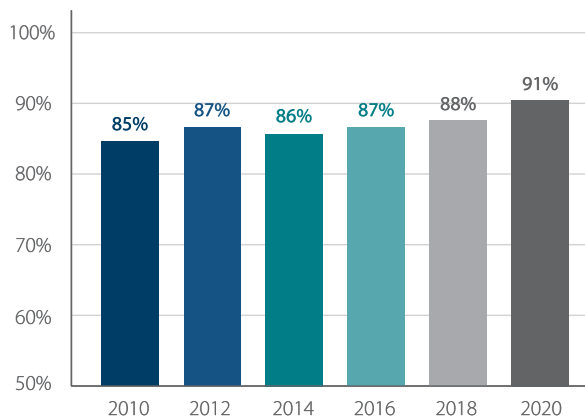


Figure 14: Onshore international undergraduate overall student accommodation experience (% positive rating)



International students are consistently identified as being vulnerable to developing mental health and wellbeing issues. The Australian Government Productivity Commission's 2020 inquiry report into mental health identified mental ill-health as prevalent among international students and that accountability of tertiary education providers should be strengthened with expanded mental health support to their students, including international students. In particular, the report recommended that tertiary education institutions ensure counselling services are able to meet the language and cultural diversity needs of their international students.³

Education and training providers are also well placed to support students to understand their rights and responsibilities, through inductions and throughout their studies. Under Australia's *Education Services for Overseas Students* (ESOS) legislative framework, ensuring student wellbeing is a responsibility of education institutions, including taking all reasonable steps to provide a safe environment on campus and informing students of support services to assist them in adjusting to study and life in Australia. Education institutions also play an important role in helping to resolve issues as they arise and managing critical incidents that significantly impact on student safety and wellbeing.

The quality of students' living and work arrangements is also strongly linked to their wellbeing and experience. Positive accommodation and work experiences contribute to building social networks and enhance students' sense of security. However, international students have at times been the subject of exploitation and discrimination in their homes and workplaces and may not have knowledge of complaints handling mechanisms or legal redress regarding poor accommodation situations or working conditions and rights.

The Australian Government works closely with the Fair Work Ombudsman, state and territory governments, the international education sector and the Council for International Students in Australia to combat workplace exploitation and promote communication resources. The Australian Government is working with the Fair Work Ombudsman to require registered providers give students information on services they can access for information on their employment rights and conditions, and how to resolve workplace issues, following the amendment of the *National Code of Practice for Providers of Education and Training to Overseas Students* in 2018. To inform further actions, the Government continues to build on its repository of data on migrant worker exploitation and experience, including the experiences of international student visa holders working in Australia.

Action:

3.3 Student experience and wellbeing

- A. The Australian Government will work with the sector and state and territory governments to enhance students' awareness of their rights and responsibilities while living, working and studying in Australia, and support the capability of all providers to deliver student support programs.
- B. The Australian Government will maintain student representation on the Council for International Education to ensure the voices and experiences of international students continue to inform relevant policies.

³ Productivity Commission (2020) [Mental Health, Inquiry Report](#), accessed 21 September 2021.



4. Growth and global competitiveness

To ensure the sector remains competitive into the future, the legislative and policy frameworks which underpin international education must support diversification and growth. This starts with a targeted review of the *Education Services for Overseas Students Act 2000* (ESOS Act) to examine how the ESOS regulatory framework can support the Strategy's implementation, while also continuing to protect Australia's reputation for providing a quality education. Setting the global standard and driving continuous improvement in Australia's education and research system, including through advocacy and qualifications recognition, will also secure Australia's reputation as a leader in international education.

Maintaining a strong quality framework to ensure continued growth

Australian education courses at all education levels are subject to rigorous quality assurance and regulation. *The Education Services for Overseas Students Act 2000* (ESOS Act) and its related legislation has a specific focus to protect and enhance Australia's reputation for quality education, provide tuition protection and support the integrity of the student visa program. The ESOS Act establishes the regulated requirements and standards for education and training providers offering Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS) registered courses to Student visa holders. The ESOS legislative framework also establishes the Tuition Protection Service which provides tuition fee protection for international students studying a CRICOS registered course.

To ensure the sector remains competitive into the future, the legislative and policy frameworks which underpin international education must also support diversification and growth. The Australian Government will undertake a targeted review to examine how the ESOS Act regulatory framework can support the Strategy's implementation, while also continuing to protect Australia's reputation for providing a quality education.

Furthermore, with quality data, the international education industry can self-direct innovation and target diverse areas of opportunity. With the right data, industry will have an evidence base to address student demand and identify opportunities to drive expansion and diversification. Enhanced data capture, which matches expansion into new markets, products and delivery, will enable the sector and the Government to assess progress.

Action:

4.1 Maintaining a strong quality framework to ensure continued growth

- A. The Australian Government will provide a package of support measures including \$27.8 million in fee relief from regulatory charges in 2022, including certain fees for Australian Skills Quality Authority (ASQA), Tertiary Education Quality and Standards Agency (TEQSA), Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS) registrations and the Tuition Protection Service (TPS) Levy.
- B. The Australian Government will conduct a review of the ESOS Act and the National Code, with a view to ensuring this legislation continues to support:
 - i. innovation within the sector
 - ii. high quality education provision online and offshore
 - iii. an optimal experience for all students.
- C. The Australian Government will work to improve data systems to reduce administrative burden on providers and increase data availability.

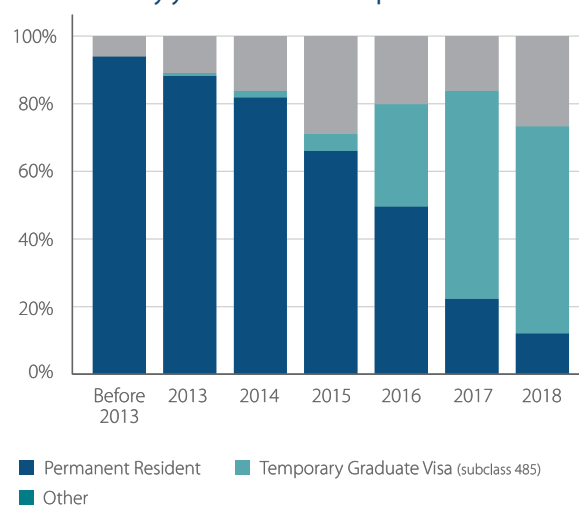
Ensuring global competitiveness

Maintaining competitiveness through visa settings

Eligibility for work rights and potential pathways to residency and employment are important considerations that motivate globally mobile students. Work rights also supplement the main purpose of study in Australia by giving students an opportunity to gain Australian work experience. Australia's Student and Temporary Graduate Visa Programs currently provide for the temporary stay of international students and graduates and are administered by the Department of Home Affairs.

Throughout the pandemic, the Australian Government has ensured flexibility in relation to visa conditions, including eligibility requirements for visas which offer post-study work rights. As borders reopen, approximately 145,000 students outside Australia already hold primary student visas and will be able to plan to study onshore. Ongoing flexibility in Australia's migration policies will be an important part of enhancing Australia's competitive position overseas. There is a need to better target international enrolments towards Australia's future skills needs to grow businesses, create more local jobs and aid our economic recovery.

Figure 15: Type of visa held by international graduates currently working in Australia by year of course completion



Australia should seek to attract new cohorts of students who may not wish or be able to travel to Australia but want to benefit from an Australian education as well as post-study work opportunities in Australia. This is increasingly important as students seek industry-relevant training to navigate a competitive labour market in their home countries. To support the sustainable recovery and growth of the international education sector, the Australian Government will work with the sector to ensure visa settings continue to support diversification and growth.

Expanding growth by setting the standard

Australia maintains strong relationships with international partners across the world. Australia's overseas networks based across Europe, Latin America, North, South and Southeast Asia, build confidence in the quality of Australian education and support new and existing partnerships.

Bilateral government-to-government engagement is complemented by participation in multilateral fora, including the G20, Asia Pacific Economic Cooperation (APEC), United Nations Educational, Scientific and Cultural Organization (UNESCO), and Association of Southeast Asian Nations (ASEAN). Continuing this strong engagement with partner countries on education, training and research will be vital in diversifying Australia's student cohorts, types of courses and modes of delivery. Australia has always been innovative in developing flexible pathways for domestic and international students to enter study.

The Australian Government will continue to work with overseas governments and institutional networks to leverage joint partnerships with offshore institutions and study centres to develop a stronger in-country presence in partner countries and their economies. The Australian Government regularly reviews the location of offshore staff to ensure Australia is best placed to capitalise on emerging opportunities, as demonstrated by the expansion of Australia's network in Latin America.

Australia's leadership in developing regional and global qualifications recognition architecture is a key part of the education ecosystem, seeking to optimise the benefits of internationalisation while maintaining Australia's rigorous education standards. Australia's long history in the field of qualifications recognition allows us to occupy a unique and influential position in the world, as a leader of best practice, and to enhance recognition system complementarity.

Recognition of qualifications is a fundamental enabler of student, graduate and education provider mobility and supports access to further education and training. It is an essential step in realising the enormous social, cultural and economic value of an Australian education. It also underpins the international competitiveness of Australian services, goods and manufacturing industries. The interconnected, technologically driven and globally mobile world necessitates fair recognition of an individual's studies and qualifications, wherever they are from, wherever they are going, and regardless of where or how they studied. The recognition of qualifications supports individuals, both Australian and overseas educated, to access further education and training and ultimately, obtain gainful employment. In effect, it directly supports global mobility of Australian education providers and innovative modes of education delivery.

With the rise of offshore delivery options, international conventions are playing an increasingly important role globally in the fair recognition of quality assured studies and qualifications using diverse delivery modes. Understanding these newly developed conventions will help improve the recognition of Australian qualifications delivered onshore, offshore and online. These conventions house best principles and practices, and offer a pragmatic framework for cooperation, supporting international partners to recognise Australian studies and qualifications, and providing students with confidence that an Australian education will be recognised at home or in a third country. Australia plays an important leadership role in supporting the implementation of qualifications recognition best principles and practices in the Indo-Pacific region and globally.

Action:

4.2 Ensuring global competitiveness

- A.** The Australian Government will work with the sector to ensure visa settings continue to support diversification and growth and align with Australia's skills needs. The government has announced changes to visa settings which:
 - i.** permanently increase the length of temporary graduate visas for graduates from two to three years for Masters by Coursework students.
 - ii.** temporarily increase from 18 to 24 months the length of temporary graduate visas for VET graduates to match that of Bachelor Degrees.
 - iii.** temporarily expand opportunities for VET graduates to apply for a temporary graduate visa by removing the requirement for a qualification assessment and occupation nomination from the skilled occupation lists for 2022-23 financial year.
 - iv.** allow temporary graduate visa holders, who lost time due to pandemic travel restrictions, to reapply for a replacement visa.
 - v.** extend existing measures for students and temporary graduates to recognise time spent offshore studying online to count towards qualifying for a temporary graduate visa.
- B.** The Australian Government and the sector will promote Australia's international education globally, with a focus on attributes that set us apart from competitors.
- C.** The Australian Government will work with domestic and international stakeholders to strengthen the recognition of Australian qualifications to secure further study and employment opportunities for all students that study with Australia.



DETERMINING AUSTRALIA'S SUCCESS IN INTERNATIONAL EDUCATION

The table below summarises all actions included in the Strategy and details on measures of success. The Council for International Education will provide leadership, drive implementation of the Strategy and monitor progress in partnership with government agencies and education providers to ensure that our collective efforts are aligned to meet future challenges.

A co-ordinated approach will ensure that Australia sets the highest possible standards in education and research. All parts of the international education community need to work together to ensure a *Connected, Creative and Caring* international education community.

Measures of success

- Growth in number of students enrolled in offshore and transnational education and training delivered by Australian providers. To be measured as year on year growth through the Higher Education Information Management System and Tertiary Collection of Student Information.
- Growth in proportion of international students employed or enrolled in further study after graduation. To be measured as year on year growth through the Quality Indicators for Learning and Teaching (QILT) Graduate Outcomes Survey.
- Growth in proportion of international students who are satisfied or very satisfied with studying and living in Australia. To be measured as year on year growth through the Quality Indicators for Learning and Teaching (QILT) Student Experience Survey.

Actions

Action 1.1 *Diversifying student cohorts and source countries*

A. The Australian Government will drive better diversity of international students to improve sector resilience and student experience, with a particular focus on Australia's public universities.

- The government will work with the sector to identify the optimal make-up of international student cohorts and publish guidelines to inform sector decision-making.
- The government will establish and publish an easy-to-understand measure to improve transparency of diversity of international students at public universities.
- The government will work with universities on the development of international student Diversification Action Plans to increase business resilience.
- The government will develop a diversification index to drive transparency of cohort mixes.

Action 1.2 *Diversifying offerings to capitalise on digital and offshore offerings*

A. The Australian Government will grow and diversify Australia's offshore and online delivery to international students.

- The government will engage with other countries to reduce obstacles to Australian providers operating offshore and online, including through trade agreements and aligning Australian and international settings.
- The government will address barriers that limit recognition of Australian qualifications delivered online and offshore.
- The government will deliver targeted programs to attract international students to Australian education and training in diverse modes of delivery.

Action 2.1 *International education that meets Australia's skills needs*

A. To align educational offerings with employment opportunities, the Australian Government will improve education providers' understanding of Australia's future skills needs.

- The government will build knowledge of Australian skills needs through targeted provision of National Skills Commission data.

B. The Australian Government will expand opportunities for non-Australian Qualifications Framework courses to be delivered offshore particularly in areas of future skills needs.

- The government will broaden the offerings of International Skills Training courses to reach more countries.

Action 2.2 *Setting high-quality partnerships for research and collaboration, fostering innovation and Australia's growth that meets skills needs*

A. The sector and the Australian Government will build sector capability, so Australia continues to be an attractive, secure and trusted international research collaboration partner.

- The government, through its overseas networks of diplomatic posts, will expand Australia's research capability by identifying opportunities for international research collaboration.
- The government will assist universities and industry to translate and commercialise Australia's research into new products and innovations.

Action 3.1 *Strengthening connections between international students and Australian students and communities*

A. The Australian Government will work with the sector to support student linkages beyond the confines of the campus and into local communities.

- The government will support initiatives to drive social cohesion in Australian communities, including for international students.
- The government and the sector will continue to profile the importance of international students and the value they contribute to Australian communities.

B. The international education sector will enhance domestic and international student linkages.

- The sector will identify and promote opportunities for domestic and international student linkages.
- The sector will support an optimal student mix in classrooms and communities for the benefit of both domestic and international students.

Action 3.2 *Enhancing people-to-people links through international education mobility*

A. The Australian Government and the sector will support offshore mobility for Australian students via mechanisms such as joint partnerships with international institutions.

- The sector will raise awareness among Australian students of the breadth of offshore mobility options available.
- The government will establish joint education arrangements with international governments to enable easier market access for Australian providers.

B. The Australian Government and the sector will continue to capitalise on the potential of Australia's alumni networks to promote Australia and advance national interests, especially in the Indo-Pacific.

- The sector will deliver activities that connect their alumni with Australia.
- The government and the sector will showcase alumni as ambassadors for Australian education.
- The government will promote alumni relations through the Australian Government's overseas diplomatic network.

Action 3.3 *Student experience and wellbeing*

A. The Australian Government will work with the sector and state and territory governments to enhance students' awareness of their rights and responsibilities while living, working and studying in Australia, and support the capability of all providers to deliver student support programs.

- The government will undertake regular reviews of the satisfaction of international students across sectors and report on outcomes.
- The government will work with state and territory governments and providers to streamline communication and publish key information on working and living rights of international students.

B. The Australian Government will maintain student representation on the Council for International Education to ensure the voices and experiences of international students continue to inform relevant policies.

- The Council for International Students Australia will maintain an ex-officio position on the Council for International Education.

Action 4.1 *Maintaining a strong quality framework to ensure continued growth*

A. The Australian Government will provide a package of support measures including \$27.8 million in fee relief from regulatory charges in 2022, including certain fees for Australian Skills Quality Authority (ASQA), Tertiary Education Quality and Standards Agency (TEQSA), Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS) registrations and the Tuition Protection Service (TPS) Levy.

B. The Australian Government will conduct a review of the ESOS Act and the National Code, with a view to ensuring this legislation continues to support: (i) innovation within the sector; (ii) high quality education online and offshore; and (iii) an optimal student mix and optimal student experience for all students.

- The government will undertake a targeted review of the ESOS Act and the National Code.
- The government will ensure ongoing consideration of the ESOS Act to ensure settings continue to support diversity, innovation, quality, and the student experience.

C. The Australian Government will work to improve data systems to reduce administrative burden on providers and increase data availability.

- The government will continue to collect and publish data sets and visualisations that explore international student demographics at Australian institutions.
- The government will modernise the Provider Registration and International Students management System (PRISMS) to reduce burdens and increase data availability for providers.

Action 4.2 Ensuring global competitiveness

A. The Australian Government will work with the sector to ensure visa settings continue to support diversification and growth and align with Australia's skills needs.

- The government has announced changes to visa settings which:
 - i. permanently increase the length of temporary graduate visas for graduates from two to three years for Masters by Coursework students.
 - ii. temporarily increase from 18 to 24 months the length of temporary graduate visas for VET graduates to match that of Bachelor Degrees.
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 - iv. allow temporary graduate visa holders, who lost time due to pandemic travel restrictions, to reapply for a replacement visa.
 - v. extend existing measures for students and temporary graduates to recognise time spent offshore studying online to count towards qualifying for a temporary graduate visa.

B. The Australian Government and the sector will promote Australia's international education globally, with a focus on attributes that set us apart from competitors.

- The government will advocate for Australian education and research in multilateral fora, including the G20, the Organisation for Economic Co-operation (OECD), Asia Pacific Economic Cooperation (APEC), United Nations Educational, Scientific and Cultural Organization (UNESCO), and the Association of Southeast Asian Nations (ASEAN).
- The government will deliver targeted programs to promote the benefits of studying in Australia or with Australian providers.

C. The Australian Government will work with domestic and international stakeholders to strengthen the recognition of Australian qualifications to secure further study and employment opportunities for all students that study with Australia.

- The government will work through multilateral fora, including the UNESCO *Tokyo Convention* and the new Global Conventions to encourage the adoption of qualifications recognition best practice by overseas governments.
- The government will work bilaterally with overseas governments to minimise barriers to the recognition of Australian qualifications regardless of mode of location of delivery.

