



Australian Government

Australia's International Education and Skills Strategic Framework

Draft for Consultation

The Australian Government acknowledges the Traditional Owners of the lands and waters throughout Australia and acknowledges their continuing connection to land, water and community. Australia's First Nations peoples are the custodians of the world's oldest continuous cultures of learning and the passing down of knowledge. We pay our respects to them, their Elders past and present, and the continuation of cultural, spiritual and educational practices of Aboriginal and Torres Strait Islander peoples.



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The document must be attributed as *Australia's International Education and Skills Strategic Framework: Draft for Consultation*.

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A Future Direction

International education in Australia is a valuable asset that has delivered significant economic and social benefits for our community. It can boost our future prosperity, help meet current and future skills needs, and strengthen our relationships across the world. Aligning international education with these objectives will build community support for this important sector and reinforce benefits for Australia over the long term.

A range of pressures on this sector have emerged in recent years:

- serious integrity and quality challenges have been identified as students have returned to Australia
- unpredictable international student numbers onshore have the potential to undermine the sector's social licence, and
- in the context of new directions in migration policy, there is renewed pressure for international education to contribute to Australia's skills needs.

Alongside these challenges, there are significant opportunities for the sector to thrive, including through innovative approaches to delivery.

To support its quality, integrity and long-term sustainability, the Australian Government is taking an active and engaged approach to the management of the sector.

Embracing these opportunities and responding to these challenges will require government, providers and business to work together so that international education and training can continue to generate economic productivity and social vibrancy, with the support of the Australian community.

Australia's International Education and Skills Strategic Framework (Strategic Framework) sets out a future direction for the international education and training sector—one that is sustainable, high-quality, diverse and founded on integrity. This vision can be achieved through clear actions aligned to our national objectives.

Changes and Challenges

In 2021 the sector came together to develop the *Australian Strategy for International Education 2021-2030*. It was a starting point for post-pandemic recovery for the sector. While much of this work remains relevant, Australia's national and global environment has fundamentally changed since then and further work is needed to position the international education and training sector for the future. This new Strategic Framework sets clear expectations for a high quality and high integrity system.

Unmanaged growth in international education has seen a rise in integrity issues, compounded infrastructure pressures with insufficient purpose-built student accommodation for international students, and threatened the sector's social licence and Australia's reputation.

Recent reviews have identified integrity issues within Australia's international education sector including the Review of the *Migration System Final Report 2022* (Migration Review), *The Rapid Review into the Exploitation of Australia's Visa System* (Nixon Review) and the Joint Standing Committee on Foreign Affairs, Defence and Trade Inquiry into Australia's tourism and international education sector's *Quality and Integrity—the Quest for Sustainable Growth: Interim Report into International Education*.

International students have been exposed to a range of exploitative practices, and our education and migration systems have been subverted by unscrupulous actors to the detriment of student experience, graduate employability, and meaningful progress towards meeting skills needs. These reviews identified unscrupulous education agents, education providers and students exploiting the migration and education systems for profit.

The Government has zero tolerance for the manipulation of the international education and migration systems to exploit vulnerable international students. All international students deserve a safe and high-quality education. This intention is reflected throughout this Strategic Framework.

Australia cannot accept poor practices and unscrupulous providers that exploit students and undermine Australia's reputation. The Government has taken early action to protect students and ensure such providers have no place in our education and training systems. There is more to be done over the coming years. The Government will carefully manage onshore student numbers and maintain a balanced system underpinned by strong and effective compliance action.

The Migration Strategy sets a direction for managed growth through policy changes that support quality and integrity in the international education sector. These include increased English language levels and financial requirements for student visa applicants and improved ability for the Immigration Minister to suspend international recruitment by unscrupulous providers. The Government is also ensuring the quality and integrity of Australia's education system by supporting the sector to mitigate the risk of foreign interference. Through mechanisms including the University Foreign Interference Taskforce, the Government is continuing to support the sector—who work at the leading edge of policy, research and scientific development—to ensure it continues to build awareness and resilience to foreign interference risk. Over-reliance at a sector level, or provider level, on international students from one country or a small number of countries is an unacceptable risk in this environment, making diversification a key objective.

The Government, the community, and the international education and skills sector need these challenges to be navigated well. Balancing community sentiment, student expectations of a quality education, increasing international competition for skills, meeting infrastructure pressures and anticipated technological shifts, all require careful calibration. The positives if we do this well are immense—for individuals, communities, partner countries and regions, and for Australia.

Charting a Way Forward

There are significant opportunities for the international education sector now and into the future in Australia in providing high quality onshore and offshore education and training. This Strategic Framework reflects the shared commitment of the sector and Government to embracing these opportunities, and maintaining high standards and integrity. To chart a way forward and build on its strengths, Australia's international education and training sector needs to continue addressing challenges to its reputation and operations as they arise.

The Strategic Framework is focused on maximising opportunities for the sector. It sets overarching priorities for international education in Australia, highlighting our focuses on responsibly managing growth to support a thriving education sector, supporting Australia to meet its skills needs, and strengthening and deepening our international relationships.

Managing the system to deliver sustainable growth over time

To ensure the long-term sustainability of the sector, the Government is committed to implementing a managed system to deliver sustainable growth over time for onshore international education. This builds on measures already underway, including through the Migration Strategy, to improve the quality and integrity of the sector. Australia has one of the highest per-capita rates of international students. The Government and sector need to work together with creative solutions and innovative approaches to address integrity and infrastructure pressures, and ensure international and domestic students have access to an education system that delivers high-quality learning experiences.

Supporting Australia to meet its skills needs

Over 3 million international students have gained an Australian education or training qualification, supporting economic growth for Australia and our key partner countries, as well as building lasting ties between Australia and countries in the region. Like other countries, Australia faces challenges in meeting current skills shortages and those of the future. International students often contribute to Australia's labour market while they study, and some go on to contribute to Australia permanently by building our skills base. A longer-term approach that better aligns Australia's onshore education and training offerings with our skills needs will deliver benefits to Australia and to graduates alike. It will provide clearer opportunities for graduates with the skills we need to help meet Australia's future workforce requirements.

Strengthening and deepening our international relationships

The Government embraces the important role education plays in advancing Australia's global interests beyond our borders. By strengthening people-to-people links and increasing access to Australia's education systems, we are contributing to a more informed, peaceful, prosperous, and resilient region.

Australia is a global leader in the delivery of transnational education; there are more than 10 Australian universities operating International Branch Campuses across 10 countries, with 3 further branch campuses expected to be opened by late 2024. Australian providers are supporting a range of innovative transnational education pilots across key regions, assisted by Government efforts working closely with partner governments to address regulatory barriers and expand transnational delivery.

These efforts are taking Australia's education and training system to the world. Our key strategic interests will advance through greater education engagement with the Pacific, Southeast Asia, China and India in particular. Aligning with *Invested: Australia's Southeast Asia Economic Strategy to 2040* and *A Partnership for the Future: Australia's Education Strategy for India* is an opportunity for the international education sector to contribute to the implementation of these important objectives. Australia's support to education and training outcomes for the Pacific helps to build a peaceful, resilient and prosperous region.

Collaboration continues to strengthen, deepening connections between Australia and our key partners. For example:

- The opening of a Monash University campus as the first foreign university campus in Indonesia.
- The University of Western Sydney and Deakin University will establish campuses in Indonesia in 2024.
- In 2023, the establishment of Deakin University and University of Wollongong campuses in GIFT City, India, as well as 16 new partnership agreements between Australian and Indian institutions.
- The Bendigo-Kangan Institute has partnered with India’s Government of Gujarat and automaker Maruti Suzuki as a knowledge partner to establish the International Automobile Centre of Excellence in Gujarat.
- In 2024 Murdoch University opened an offshore campus with a local partner in Malaysia and has been operating in a branch campus in Singapore since 2013.

When a student studies in Australia or when an Australian student goes overseas to study, they get more than an education. When they return home they take friendships, experiences, and a cultural understanding with them, forming a bridge between Australia and the rest of the world.

International education should not be a one way street. It is not only about international students coming to Australia to study – increasingly, it’s about taking Australian providers to the world. Establishing offshore campuses and other types of transnational education helps more students have a high quality education in their own or another country, deepening our international relationships.

This Strategic Framework sets a new direction—for a sustainable, high-quality, and diverse international education and training sector, founded on integrity

This Strategic Framework establishes clear actions for Australia’s international education sector:

- Maintaining high-quality providers and high-quality courses underpinned by a strong and transparent regulatory framework.
- Implementing a managed system to deliver sustainable growth over time.
- Ensuring offerings have strong alignment to our skills requirements for a prosperous future-Australia.
- Carefully considering challenges in the sector as they arise to deliver outcomes for the national interest.
- Advancing Australia’s foreign policy, economic and development interests, particularly in the Pacific and Southeast Asia.
- Ensuring the system is free from exploitation.
- Expanding offshore, online, other innovative arrangements to diversify the sector.
- Contributing to global skills needs.
- Advancing Australia’s strategic interests.

Objective 1: A Sector Built on Quality and Integrity

Australia's global reputation is built on our high quality education and training systems. Action is needed to ensure it remains that way. The actions of a small number of unscrupulous providers undermine Australia's reputation and exploited students.

Work to strengthen the integrity of the sector is in the best interests of students and of our many high-quality providers. Australia's economy then benefits—with the sector attracting high performing genuine students and delivering quality graduates who can contribute to Australia's skills needs.

Strengthening the integrity and quality of international education must be calibrated to target risk and ensure only those providers who meet Australia's quality standards are able to operate. The capacity and composition of the international education sector needs careful management. It can be better focussed on how and where high-quality courses are delivered and their relevance to Australia's skills needs, and thereby support a social licence that ensures the sector's sustainability.

A focus on integrity is embedded across the international education sector, from the recruitment of students, through visa application processes to the delivery of courses. Prospective providers must be thoroughly assessed to ensure genuine intention and capacity to deliver to international students without risk of exploitation.

Integrity in the system is evidenced by the delivery of a high-quality product and experience to international students. Through quality in product and delivery, trust in the sector will increase and reinforce Australia's reputation as an education destination of choice. This will have flow on benefits for Australia's economy.

The Government is focused on ensuring integrity in the student recruitment process. The Migration Strategy places additional scrutiny on high-risk student applications. Additional work across government is underway tackling unscrupulous education provider.

Case Study: National Foundation for Australia-China Relations and Charles Darwin University Indigenous Immersion Program

The Foundation's Charles Darwin University (CDU) Indigenous Immersion Program enriches the educational experience of Chinese international students by introducing them to First Nations culture. Through experiential trips and conversations with Indigenous elders in the Northern Territory, the program connects Chinese international students with Indigenous culture, history, and contemporary issues. The Foundation created a video featuring Niki Chen who is a Chinese international student with CDU, and highlighted her positive experiences with the Program and with living and studying in Darwin.

Implementing integrity reforms

The Government has, and will continue to, undertake reform across the international education and migration systems to embed robust, agile, and fit for purpose regulatory and risk frameworks to address emerging integrity and quality issues.

Strong regulation of the sector disrupts and deters those who seek to exploit Australia's international education system and ensures a quality student experience. Several reviews, including the Review of the Migration System announced in September 2022 with the Final Report delivered in March 2023 (Migration Review), and The Rapid Review into the Exploitation of Australia's Visa System, announced in January 2023 with final report delivered in March 2023 (Nixon Review) found more needs to be done to ensure the integrity of the international education sector.

Changes to the *Education Services for Overseas Students Act 2000* (ESOS Act) and associated instruments, known collectively as the ESOS framework, have increased the accountability of education providers and their agents. These changes complement reforms from the Australian Government's Migration Strategy, released 11 December 2023, which outlines the Government's vision for a better targeted migration system.

Following release of the Migration Strategy, Government acted quickly to implement reforms to ensure the quality and integrity of the international education sector and student visa program. On 24 August 2023, the Government closed the concurrent study function in the Provider Registration and International Student Management System (PRISMS). This followed identification of unscrupulous practices by providers to 'poach' international students within the first six months of their course. Government will consider if further change is needed to prevent poaching, including through lengthening the six month no-transfer period to 12 months.

From 1 July 2023, Government reintroduced the working hours cap for student visa holders at an increased level of 48 hours per fortnight, and from 1 October 2023, the savings requirements for obtaining a student visa increased by 17% to \$24,505, with a further increase to \$29,710 occurring on 10 May 2024.

Additionally, in a suite of changes implemented as part of the Migration Strategy in March 2024, the English language requirement for a student visa was raised, a Genuine Student requirement replaced the Genuine Temporary Entrant requirement, and the Minister for Home Affairs announced the use of powers under section 97 of the ESOS Act to suspend high-risk providers from recruiting international students.

The measures to recalibrate student and graduate visa settings support both the education sector and Australia's migration needs through clearer pathways to residency for genuine students in areas of skills shortage, and ensures graduates do not become 'permanently temporary'. These reforms improve onshore students' educational experience in Australia. They provide pathways for students with the skills Australia needs to transition to the workforce and help drive economic productivity while making clear that all students need to abide by their visa conditions. Not all students will be able to remain in Australia, but they will contribute to the development of the workforce regionally and around the world, enhancing Australia's international people-to-people linkages. They strengthen the alignment of the composition of the onshore student cohort with Australia's national interests.

Through the use of quality agents, providers can have confidence that students they enrol are genuine and studying courses appropriate to their needs. Provider-agent business relationships that seek to undermine the migration and education systems will not be tolerated. The Government will not support exposing students to exploitation.

The entry of non-genuine or high-risk providers to the international education sector affects the reputation and quality of the overall sector.

'Discount' providers looking for a quick return by offering lower fees and shorter durations, compete against genuine providers who charge appropriately for quality education products. These providers focus on recruiting students who are already in Australia and 'poach' students from genuine providers. These

behaviours create unfair competition, may put genuine providers out of business, and negatively affect the experience of international students.

Providers seeking to enter the international education market will be required to have delivered courses to domestic students for 24 months in most circumstances. This demonstrates their commitment to quality education and closes a loophole for those providers seeking to solely target international students, often of a single nationality for profit and potentially to channel them into employment rather than study. Where a provider has not delivered a course to international students for a period for 12 months, their registration will be cancelled.

The Government will enact a stronger fit and proper provider test, to prevent collusion between education agents and providers, protecting vulnerable international students from exploitation and coercion. Providers found not to be fit and proper will have an automatic condition applied so they cannot enrol any more international students.

A ban on agent commissions for onshore student transfers between providers removes incentives for unscrupulous agents and providers to 'poach' students and reaffirms the provider's key role to support and advise their students.

Strengthening integrity ensures the Australian public can have confidence that the international education sector is operating in the best interests of students and the economy, including through contributing to Australia's critical skills needs.

Legislative changes will provide Government with the power to prevent providers from delivering courses which have significant quality and integrity issues, or which have limited value to Australia's skills needs.

Overseas students bring a diversity of perspectives and cultures, enriching the experience of domestic students and the broader community. Many overseas students seeking to remain in Australia have also found themselves in a state of being 'permanently temporary' as they had no pathway to a permanent visa.

To support changes outlined in the Migration Strategy, the Government will also introduce the ability for the Minister for Education to stop accepting or processing applications for registration of new providers and new courses.

Legislative changes address persistent integrity concerns by raising the English language requirement for a student visa, and introducing the Genuine Student requirement to replace the Genuine Temporary Entrant requirement.

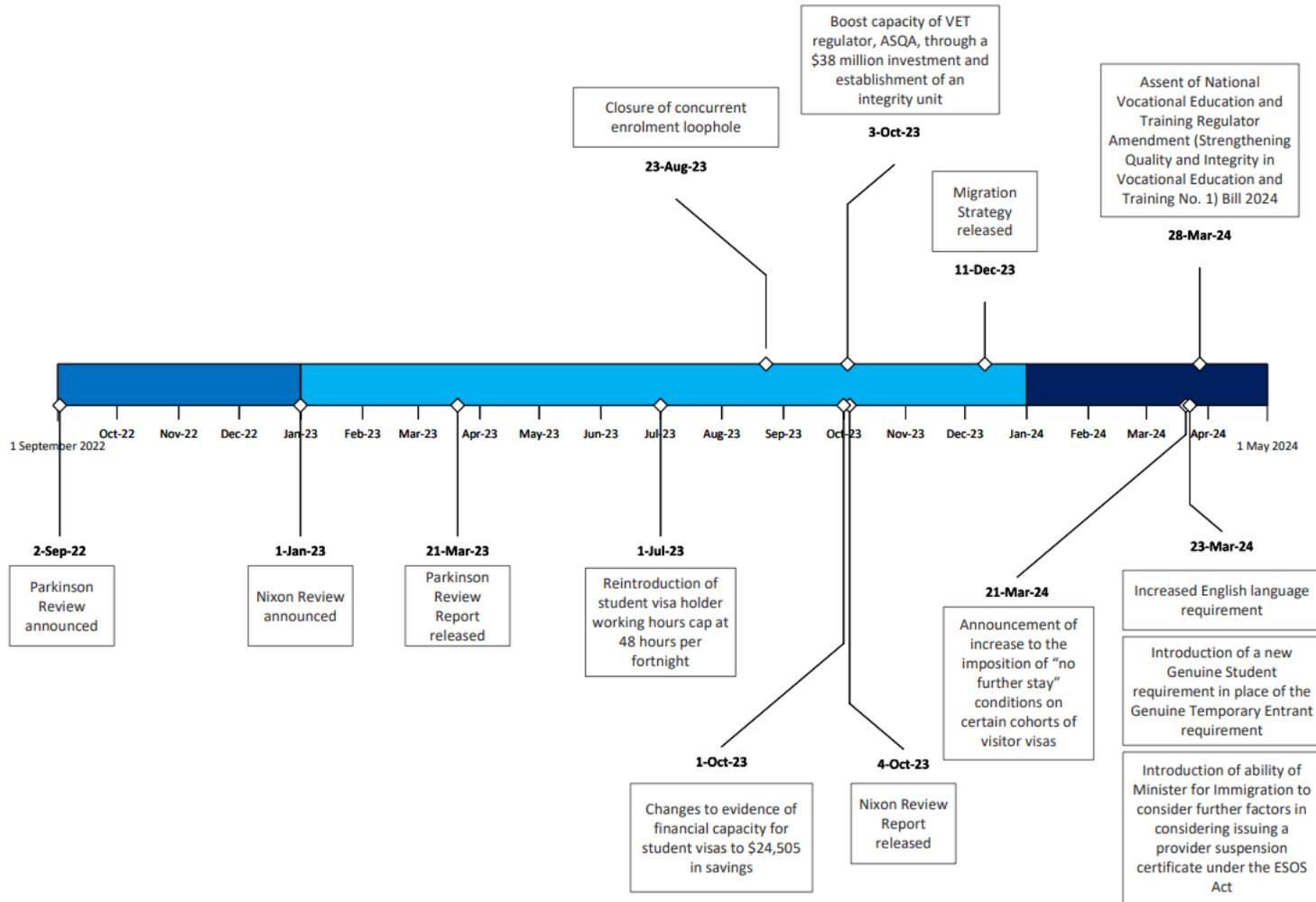
Switching off the concurrent study function

On 26 August 2023, the Australian Government took action to close a loophole that was identified with facilitating 'poaching' of international students and other non-genuine student activity. The concurrent study function that allowed students to hold concurrent enrolments was identified as an avenue to avoid transfer restrictions under the National Code of Practice for Providers of Education and Training to Overseas Students 2018 (National Code).

In practice, this provision had allowed education providers to shift international students who had been in Australia for less than 6 months from genuine study to an arrangement designed to facilitate access to work in Australia. Prior to this Government action, there had been a sharp uptake in the use of the concurrent function in 2023. In the first half of 2023, 17,000 concurrent enrolments were created, compared to approximately 10,500 for the same period in 2019 and 2022 combined.

Following the changes, students can still study courses concurrently once they have passed 6 months with their original provider, or if their provider agrees to their release.

Integrity measures timeline



A sustainable and diverse sector

A robust and sustainable sector is one that is diverse and able to withstand and respond to changes in demand from students and in Australia's economic and skills needs.

There are currently over 1,400 registered providers across all sectors. Historically providers have been allowed to request the number of enrolments they want to offer overseas students, with limits on their capacity to deliver determined by their premises and teaching capacity. The number of enrolments has not been considered at a strategic level to determine the appropriate size and composition for a sustainable international education sector.

Under this Strategic Framework, the Government will work with the sector to consider the optimal make-up of the onshore international education sector. This will take into account integrity and quality issues at a provider, location and course enrolment level and determine whether the composition of the sector is optimised to deliver the skills Australia needs.

Experienced and ethical providers

The ESOS Act and the National Code set standards to ensure education services meet the needs and expectations of international students who come to Australia and satisfy the objectives of the ESOS Act. This includes outlining the responsibilities of providers in recruiting students, provider-agent relationships and supporting students, but the Nixon Review¹ found that some education providers and their agents are exploiting the visa and education systems. To address these concerns, greater scrutiny is required at the point of entry to the market.

Prospective providers will need to demonstrate to a higher level that they are ready to deliver courses to overseas students. This includes an assessment that they are 'fit and proper' and have relevant experience and capacity to deliver quality products and support the best interests of the student.

Provider relationships with agents will be scrutinised to disrupt and deter the potential exploitation of students.

¹ [Rapid Review into the Exploitation of Australia's Visa System Report \(homeaffairs.gov.au\)](#), p15.

Best interests of the student

As noted in the *Australian Strategy for International Education 2021-2030*, promoting students' best interests leads to positive outcomes. Keeping the student at the centre of the international education system will focus agent and provider behaviours on delivering quality and acting with integrity.

Education agents are the 'face' of the provider in the student recruitment process. It is imperative that providers are supported to select the agents who will operate in the best interests of the student as well as the provider and apply due diligence when assessing the genuineness of a prospective student.

Increasing transparency of agent commissions and performance data will enable providers to better act on their responsibility under the National Code to ensure that their agents act ethically, honestly and in the best interests of students. It will also empower students through greater consumer awareness.

Actions of providers must reflect a commitment to the best interests of the student. This includes facilitating changes in their courses where appropriate and supporting students in their broader interactions with the Australian community, whether socially or through employment.

Enhanced monitoring

It is critical for Australia's reputation that relevant agencies respond quickly and effectively to combat emerging integrity or compliance issues and act against unscrupulous education providers.

Strong, whole of system data sharing activities and robust risk indicators will enable the regulators to address integrity concerns. This includes the development of evidence-based risk indicators for the international education sector to inform a robust whole-of-system risk architecture and to drive targeted compliance activity by education regulators.

The Australian Skills Quality Authority (ASQA) recently announced an uplift in their systems and resources to address quality and integrity concerns in the Vocational Education and Training (VET) sector.

The Department of Education will continue to work with ASQA and the Tertiary Education Quality and Standards Agency (TEQSA) to identify and address issues and behaviours of concern.

Questions for sector consultation

1. Are there further reforms governments should consider that will improve the quality and integrity of the sector?
2. What more can providers do to improve the integrity of the international education sector?

Objective 2: A Managed System to Deliver Sustainable Growth Over Time

There is a promising future for the international education and training sector aligned to Australia's national interests. Actively managing the growth of the sector will protect its reputation for excellence, and maintain its social licence for a long-term, sustainable future. Building on a longstanding reputation for high-quality course offerings, strong relationships with alumni cohorts and strategic partners, the sector is well placed to continue to innovate and transform for the future.

Implementing a managed system to deliver sustainable growth over time

International education is a significant national asset for Australia. The sector's significant growth has been accompanied by challenges — unscrupulous providers, unpredictable growth, and exploitation of international students. These challenges require careful response from the sector, led by the Government, to ensure the long-term sustainability of the sector.

In recent years, and most acutely since the post-pandemic return of international students, unmanaged growth in international education has seen a rise in integrity issues and threatened the sector's social licence and Australia's reputation.

The Government is committed to managing the system to deliver sustainable growth over time. The Government announced several policies in the Migration Strategy that have impacted on growth in international education. These changes have had positive impacts on integrity and have helped return growth in international education back to sustainable levels, but a longer-term approach is needed to ensure this is managed across the sector. Further work is required to ensure regional and outer metropolitan universities are appropriately supported in any change, and to ensure providers' attempts to diversify markets can be encouraged.

A managed system to deliver sustainable growth over time will build on measures already underway to improve the quality and integrity of the sector. This will provide clarity to providers and students, help preserve the sector's social licence, support Australia's skills needs, and advance the viability of regional providers. This approach will be enabled by legislative amendments to manage growth in the number of enrolments in courses and at providers, giving crucial certainty to education providers about the size of the sector.

Amendments to the *ESOS Act* will enable this approach, giving Government the power to:

- limit or cease the ability of providers to deliver courses which the ESOS agencies determine have persistent quality and integrity issues, or those in areas which the Government determines have limited value to Australia's critical skills needs.
- allow Government to set limits on enrolments at a provider level, including within specific courses or locations.

These powers will enable Government to implement a managed system to deliver sustainable growth over time, in consultation with the sector. This approach will apply across higher education and VET. Growth in both sectors will be carefully managed through separate approaches to reflect structural differences between the sectors.

Within a plan for managing the system:

- Public and private higher education provider enrolment levels will be determined by the Minister for Education.
- Enrolment levels for VET providers will be determined by the Minister for Skills and Training

Government will consult with both the higher education and VET sectors on approaches to implementing a managed system to deliver sustainable growth over time that maximise opportunities and mitigate risks unique to each sector, while supporting a common set of policy objectives for government.

Government will establish a process to set international student profiles with individual universities that limit how many international students can be enrolled over a set time period, supported by changes to the ESOS Act. A range of considerations will influence the profiles allocated to universities, including the university's supply of purpose-built student accommodation, and the contribution of enrolments to meeting Australia's skills needs. Government will allow universities to enrol additional students above their international student profile where the university establishes additional, newly built supply of purpose-built student accommodation.

Government will work closely with the sector to implement this policy and establish transitional arrangements that support the sector to manage this change effectively.

Implementation of this approach will consider the need to provide particular support to regional delivery and regional universities. As the sector transitions into these settings, international student profiles will be included as an element of mission-based compacts agreed between universities and the Australian Government.

For VET providers, Government will consult with the sector on a mechanism to distribute VET international student enrolments in accordance with the Government's objectives for managing the system. Policy development relevant to the VET sector will consider the complexity of the sector, particularly its size and scale as well as the close engagement needed with states and territories in managing the system.

Government is mindful of the disproportionate impacts that managing the system to deliver sustainable growth may have on key student cohorts such as those from China and India. A focus of this approach will be to support the need for diversity across the international education sector.

International student enrolments in postgraduate research degrees add significant value to Australia's broader innovation and skilled migration objectives, and are a small component of the international student cohort (3 per cent). Schools, short courses, non-packaged short English courses, and non-award courses' enrolments are small, have manageable housing and infrastructure impacts and are substantially lower than in other areas of the sector.

As a further part of this consultation, Government will consider settings for postgraduate research enrolments, schools, short courses, non-packaged short English courses, and non-award courses, and the appropriateness of excluding these from new settings to manage growth.

The Government will work closely with the international education sector in developing a plan for a managed system to deliver sustainable growth over time, and to align objectives for the sector with other areas of government policy such as those determined for domestic students through the Australian Universities Accord Final Report.

Stewardship of the sector

National assets require care. With careful stewardship, the sector's value can be enhanced long into the future. Stewardship requires all stakeholders to participate in the management of the sector.

A cohesive policy and regulatory ecosystem is necessary to usher the sector into the future.

Australia provides rigorous protection for international students through a robust legislative framework (the ESOS Act and related legislation), which protects and enhances Australia's reputation for quality education, provides tuition protection and supports the integrity of the student visa program.

The Department of Education is responsible for the Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS). Only education institutions registered under the ESOS Act and listed on CRICOS can enrol overseas students to study in Australia on a student visa.

The Government continues to work with the sector to ensure the legislative framework remains fit for purpose.

Stewardship also includes strong connections to visa settings and appropriate pathways to permanency for those interested in sharing the skills we need, improved graduate outcomes tied to national skills needs, and a flourishing network of relationships. This includes people-to-people and institution-to-institution relationships, aligned to our national interests. It is based on Australian education and training providers being of the highest quality and with unshakeable integrity.

Stewardship of the sector should be underpinned by formal avenues for advice and decision-making. It must actively engage with the composition of the sector, align the sector with the national interest, and support actions that enhance the sector's social licence to operate.

The Council for International Education (the Council), comprising Commonwealth Ministers and sector experts, is a key vehicle for sector stewardship. It brings the international education and skills sector and student voice to the development of policy and implementation of innovative solutions to pressures. The Council is effectively positioned to advise the government, convey the views of the sector, and help inform policy and regulatory decision-making.

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

Combined with ongoing dialogue between government and the sector, these mechanisms provide valuable advice to inform policy and operations for all parties.

Diversification

Opportunities in Latin America

Latin America is a region primed to engage more strongly with Australia in international education and training opportunities. With high-quality students looking to study in areas of priority skills for Australia, matching these students to regional locations can deliver long-term benefits for students, their source countries, and Australia. Latin American students in Australia have stronger employability outcomes than other international student cohorts, with a study last year finding Colombians and Brazilians were most likely to be working in a study-related field.

Australia is renowned for our world-class education system, with universities consistently ranking among the top globally. International students are an invaluable part of Australian communities, bringing new ideas and skills to enrich the fabric of our society, and a diversity of perspectives and experiences that are highly valued in our classrooms, and in the community. We provide a high-quality education, cutting-edge research, and state-of-the-art facilities to international students including those from our largest source markets: China, India and Nepal. We value the experience and skills our international students gain through studying in Australia, which can contribute to communities and workforces in both Australia and across the region. The connections between people bring us closer to our region and embed greater understanding in all our graduates of many cultures and ways of thinking.

Regardless of country of origin, concentrations of students in courses and locations have been a persistent issue in the Australian international education sector. The overwhelming majority of onshore international students study in Sydney, Melbourne and Brisbane (approximately 70 per cent of 2023 enrolments). There is work to be done to alleviate current pressures on accommodation, transport and other infrastructure. Governments at all levels will continue to provide leadership as the sector collaborates on implementing long term solutions.

Improved market diversity is one of those solutions. Students from our five largest source markets make up over half of all international enrolments in Australia. At a provider level, concentration is often even higher. High demand for Australian education from these countries is expected to persist. These students will continue to receive a high-quality education in Australia, and contribute extensively to the Australian community. Within the bounds of international population shares and demand for international education, there is more we can do to improve our source market diversity. Demonstrating the value of Australia's offerings more broadly can encourage more balanced patterns of student enrolments – regardless of their country of origin.

While international students are an important source of potential skilled migrations, student enrolments have not always been aligned with our national skills interests. In 2023, for example, 35 per cent of tertiary level international students studied business and management—skills not generally in shortage in Australia—and only 8.7 per cent studied in areas of health and education. Similarly, there is work to do to overcome barriers to the professional recognition of qualifications in areas of skills shortage, in partnership between providers, employers, professional bodies and governments.

Australia's policy settings must help the international education sector to remain flexible and innovative, able to grasp opportunities and respond positively to emerging trends, and support the broader economy through strong alignment to our national priorities.

Student experience

Providers have a central role in supporting the international student experience. A positive student experience improves student outcomes and promotes Australia as a destination of choice for the world's best students.

The sector works collaboratively with states, territories and federal governments to ensure a quality student experience for international students and enhanced community engagement. States and territories also celebrate the contribution that international students make to Australian society through annual international student awards.

The role of providers in ensuring student safety and supporting student welfare was emphasised in the Australian Universities Accord Interim and Final Reports. The Government has shown its commitment to student safety through its implementation of key measures such as the Support for Students Policy, an agreement to establish a National Student Ombudsman and the implementation of the Action Plan Addressing Gender-based Violence in Higher Education. Providers need to consider how they can support international students under these policies to ensure student safety and wellbeing.

The size of the international student cohort each provider enrolls should be considered against the capacity of the provider to support students to have a positive and safe student experience.

Education providers need to consider how they will ensure the international students they enrol are set up to succeed, including having a positive experience. Factors which need to be considered include:

- availability of suitable accommodation which an education provider can offer to international students
- the ability for the student to receive a quality education where they can seek additional learning support they may need
- support services which the provider can offer or refer the international student to which helps them to flourish during their time studying and living in Australia.

A sector that promotes opportunities for international students to engage with domestic students in and out of their classrooms will improve sector sustainability and enhance Australia's reputation as a destination of choice. It will also support the continued development of English language skills and broader cultural skills, and provide a solid foundation for international students to transition into the Australian workforce, and succeed using the skills they've developed.

Case Study: National Foundation for Australia-China Relations' Dr Stephen Fitzgerald Scholars Program

The Foundation's Dr Stephen Fitzgerald Scholars Program is designed to build a cohort of Chinese international students at the Honours, Masters and PhD levels with increased understanding of, and connection to, Australia. The program was named after Australia's first Ambassador to China and aims to foster lasting relationships through the next generation of Chinese leaders. The inaugural program took place in November 2023 and 30 high-performing Chinese international students from 20 Australian universities were nominated by their universities to participate in this prestigious program. Planning is underway for the 2024 program.

Graduates ready for work

Good employment outcomes are one of the most important factors for prospective international students when choosing a study destination, and important for Australia in seeking to attract and retain international students as skilled migrants.

Providing international students with access to work integrated learning prepares them for the workforce. It supports Australia's reputation for high-quality education. Through participation in work integrated learning, international students increase their capacity to find employment after graduation, build community networks, and improve their study experience.

Education and training providers play a vital role in promoting international students to prospective employers and providers of work placements. Institutions should strengthen their partnerships with employers and industries to create more internship and job opportunities suitable for international students and their visas.

Institutions should provide training and support to international students to participate in work integrated learning or internships, noting that there may be cultural differences and expectations within an Australian workplace which students may not be familiar with.

Through the Migration Strategy, graduate visas have changed to ensure more graduates are working at their skill level, addressing skills needs, and not becoming 'permanently temporary'.

Consistent with the Migration Review, Government has adjusted the length and eligibility of post study work rights. These changes give graduates sufficient time to demonstrate their ability to succeed in the skilled labour market and establish their careers, while setting boundaries for others with low prospects of becoming permanent residents. Where a graduate is working in a skilled job in the labour market, the graduate can apply for the new Skills in Demand visa or a permanent skilled visa, rather than requiring a two-year extension.

Stronger pathways from graduate visas to temporary skilled visas give employers more certainty about a graduate's ongoing work rights and pathways to permanent residence.

Ensuring international students have access to work integrated learning and other work experience during their studies means students gain skills beyond those available in the classroom. The experience also sets students up for better outcomes post-graduation. Through these experiences, international students build networks, develop their English language skills, and build the skills and attributes necessary to find suitable work in their field of study.

Innovation through Critical Skills Courses in Agriculture

The *Developing Critical Skills Courses in India* project, due for completion in 2024, piloted a new model for Australian and Indian VET providers to collaborate on course development and delivery in the agriculture sector. The project built partnerships between Australian and Indian education providers and industry through the development of courses that meet India's skills needs and are aligned to Australian standards. It offers a replicable collaborative solution to skills needs through building consortia of universities, vocational institutions and industry, aligned with Australia's geopolitical strategic interests.

Promoting regional Australia

To support greater sector sustainability and onshore diversification, government and education providers need to work more closely together to support the growth of the sector in regional areas of Australia.

The familiarity and amenities of major Australian cities have led to high concentrations of international students in metropolitan locations. However, regional Australia has much to offer international students in the way of unique experiences, opportunities for strong people-to-people connections on campus and in the community, and employment outcomes. The benefits are two-way: international students bring social, cultural, and economic benefits to regional Australia. They help support local jobs and industries, and internationalise regional education providers. However, in 2023, fewer than 10 per cent of international students resided and studied in regional Australia.

Australian communities and international students each have much to gain from increasing the share of regional Australia's international student enrolments. For example, many of the employability barriers faced by international students are due to a broader struggle to connect with local communities. Studying in regional locations provides international students with more opportunities to engage with local communities, on and off campus. Engagement in these regional settings can help build professional networks, improve English language skills, and foster the broad range of 'soft' skills that provide the foundation for employability.

Regional Australian higher education institutions are well positioned to deliver professional education in areas of acute skills needs in their regions, including nursing and teaching. Regional providers also often excel in specialist field of study rankings, for example James Cook University for marine sciences. The needs of providers in regional areas are particularly important in ensuring they are fully integrated into the system and not disadvantaged by their location or size.

More can be done to promote regional Australian university rankings at a field of study level, rather than institutional level, which could help grow regional Australia's share of international education enrolments, and contribute to diversifying international students' field and location of study, including in areas that align with Australia's skills shortages and source country priorities.

Promoting regional Australia abroad

In Latin America, the Australian Government has worked with the Regional Universities Network (RUN) to promote the quality education and research produced in regional Australia and facilitate international collaboration in areas of shared strategic interest, such as agriculture and energy. Following a series of online events with government and institutional partners in the region, RUN worked with the Department of Education to support a research mission to Brazil, Colombia and Chile in March 2024 to promote engagement on sustainability and the clean energy transition. This has increased awareness and strengthened the profile of regional Australia in Latin America, creating new opportunities to attract international students, academics and researchers, and strengthen international education linkages in areas of mutual benefit aligned with Australia's geopolitical strategic interests.

Meeting Australia's skills needs

Like other countries, Australia faces challenges in meeting current skills shortages and those of the future. International students often contribute to Australia's labour market while they study, and some go on to contribute to Australia permanently in building our skills base. International students with the skills Australia needs have the potential to make a strong contribution to the economy. Where they study courses that align with our skills needs, it can deliver benefits to Australia and to graduates alike. It would provide clearer opportunities for graduates with the skills we need to help meet Australia's future workforce requirements and help avoid circumstances where some become 'permanently temporary.'

More can be done to encourage study in areas of persistent and critical skills shortage such as in teaching and nursing.

International student enrolments in areas of critical skills shortage can be supported through a managed approach to student growth.

Innovation in research collaboration

The Australian Government's Offshore Counsellor Network proposed a Virtual PhD Internship Program (Internship) to the Malaysian Ministry of Higher Education as an innovative solution to impacted research collaboration activities during global travel restrictions in the pandemic. The Internship offered an opportunity for Malaysian PhD students at public universities to undertake an international research collaboration experience with world-class Australian researchers. This venture was the first of its kind in the region.

The key objectives of the Internship were:

- To hone critical skills in an international academic research setting
- To build collaborative partnerships with Australia
- To foster ongoing collaboration between Australian host institutions and Malaysian home institutions.

Ten PhD candidates in the fields of humanities, education and social sciences were selected from a competitive field to undertake a 2-month virtual internship with an Australian university, commencing in June 2022. Throughout the Internship, participants met online with their Australian supervisors and actively participated in the host research team's activities, including through seminar participation, peer group discussions and team journal clubs.

The Internship concluded with a hybrid academic symposium, where each PhD candidate presented their research findings. Candidates and supervisors reported an overwhelmingly positive experience of the Internship and candidates also fed back that their research and communication skills had improved greatly over the duration of the internship.

Every participant of the inaugural program has developed ongoing research collaborations with their Australian host university.

A second cohort of 12 Malaysian PhD students completed the Internship in 2023-2024, with 2022 participants acting as mentors for the new participants. A third cohort will commence in late 2024.

Alumni engagement and researcher networks

International students enhance our innovation, economic growth, and global competitiveness. For international students and their families, a return on investment means more than a quality education.

Alumni of Australian institutions and our scholarship and fellowship programs are critical to Australia's relationships in the region. International students enhance our innovation, economic growth, and global competitiveness.

Ensuring meaningful alumni engagement into the future will strengthen Australia's positive reputation and geostrategic policy. There is more that can be done in building the awareness and consideration of, and grow preference for, Australian services among learners, industry, and governments in key offshore markets.

In particular, the Australian government invests heavily in engagement with outbound and inbound scholarships program participants. Since the 1950s, Australia Awards and predecessor scholarships programs have produced an estimated 100,000 alumni – a diverse and talented group who contribute to positive development outcomes in our region and act as a vital diplomatic asset to help advance Australia's regional and global influence. This is balanced by over 43,000 (Australian) alumni of the New Colombo Plan since 2014, with experience and connections in the region. We will continue to build on and refocus existing programs to bolster on-award engagement with students and alumni engagement by posts. These efforts will ensure we continue to attract the best candidates and retain connections that underpin our strategic and development objectives across the region.

In addition to deepening connections between Australia and the Awardee(s), alumni engagement also provides opportunities for government and key partners to connect with our programs, highlight Australian policy, priorities and excellence, lay the foundations for long-term connections and strengthen bilateral relations. Our delivery partners play a crucial role in building and enhancing connections, including creating and delivering activities. Existing funding for Australian alumni engagement is used for activities such as exhibitions, small grant projects, professional development workshops and seminars.

Alumni Profile - Namgyal Dorji

Minister for the Ministry of Industry, Commerce, and Employment, Bhutan

Masters of International Relations, from the Coral Bell School of the Asia-Pacific College at the Australian National University

At the age of 39, the youngest member of the Bhutanese Cabinet, Australia Awards alumnus Namgyak Dorji provided welcoming remarks to the Australia Awards – South Asia & Mongolia Regional Alumni Workshop on 22 April 2024.

He expressed his gratitude to the Australia Awards Scholarship, the potential and support that the program provides.

“Australia has empowered 1200 Bhutanese leaders through Australia Awards... As Bhutan’s representative to the UN, I translated the theoretical foundations of my study at ANU into practical action. What a journey it has been. My Australia Awards experience has driven positive change...[and] reaffirmed my belief in creating a more just and equitable world.”

Case Study: Australia Awards Women Leading and Influencing (WLI) Pacific

The Australia Awards Women Leading and Influencing program provides leadership training, coaching and mentoring for Pacific scholars studying at Australian universities. Together, scholars build skills, networks and readiness and forge enduring person-to-person links with alumni in Australia and the Pacific. This network consists of almost 200 alumni and the 2024 cohort commenced their 18-month program with a leadership intensive at Outward Bound, Canberra. Scholars also met with Australia’s Minister for International Development and Pacific and other Ministers at Parliament House. Each cohort brings together diverse expertise and experience to explore leadership in practice, gender and inclusion, and deepen higher education networks to contribute to resilience and prosperity in the Pacific region.

Working with our region

Australia is committed to working with the Pacific and Southeast Asia to address our shared climate, economic, environment and security priorities. In addition to making an important social and economic contribution to the Pacific and Southeast Asia, international education and training can play a larger role in building the region's prosperity and security, as well as building connections between Australia and our regional partners.

Australia's world class education and skills systems are highly valued in the Pacific and Timor-Leste where skills development is a powerful driver of economic and social growth. Pacific partners value Australia's longstanding investments in education and training, including through the Australia Pacific Training Coalition (APTC), partnership with the University of the South Pacific (USP) and bilateral education programs. Commitment to the Pacific Regional Education Framework (PacREF) promotes the shared benefits of education for the region including economic development, social inclusion, and building climate resilience.

The Australia Awards is the Government's primary bilateral program enabling emerging leaders across the Pacific region to study in Australia, the Pacific and Papua New Guinea (PNG). They offer high-potential scholars the opportunity to undertake study, research, and professional development in Australia, the Pacific and PNG, building lifelong connections to Australia and between countries in the region.

Australia has longstanding connections with Southeast Asia—through ties between our people, economies, and support for an open, stable, and prosperous region. The *Southeast Asia Economic Strategy to 2040* (SEA Strategy) sets out a pathway to increase Australia's two way trade and investment with the region including in education and skills. The Strategy highlights research collaboration, expanded offshore delivery, increased scholarships and mobility programs as potential mechanisms to increase engagement in the region.

The New Colombo Plan (NCP) further delivers against Government priorities to connect Australians with the Pacific and Southeast Asia. In 2023, 398 Australian undergraduates undertook NCP scholarships in 30 host locations, and 7,734 Australian undergraduates were supported by NCP grants to participate in mobility projects (for shorter-term study and work-based experiences) in 35 host locations.

Quality education is central to achieving Australia's human development objectives in the region, in line with Australia's International Development Policy. Australia's international development program is bolstering these efforts, with almost \$200 million in Official Development Assistance (ODA) in 2023-24 supporting education in this region. Our partnership activities range from policy reform to skills development, alongside our longstanding scholarships, fellowships and alumni programs.

The ASEAN Scholars Leadership Program (ASLP)

The ASLP provides a transformative 10-month leadership enrichment program for Aus4ASEAN scholars completing a master's level scholarship at an Australian university.

With the opportunity to engage at an intensity that suits their interest and availability, scholars have had access to a combination of online facilitated learning sessions, face-to-face leadership retreats and one-on-one leadership coaching.

Through a merit-based process, 5 of the scholars have also been supported to undertake an internship relevant to their field of study.

Beyond enhancing scholars' skills, networks, and readiness to take on leadership roles in their workplaces, communities and countries, the ASLP aims to forge links between leaders in the ASEAN region and Australia, strengthening people-to-people connections.

Domestic success and global influence

International education plays an important role in advancing Australia's global interests beyond our borders—contributing to a more informed, peaceful, prosperous and resilient region. International education helps to train the researchers of the future, contributing to closer trade and investment through enhanced people-to-people links and bolstering the research collaborations needed to pursue a clean energy future and ensure Australia's sovereignty.

Moreover, international education is a powerful tool for regional influence. As a key player in the region, Australia needs to leverage our education, skills and research partnerships to ensure regional cohesion and stability. As the *Southeast Asia Economic Strategy to 2040* outlines, "Australia's education sector is a national asset in our engagement ... integral to building enduring relationships and economic prosperity with the region." This is because international education creates "connections between people, institutions, and governments that can be used as building blocks for further cooperation".

International education also forms a core part of strategic engagement in the Pacific. Commencing in 2024, the Pacific Engagement Visa will increase permanent migration from the Pacific and Timor-Leste, growing the diaspora in Australia, strengthening people-to-people links, and encouraging greater cultural, business and educational exchange. Those selected will be able to apply for permanent residence to live, work and study in Australia.

International education therefore remains fundamental in advancing not only closer people-to-people links through student exchange, but by offering a crucial lever for achieving Australia's foreign policy goals.

Case Study: Australia-Vietnam international education relationship

Australia is a leading education destination for Vietnamese students, with more than 38,000 Vietnamese students studying in Australia in 2023. Vietnam is also Australia's fifth largest market for international student enrolments. We collaborate bilaterally on many education and training initiatives, including in quality assurance, qualification recognition, research collaboration and vocational education; facilitating institution-to-institution partnerships; and supporting vibrant Australian alumni associations.

The new Comprehensive Strategic Partnership between Vietnam and Australia will further bolster education cooperation and we continue to support efforts to build enduring relationships between our universities, especially in relation to increasing exchange of students and staff, and collaboration in research and innovation, as well as supporting Vietnam's university governance and internationalisation reform agenda. We are also working with Vietnam to enable more Australian universities to have a presence in Vietnam and a joint Working Group has been established to support this particular objective.

To further strengthen collaboration in knowledge and innovation, Australia and Vietnam have established the Vietnam-Australia Centre at the Ho Chi Minh National Academy of Politics in Hanoi. The Centre draws on Australian expertise to support Vietnam's future leadership, while enabling Vietnam and Australia to pursue solutions to shared national and regional challenges and deepen people-to-people and institutional links. It brings together influential Vietnamese and Australian leaders, government officials, experts and academics.

Through Aus4Innovation, Australia and Vietnam are together exploring emerging areas of technology and digital transformation, trialling new models for partnerships between public and private sector institutions, and strengthening Vietnamese capability in digital foresight, scenario planning, commercialisation, and innovation policy. Aus4Innovation is a collaboration between the Department of Foreign Affairs and Trade, CSIRO and Vietnam's Ministry of Science and Technology. It is funded through Australia's development program.

Questions for sector consultation

1. What factors should inform government's approach to allocating international student enrolments across sectors, providers, and locations in Australia?
2. What considerations for government should inform the overall level of international students in Australia?
3. How will this approach to managing the system affect individual providers?
4. Should sectors other than higher education and vocational education and training, such as schools, ELICOS and non-award be included in approaches to manage the system for sustainable growth?
5. How should government determine which courses are best aligned to Australia's skills needs?
6. How should government implement a link between the number of international students and an increased supply of student housing?
7. What transition arrangements would support the implementation of a new approach?

Objective 3: Taking Australian Education and Training to the World

The Australian Government is focused on building Australia's economic prosperity and social wellbeing by creating opportunities and driving positive outcomes through access to high-quality education and training. Australia is embracing the opportunities to build a sustainable and diverse international education sector through high-quality and innovative delivery models, including transnational education (TNE).

International education is a key enabler for Australia's strategic partnerships and plays a key role in advancing our foreign policy objectives in our region and beyond. Education is a cornerstone of Australia's global reputation and government-to-government relationships, and it underpins our engagement in key global fora.

As a world leader in the delivery of high-quality education, Australia must look to maximise high-quality and sustainable offshore TNE market opportunities and take our education and training to the world.

Transnational Education

Australia is seen as an attractive destination for students seeking an international education. In charting a new course for Australia's international education sector and managing future growth, it is well placed to capitalise on market opportunities and take Australian education and training to the world through diverse and innovative TNE delivery modes.

TNE further provides students with an alternative and flexible option to reap the benefits of an international degree. Now more than ever, students are studying offshore with Australian providers. The flexibility of TNE programs makes them particularly attractive to mature students, students in employment and students who may not be able to travel for health reasons. In a post-pandemic world, TNE stands out as being a transformative force in shaping a more inclusive and culturally diverse society.

Australia is a desirable international education destination within the Indo-Pacific region due to its geographic positioning, strong quality offerings, high rates of student satisfaction and close neighbourly ties.

Within our region and beyond, there is untapped potential to support both capacity development and local demand for education. Latin America is another diversification region outside our immediate neighbourhood that has seen long-standing investment in market development from the Australian Government.

The Government's Education and Research Offshore Counsellor Network, through the Department of Education, plays a leading role in advancing the policy settings and international relationships providers require in key regions to deliver in a global market. Ensuring recognition of Australia's qualifications and supporting other countries' alignment with our policy frameworks helps remove barriers to TNE for Australian providers and opens new market opportunities.

Marketing and promotion are integral to enabling increased offshore delivery of Australian education and skills. As the Australian Government agency with responsibility for marketing and promoting Australian education and skills globally, the Australian Trade and Investment Commission, known as Austrade, helps Australian education and training providers to grow and diversify their export markets. Austrade promotes Australian education and training to prospective international students in their home countries.

There is strong groundwork and experience with Australian universities already establishing branch campuses overseas and a growing body of collaborative partnerships reflecting diverse TNE delivery modes. We can build

on the strength of Australia’s education and training system with our key partner countries and leverage the alignment of our respective education systems to address critical skill needs and common objectives.

Australian providers have demonstrated records of innovation and creativity. During the COVID-19 pandemic, providers rapidly expanded their delivery options to offer students the flexibility to study at home, with the support of their family, whilst borders were closed. Building on this innovation, the sector continues to embrace opportunities to expand the international education and training market.

Australia has long been a leader in TNE delivery, with the focus shifting from one of early growth and adoption, to one centred around sustaining impact. Leveraging the lessons learned historically, as well as those more recently through the COVID-19 pandemic, Australian education and training providers are in an enviable position and well-primed to take the benefits of a high quality educational experience to the world.

There is no internationally accepted definition of TNE. In Australia, it refers to the delivery of programs and courses to students living outside of Australia. Broadly, there are two overarching models by which Australian providers can deliver TNE: the traditional offshore TNE (i.e. offshore campus and joint delivery partner models) and the more recently embraced online TNE. Other hybrid models exist and will continue to emerge as academics and providers experiment and test new technologies and methods to facilitate education delivery in this fast-moving space.

Snapshot of some TNE delivery models

Branch Campus	Franchise Arrangement	Twinning Arrangement	Online
An Australian provider establishes a bricks and mortar campus in another country to offer programs and qualifications. Branch campuses may be fully or jointly owned by the Australian institution.	An Australian provider authorises a foreign provider to offer, either as a whole or in part, an approved program of study. The Australian provider supplies the syllabus to be delivered by the foreign provider.	An Australian provider and foreign provider partner to offer arrangements where students complete the first component of the qualification offshore before completing their studies in Australia. This may result in a joint or double degree.	An Australian provider delivers education directly to students anywhere in the world through the internet.

Case Study: RMIT collaboration on cyber security and digital skills in Indonesia

RMIT is delivering the digital skills of tomorrow in Indonesia's Nongsa Digital Park in Batam, through a strategic partnership signed in 2021 with local partner Infinite Learning. Through the partnership, RMIT has been delivering intensive cyber security short courses to the local workforce in Batam since 2022. In August 2023, the partnership was expanded to deliver a games design and development short course.

Case study: Monash University helping meet education demand in the region

Monash University's campus in Jakarta (Monash University International) was established in 2021 as Indonesia's first international, foreign-owned university. In addition to Masters and PhD programs, Monash Jakarta partners with industry on training and research to help address pressing challenges facing Indonesia's economic and technological development. The campus is a prime example of how Australian TNE can support the global innovation needs of tomorrow. For example, in response to Indonesia's plans to build the new capital city Nusantara, Monash University International will deliver courses in public policy and management, business innovation, cyber security and public health to Indonesian scholars as part of the Australia Awards Nusantara Scholarships.

TNE Pilot – Collaborative Online International Learning (COIL) in Colombia

A cultural shift has occurred with online learning in Latin America. There are new models of international education collaboration which create new opportunities for Australian providers to develop and foster relationships in Latin America, deepening mutual understanding and enabling long-term diversification. Australia is actively engaged with Brazil and Colombia to share expertise in quality assurance of online learning, paving the way for Australian providers to increase delivery in the region.

To encourage stronger higher education partnerships between Australia and Colombia, the Department of Education has supported a pilot project to connect providers in both countries to develop and deliver a COIL project for their students. COIL is a means to accelerate the TNE journey, embedding TNE-like approaches into the mainstream and providing a platform for TNE development.

The pilot has facilitated six new partnerships and early feedback has highlighted how the online model can be leveraged to overcome distance and to support provider collaboration. Through the pilot, providers are able to offer international education experiences as part of the curriculum and develop linkages that open the door to longer term collaboration.

New and strengthened transnational education partnerships

Australia is a leader in international education and is widely recognised for the quality of its education providers across higher education, vocational education and training, English language and schools.

The quality of our education sector means it is well placed to capitalise on opportunities for online delivery. Australia's proximity to key markets and shared time zones with Asia are advantages for enabling synchronous communication, service and support to students.

Australia can advance beyond establishing international branch campuses and partnerships, to embrace innovative TNE models underpinned by quality, integrity and sustainable impact. For some markets, the establishment of international branch campuses may still be the best option to address skills shortages and benefit respective economies.

Government encouragement of innovation

In the past two decades, Australian education providers have developed sophisticated and successful approaches to the provision of education to students located outside of Australia. The scale and scope of TNE delivery, including the range of partnerships and types of delivery models, is diverse and continues to evolve.

The Government is also ensuring the quality and integrity of Australia's education system by supporting the sector to mitigate the risk of foreign interference. Foreign powers continue to seek to interfere in the sector in pursuit of commercial or strategic interests.

In 2023, the Transnational Education Working Group of the University Foreign Interference Taskforce developed guidance for universities engaging in TNE arrangements. This guidance established a range of counter foreign interference considerations that universities may consider when assessing the complexity of operating offshore, online or through international partnerships (including multi-party and commercial arrangements). The Government is continuing to ensure the sector builds awareness of and resilience to foreign interference risk.

Expanding recognition of Australian qualifications internationally

Australian qualifications are increasingly recognised all over the world. Qualifications recognition is a fundamental enabler of student, graduate, academic and worker mobility. It underpins partnerships, linkages and collaborations both regionally and globally.

Certain modes of TNE delivery are also affected by a lack of recognition, requiring greater cross-border dialogue and cooperation.

The Government actively leads engagement with our strategic partners to promote best principles and practices for qualifications recognition. This minimises barriers to the recognition of Australian qualifications, which in turn promotes student and graduate mobility.

By continuing to work with strategic partners, Australia is influencing recognition systems to align with international best practice. Australia is also addressing the policy settings which impede the recognition of Australian qualifications and the expansion of Australian education delivery offshore. Engagement in this field also increases education cooperation more broadly. This includes supporting strategic partners to develop qualifications frameworks and quality assurance systems, which underpin our education and training system.

Australia was a key champion in the development and adoption of the United Nations Educational, Scientific and Cultural Organization (UNESCO) *Global Convention on the Recognition of Qualifications concerning Higher Education 2019* (Global Convention), helping to secure ambitious provisions for the recognition of quality assured online learning, offshore campus delivery and joint degrees, as well as other innovative forms of education delivery, vital to the new era of education.

The UNESCO recognition conventions remain Australia's preferred mechanism for cooperation on qualifications recognition. They offer an effective, efficient, and sustainable treaty level framework based on best principles and practices to support the recognition of overseas qualifications and student mobility.

Mining in Latin America

The Government is working with the training sector to pilot vocational training courses and micro-credentials based on occupational standards for in-demand mining jobs in Argentina, Chile and Mexico.

The pilot will deliver products that are broadly aligned to the Australian system. This will facilitate both offshore delivery by Australian VET providers as well as recognition of skills for migration purposes to Australia or across Latin America.

The pilot will also support Australian mining companies to access the skills they need to operate developed through trusted providers.

Spotlight: Australia-India International Education Relationship

A Partnership for the Future: Australia's Education Strategy for India

In November 2023, Minister Clare released *A Partnership for the Future: Australia's Education Strategy for India*. The strategy builds on our strong bilateral relationship and demonstrates to India that Australia is a committed education partner with deep ties and a clear vision for the partnership. Working together, Australia and India can be leaders in education, research, and technology in the region and beyond.

The three pillars of the strategy are:

- Delivering mutual benefits through education
- Strengthening institutional partnerships and research collaboration
- Enhancing people-to-people links, mobility and employability.

The strategy is an opportunity to build partnerships and deliver quality education that contributes to India's economic growth while also educating Australia's and India's future workforces.

Australia India Research collaboration

Australia has a diverse span of research partnerships with India, with ever increasing research outputs in biomedical and clinical sciences, engineering, biological sciences, health sciences, and information technology. A long-term, high-quality, and impactful research collaboration between our two countries ensures a strong research workforce prepared to tackle humanity's future challenges, such as climate change and food and water security. The Australian Government continues to support research capacity building, with the Department of Education funding two important programs:

The ***Australia India Research Student (AIRS) Fellowships*** were announced at the sixth Australia India Education Council (AIEC) during Minister Pradhan's visit in August 2022 and implemented in 2023. The program supported Australian and Indian research students and early career researchers to undertake short-term placements. It enhanced researcher networks, broaden collaboration, and strengthen academic mobility between Australia and India, further deepening the research excellence of both countries. A total of 59 fellowships were awarded to research students and early-career researchers: 33 Indians and 26 Australians.

The ***Australia India Unnati Research Collaboration Grants Program***, announced at the sixth Australian International Education Conference (AIEC) during Minister Pradhan's visit in August 2022, enhanced existing research projects or provided seed funding to promote new opportunities and encourage collaboration with India in four targeted sectors. The Australia India Unnati Research Collaboration Grants boosted and deepened research collaboration between Australia and India. Twelve Australian researchers across nine universities were awarded grants of up to AUD\$30,000. They were supported by Indian partners from more than 20 higher education institutions, research centres and industry.

Mechanism for the Mutual Recognition of Qualifications between Australia and India

On 2 March 2023, Minister Clare and Minister Pradhan, Minister for Education and Skill Development and Entrepreneurship in the Government of India, signed the *Mechanism for the Mutual Recognition of Qualifications between Australia and India* (the Mechanism). The Mechanism is the most comprehensive qualification recognition agreement India has ever announced, and has been well received by stakeholders in both countries.

The Mechanism commits Australia and India to recognise secondary and post-secondary education qualifications to facilitate access to higher education and for general employment.

Australia's education sector benefits through greater diversification and optimised mobility outcomes. For Indian nationals, the Mechanism will deliver greater confidence that they can study at Australian institutions and use their Australian qualification in India to pursue further study and public sector employment.

Importantly, it secures the recognition of qualifications gained through transnational delivery, paving the way for streamlined entry of Australian providers to India.

Skills Strategy for India

In November 2023, Minister O'Connor announced the Government's commitment to develop a Skills Strategy for India, at the inaugural Australia India Education and Skills Council (AIESC) meeting. This Strategy will provide a roadmap for deepening skills engagement with India, informed and supported by the Australian and Indian VET sectors.

TNE innovation - Australia and India

Australia is committed to supporting the Indian Government's National Education Policy 2020 agenda to have 50 per cent of its learners through school and higher education, including vocational education and training, by 2035. Collaboration between our two nations continues to move from strength to strength with India implementing transformational regulations, allowing for the first time joint delivery of degrees by Australian higher education providers and the establishment of foreign campuses.

In May 2022, the University Grants Commission (UGC) approved regulations that allow Indian and foreign universities to offer twinning, joint and dual degrees:

- Twinning programs – final qualification is awarded by the Indian university, but part of their program is undertaken offshore with a foreign university.
- Joint degree program – the curriculum is designed by both the collaborating Indian and foreign universities. Upon completion of the course, a single joint degree qualification is awarded.
- Dual-degree programs – programs offered by both the Indian and foreign university in the same subject area and at the same qualification level. Two qualifications are awarded – one by the foreign university and one by the Indian university.

In November 2023, the UGC also approved regulations that allow the establishment and operation of foreign university branch campuses in India. The regulations also regulate the entry and operations of foreign universities/institutions in India to conduct certificate, diploma, degree, research, and other programs at the undergraduate, postgraduate, doctoral, and post-doctoral levels.

In 2022, India allowed foreign universities to establish in Gujarat International Finance Tec-City (GIFT City) to provide skilling solutions for companies in the area. Campus developments demonstrate Australia's higher education sector is a committed partner for Indian industry in developing skilled workforces. Now Australian universities will be able to establish branch campuses in other areas of India.

The University of Wollongong and Deakin University were not only the first Australian universities, but the first foreign universities to establish campuses in India.

- The University of Wollongong GIFT City campus will offer postgraduate courses in computing, finance and financial technology in 2024, and undergraduate courses in business and computing science in 2025. The University of Wollongong has strong and ongoing relations with India through strategic research collaborations in the fields of 3D bioprinting, transportation, and advanced medicine solutions.
- Deakin University has been a leader in building Australia-India relations over the past 30 years. Deakin's GIFT City campus will start teaching in 2024 and initially offer postgraduate courses in cybersecurity and business analytics. It will then expand to other degrees from the faculties of Science, Engineering & Built Environment and Business & Law.

The opportunity for Australian providers to establish campuses in India both in and beyond GIFT City will further strengthen bilateral relationships. The first-mover response from Australian providers to opportunities in GIFT City, the development of joint programs, and establishment of foreign branch campuses in India, has seen Australia move ahead as India's key partner of choice in education.

Questions for sector consultation

1. What are the barriers to growth in offshore and transnational delivery of Australian education and training?
2. Where can government direct effort to support transnational education?

Next Steps

This Strategic Framework marks a significant shift for Australia’s international education sector. Government invites views from the sector and interested parties on the issues raised ahead of finalising the Strategic Framework later in 2024.

Australia is a highly sought after destination for international education for students from all over the world. This reflects the quality of our education providers, teaching and learning facilities, and the varied and unique experiences available for students in Australia.

The Government is committed to the careful management of Australia’s international education sector, and to strengthening its quality, integrity and reputation. We seek to shape a sector which is sustainable in the long-term and which plays a leading role in delivering on Australia’s national objectives. Enhancing the quality and integrity of the sector, strongly aligning education outcomes with areas of skills needs, and continuing to build our innovative delivery models are just some of the key measures that will help advance Australia’s position as a world leader in education.

We are dedicated to supporting international students, and to acknowledging the significant contributions they make to our nation’s cultural and social fabric. The perspectives and diversity that onshore students bring to Australia are valued, which is reflected in the initiatives aimed at ensuring they have a high-quality student experience and access to safe and affordable housing. By keeping the student at the centre of the international education system, we can focus agent and provider behaviours on delivering quality services and acting with integrity.

Australia’s international education and training sector is a success story. The Strategic Framework identifies some of the remarkable partnerships, agreements, and broader strategic outcomes we have generated with educational partners and students worldwide. That many of these outcomes were achieved during the pandemic amidst a rapidly changing and unpredictable environment highlights our capacity for collaboration, exchange and innovation—qualities that will continue to shape the sector into the future.

Appendix A: Recent reviews and reforms with strategic implications for the international education and training sector

Review and Reforms	Implication for International Education
<p>Quality and Integrity – the Quest for Sustainable Growth: Interim Report into International Education.</p> <p>Joint Standing Committee on Foreign Affairs, Defence and Trade Parliamentary Inquiry into Australia’s Tourism and International Education Sectors</p>	<p>The interim report focuses on the challenges and opportunities presented to the international education sector.</p> <p>The report highlights:</p> <ul style="list-style-type: none"> • The value of international education students beyond just economic value. • The importance of soft power diplomacy and workforce skills. • How international education can source the best and brightest international graduates to support solutions for Australia’s skills shortages. • The future of skilled work pathways including work integrated learning. • The international student experience and the benefits that these students bring to Australia, including the importance of their cultural diversity. • The cost-of-living pressures and options for student accommodation. • Challenges around data sharing between agencies and organisations. • Challenges for the registration of education agents and how it could be improved.
<p>Australian Universities Accord Final Report</p>	<p>Strengthening Australia’s international education sector was an important focus for the Australian Universities Accord, with the Panel recognising the significant contribution international students make to the economy as well as Australia’s relationships with key partners.</p> <p>The Final Report provided recommendations to:</p> <ul style="list-style-type: none"> • Address issues with quality and integrity of the sector and ensure that international education providers maintain their social licence to operate. • Better align courses to the national skills agenda and migration initiatives. • Support growth of international education in regional and remote areas. • Explore opportunities to support diversification of student markets, including transnational education. • Enhance alumni engagement.

Review and Reforms	Implication for International Education
<p>Working Future: The Australian Government’s White Paper on Jobs and Opportunities (Employment White Paper)</p>	<p>The Employment White Paper sets out the Government's roadmap for the Australian labour market. It lays the foundation for a more robust and equitable labour market, poised to meet the evolving demands of the future for the benefit of all Australians. For Australia’s national training system in particular, the White Paper highlights the importance of:</p> <ul style="list-style-type: none"> • an adaptable VET system that responds to emerging skills needs, • ensuring that the VET, higher education and migration systems are working together to tackle skills challenges in a co-ordinated way, • the critical role of Jobs and Skills and Australia in providing labour market forecasting to support education and training policy for the future, and • the importance of foundation skills, high quality careers advice, and breaking down barriers to lifelong learning. <p>The White Paper supports the key role that Australia’s training system plays in supporting labour market outcomes for priority cohorts, such as First Nations people, women, and students with disability, by reducing barriers to workforce participation.</p>
<p>Invested: Australia’s Southeast Asia Economic Strategy to 2040</p>	<p>The strategy outlines a practical pathway to significantly increase two-way trade and investment between Australia and Southeast Asia, including through education and skills to deepen our engagement. Recommendations from the strategy focus on:</p> <ul style="list-style-type: none"> • Promoting and raising awareness of Australia’s education offerings across Southeast Asia to attract more Southeast Asian students • Removing blockages and maintaining Australia’s position as an education destination of choice • Building capability and enhancing enduring linkages between Australia and the region, including economic and people-to-people connections • Deepening investment in research collaboration with Southeast Asian countries, including research grants.
<p>A Partnership for the Future: Australia’s Education Strategy for India</p>	<p>This strategy demonstrates the committed education partnership between India and Australia and a clear vision for the partnership going forward, including:</p> <ul style="list-style-type: none"> • Delivering mutual benefits through education. • Strengthening institutional partnerships and research collaboration. • Enhancing people-to-people links, mobility and employability. <p>The strategy was developed to complement and build on the education recommendations of the <i>India Economic Strategy 2018</i> and the Update to the <i>India Economic Strategy 2022</i>.</p>

Review and Reforms	Implication for International Education
National Defence: Defence Strategic Review 2023	<p>The strategic direction and key findings from the Defence Strategic Review will strengthen Australia's national security and ensure Australia's readiness for future challenges.</p> <p>Australian statecraft now requires a consistent and coordinated whole-of government approach to international affairs and the harmonisation of a range of domestic and external national security portfolios, from trade and investment to education, minerals and resources, clean energy, climate, industry, infrastructure and more.</p>
Rapid Review into the Exploitation of Australia's Visa System (Nixon Review)	<p>The Government response to the Nixon Review includes:</p> <ul style="list-style-type: none"> • Recommendation 13: The Minister for Education will consider how to strengthen provider accountability, boost data sharing activities supporting regulation, and examine the existing legislative framework. <p>This will include action by the Minister for Education in banning commissions paid by providers to education agents for onshore student transfers, and further measures deterring collusive behaviour between providers and agents in exploiting Australia's education and migration systems. These reforms will be supported by legislative amendments to increase provider access to agent performance data and strengthen provider reporting obligations for the education agents they work with.</p> <ul style="list-style-type: none"> • Recommendation 16 and 17: The Department of Education will work across government agencies and relevant regulators to develop risk indicators as a whole-of-system approach to identifying risk and improving compliance and driving target regulatory action, including work across government agencies and relevant regulators to consider how to enhance compliance with reporting and monitoring nonattendance.
Review of the Migration System 2023 (Migration Review) and Migration Strategy	<p>The Migration Strategy outlines the Government's vision for getting migration working for the nation and building a migration system that delivers for students, workers, businesses and all Australians.</p> <p>Strengthening the integrity and quality of international education is one of 8 key actions. Student visa reforms ensure only genuine students and education providers have access to Australia's international education sector. Reforms include:</p> <ul style="list-style-type: none"> • Increasing English language requirements to improve the quality of students' educational experience and reduce workplace exploitation. • Applying greater and more targeted scrutiny to student visa applications from high-risk providers. • Bolstering the student visa integrity unit in the Department of Home Affairs to reduce misuse of Australia's student visa system. • Strengthening requirements for international education providers. • Restricting onshore visa hopping that undermines system integrity and drives 'permanent temporariness'. • Strengthening and simplifying Temporary Graduate visas.

Review and Reforms	Implication for International Education
Critical Minerals Strategy 2023-2030	International education enables the implementation of the <i>Critical Minerals Strategy 2023-2030</i> by helping to build on our existing investment in skills and education to increase the number of highly skilled specialists available for critical minerals projects.
2023-2030 Australian Cyber Security Strategy	International education aids in implementing the <i>2023-2030 Australian Cyber Security Strategy's</i> recommendation on growing and professionalising our national cyber workforce.
Thrive 2030: The re-imagined visitor economy strategy	International education also assists in implementing Australia's visitor economy priorities, including action 6.7 of <i>Thrive 2030: The re-imagined visitor economy strategy</i> , which outlines the need to "support Australia's international education sector to attract students from diverse markets, grow offshore and online delivery and help meet Australia's future workforce needs".
Australia's International Development Policy	Australia will support our partners to expand education programs and build resilient cities and infrastructure.