

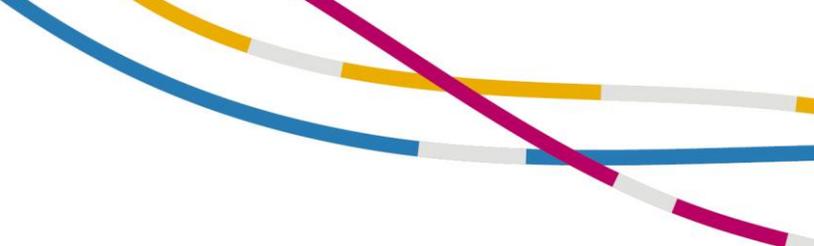


Australian Government
**Department of Education,
Skills and Employment**

Connected, Creative, Caring: Australian Strategy for International Education 2021-2030

Consultation Paper

March 2021



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WHY IS NOW THE RIGHT TIME FOR A NEW STRATEGY?

COVID-19 significantly affected Australia's international education sector in 2020, with border closures and prolonged disruption to our partner country economies hindering student mobility flows globally. Our institutions are facing a drop in onshore student numbers that will continue for some years to come.

The international education sector has responded swiftly, becoming more innovative and agile – qualities needed well beyond the immediate pandemic. Education delivery moved quickly online to adjust to the health conditions, making investments in education technology to support a high-quality experience across all sectors, from schools to universities and colleges. The Australian Government supported providers to make these shifts by reducing regulatory obligations and minimised administrative burdens, in turn allowing study flexibility for students facing hardship.

The effects of COVID-19 will be felt for coming years, both in Australia and across the globe. The economic and social impacts of the pandemic will affect many of the countries where students are attracted to studying in Australia. The full impact is unknown and is likely to vary between countries and economies. This will drive a need for the international education sector to look at new ways of educating students and building new partnerships to manage these changes.

Uncertainty remains around the length of this disruption, while the Commonwealth, and state and territory governments continue to work on plans for the safe return of international students. The sector will need to continue to work together to support plans when conditions allow.

However, the pandemic is not the only reason for a new strategy. Innovations in education delivery, the rebalancing of global political and economic power, and challenges to the sector's sustainability were already transforming the way we thought about international education. COVID-19 has sharpened these challenges and highlighted the need to embrace new ways of engaging with students locally and overseas for Australia to remain globally competitive.

Compared to the strong growth in international student enrolments seen prior to 2020, the next few years may see a slowdown of new students looking to study overseas. Economic volatility in partner countries may affect many students' capacity to study overseas, while heightened competition globally will mean it is more important than ever for Australia to maintain its position as a top study destination and education partner.

Innovation and flexibility will be required across the sector to respond effectively to these challenges. A new *Australian Strategy* is an opportunity for the Australian international education sector to set out a transformative agenda that will embrace emerging opportunities and consolidate Australia as a trusted global partner of choice in international education, training and research.

Introduction

Our story

International education is one of Australia's great success stories. It is a key contributor to Australia's economic prosperity and has produced lasting diplomatic outcomes in our region. Over the last two decades more than three million students have benefited from our distinct, internationally recognised education and training.¹ Anchored in the Indo-Pacific region, Australia's international education sector prepares graduates to become business, political and social leaders; they are proud advocates for Australia with lasting connections to our institutions, communities, society and businesses. We are the third most popular destination for international education in the world,² with students and their families choosing Australia to prepare them for the future.

International education in Australia plays four key roles.

Firstly, it enhances Australia's high-quality education system, enriching the experience of Australian students and placing them in a global context. International education benefits Australian students through an internationalised study environment and curriculum, through outbound mobility experiences and through the opportunities to learn valuable intercultural skills which help prepare our graduates for a globalised workforce.

Secondly, international education is well acknowledged for the economic benefits it delivers to individuals, education providers and to the wider community. Australia has benefited from almost a quarter of a trillion dollars in export income in the last ten years driven by this sector.³ In 2018, international education created 250,000 jobs in education and in related service industries such as accommodation, retail and education-related tourism.

Thirdly, this sector contributes to the development of human capital in Australia and overseas. Graduate outcomes and improved employability from quality international education experiences are important to international and domestic students in preparing them for a rapidly changing job market. International education in Australia can play an important role in meeting skills needs across the world, including the whole spectrum of supply chains that underpin Australia's export and import sectors.

Finally, international education advances Australia's social and cultural development. It embeds deep social connections, entrepreneurial advancements and diversity of experiences in our communities and across the Indo-Pacific. International research collaboration has driven innovation and new discoveries, vital in an increasingly interconnected and competitive world. This creates significant opportunities for worldwide knowledge and innovation exchange, building Australia's reputation as a knowledge partner of choice.



¹ Department of Education, Skills and Employment (DESE), International student data, YTD December 2020.

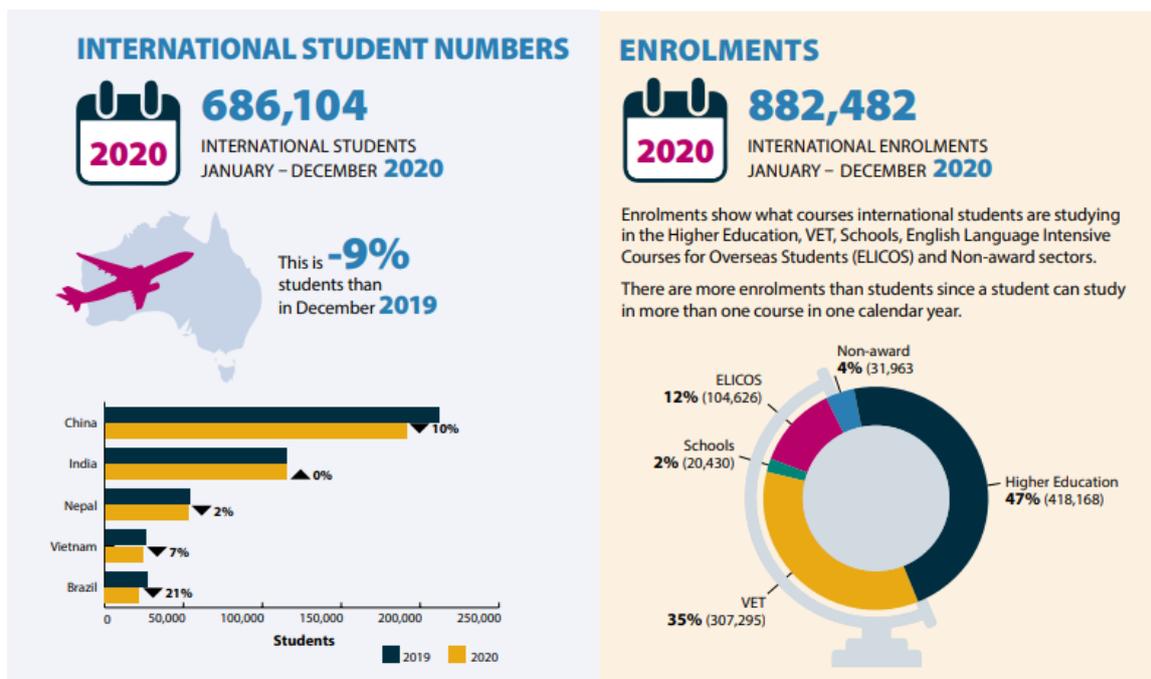
² Organisation for Economic Cooperation and Development (OECD), Education at a Glance 2020, September 2020.

³ From 2010-19, education services exports have totalled around \$AUD244 billion, ABS Education services export data.

Our context

There is no doubt that COVID-19 directly impacted the international education sector. While the closure of Australia's borders has been critical to the successful management of the spread of the virus, it has presented many challenges with effects most likely to continue to be felt in 2021 and beyond.

Summary of international student numbers and enrolments (latest data as at YTD December 2020)



Source: International Education data, Department of Education, Skills and Employment, YTD December 2020

The disruption of the pandemic affected student enrolments to varying degrees. By December 2020, enrolments in higher education dropped by 5 per cent, while enrolments in VET increased by 9 per cent, driven by many onshore students, who have continued their studies or transferred providers or courses. Some of these enrolments have come from students who were unable to return to their country due to travel restrictions. Enrolments also dropped in traditional pathway sectors such as ELICOS (33 per cent), schools (20 per cent) and in non-award courses (34 per cent).⁴ Declines in these sectors will flow onto others as many students go on to study tertiary education in Australia after their original courses. This may lead to disrupted enrolment trends in sectors such as higher education and vocational education over the medium-term.

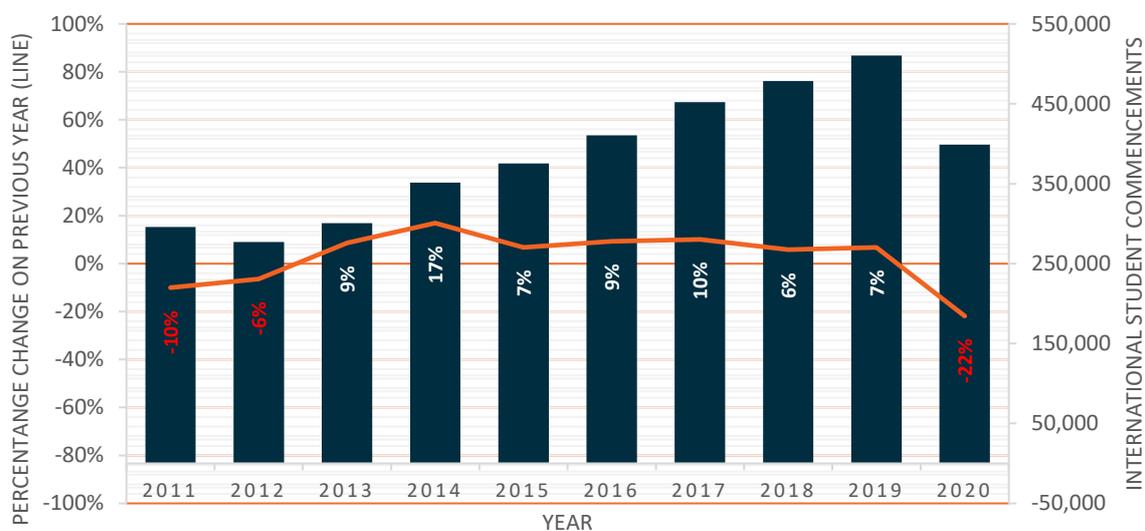
It is not just enrolment figures that matter – student commencement numbers illustrate a broader challenge facing the sector over the coming years. Australia's student pipeline – the number of new students commencing courses with Australia – is slowing and as current students gradually finish their courses, Australia's overall student enrolments will likely drop. To December 2020, commencements from China (Australia's largest student source country) declined by 26 per cent, while commencements from the rest of the world declined by 21 per cent, resulting in an overall global commencement decline of 22 per cent.⁵

⁴ DESE, YTD December 2020.

⁵ DESE, YTD December 2020.

In 2020, the top five student source countries remained China (28 per cent of all students), India (17 per cent), Nepal (8 per cent), Vietnam (4 per cent) and Brazil (3 per cent).⁶ However, as pipelines continue to be disrupted and the effects of COVID-19 are still being felt, the diversity of Australia's student intake may change. Many students' capacity to pay or travel for overseas study may be affected due to increased economic volatility in their home countries, increased flight prices or suitability of local alternatives. Recent research also suggests that some international students intending to study in Australian universities may consider switching to another destination if it means they can resume face-to-face learning sooner, indicating further disruptions to the sector.⁷

INTERNATIONAL STUDENT COMMENCEMENTS YTD DECEMBER 2011-2020



Source: International Education data, Department of Education, Skills and Employment, YTD December 2020

Student visa numbers also illustrate continued disruptions. Visas granted dropped 40 per cent in the year to date December 2020.⁸ At the end of 2020, 29 per cent of primary student visa holders remained outside Australia, many from China.⁹ While borders remain closed for international students to travel to Australia, it is estimated that between 18 and 23 per cent of enrolments are students outside Australia studying online.¹⁰ Visa applications restarted in July 2020, which has indicated some recovery of student demand, however application numbers are lower than in previous years.¹¹ Preliminary data on education services exports arising from international students studying in Australia in 2020 was \$31.5 billion, a decline of 22 per cent on 2019.¹² There was also an additional \$1.44 billion paid as tuition fees from students studying outside Australia due to travel restrictions

⁶ DESE, YTD December 2020.

⁷ IDP Connect Crossroads III, International student choices and motivations increasingly driven by the availability of face-to-face teaching, 18 November 2020.

⁸ COVID-19 impacts on resourcing priorities and third-party services such as health, English language and biometrics checks also contributed to the decrease in visa grants.

⁹ Department of Home Affairs, Student visa data, 13 December 2020.

¹⁰ Estimate determined by analysing enrolments data on one day, 15 November 2020, where there were 502,202 international student enrolments (compared with 586,724 on 15 November 2019) and between 18-23 per cent of those enrolments were students outside Australia, Department of Education, Skills and Employment, International student data, YTD November 2020.

¹¹ Department of Home Affairs, Student visa data lodgements, 28 January 2021.

¹² Australian Bureau of Statistics (ABS), International Trade in Services, Credits, Financial Year by Country & Travel, December 2020.

between January-June 2020.¹³ Data shows us one part of the picture, that COVID-19 will continue to pose significant challenges to the international education sector over the medium term.

In the face of these challenges, the sector has demonstrated innovation, flexibility and resilience. Due to COVID-19 many international students were hit hard, losing jobs and facing the potential end to their studies in Australia. The pandemic drove Australian education providers to invest widely in online education technology, providing affected students with the ability to continue their studies online, and highlighting opportunities for growth and diversification in new modes of education delivery.

The Australian Government, along with state and territory governments and education providers, all remain committed to providing high quality education and living experiences for all students, strengthening the regulatory fundamentals to support the resilience of the sector, and providing the much-needed support for Australia's economy to recover from the pandemic. As we enter the next era of Australia's international education sector, new ways of approaching education will be fundamental to the sector's resilience. Expanding our focus to new models of education – whether they be online, overseas or blended – will maintain and improve Australia's global standing in a world where students' and industry needs will evolve rapidly in new and unexpected ways. This will include ensuring Australia's education system can be innovative and responsive to domestic and global industry linkages.



International education is an integral part of Australia's economic landscape, supporting small and medium enterprises across an array of auxiliary industries.

Council for International Education

The Council for International Education (Council) was established in 2016 to drive and support the implementation of the *National Strategy for International Education 2025* and the *Australian International Education 2025* (AIE2025) market development roadmap. These strategies were designed to strengthen Australia's role as a global leader in education, training and research.

Council membership consists of experienced international education experts and practitioners (Expert Members) and Australian Government ministers (Ministerial Members) with portfolio responsibilities in international education. Since its formation, Expert Members have established working groups to take forward work in priority areas and provided leadership through taskforces and stakeholder roundtables.

¹³ ABS 2020. Note: ABS defines this as 'correspondence courses'. Full year data for 2020 is expected in May 2021.

Ministerial Members

- The Hon Alan Tudge MP, Minister for Education (Chair)
- Senator the Hon Marise Payne, Minister for Foreign Affairs and Minister for Women
- The Hon Dan Tehan MP, Minister for Trade, Tourism and Investment
- The Hon Alex Hawke MP, Minister for Immigration, Citizenship, Migrant Services and Multicultural Affairs
- The Hon Stuart Robert MP, Minister for Employment, Workforce, Skills, Small and Family Business
- The Hon Christian Porter MP, Minister for Industry, Science and Technology

Expert Members

- The Hon Phil Honeywood – CEO, International Education Association of Australia (Convener)
- Malcolm Baigent – Executive General Manager, University Partnerships Australasia, Navitas
- Professor Helen Bartlett – Vice Chancellor, University of the Sunshine Coast
- Janelle Chapman – Executive Director, TAFE Queensland International
- Karyn Kent – CEO, StudyAdelaide
- Professor Linda Kristjanson AO
- Belle Lim – President, Council of International Students Australia
- Kathleen Newcombe – CEO, Sarina Russo Group of Companies
- Derek Scott – Principal and CEO, Haileybury
- Professor Michael Wesley – Deputy Vice-Chancellor (International), The University of Melbourne
- Professor Heather Cavanagh (completed her role as Expert Member in February 2021)

The National Strategy for International Education 2025

Australia's [*National Strategy for International Education 2025*](#) (the National Strategy) enabled the international education sector to be more innovative, future-focused and globally engaged.

The National Strategy was designed to further strengthen our international reputation for high quality education and training, drive collaboration in education and research, and increase opportunities for Australian providers and communities.

The National Strategy consolidated Australia's place as the third most popular destination for international students in the world.¹⁴ It saw the expansion of the sector's export revenue from \$18.5 billion in 2013-14, the financial year prior to the National Strategy's release, to \$37.5 billion in 2019-20.¹⁵ Under the National Strategy, Australia established itself as a world leader in innovative data collection and analysis through measures to increase the transparency and accountability through the publication of education agent data and became the only country to regularly collect data on offshore student enrolments.¹⁶ The National Strategy also drove awareness of Australia's high-quality system across the world, including through Australia's development and leadership in the *UNESCO Global Convention on the Recognition of Qualifications concerning Higher Education* and by supporting systemic reform in higher education funding arrangements in South East Asia and Latin America.

¹⁴ OECD, September 2020.

¹⁵ Australian Bureau of Statistics, International Trade in Services, Credits, Financial Year by Country & Travel, 20 November 2020.

¹⁶ Melbourne Centre for the Study of Higher Education, Australia's higher education delivery offshore and online – trends, barriers and opportunities, 2021.

A new Australian Strategy to 2030

The new international education strategy is being developed to guide the sector over the next decade in the context of unfolding geopolitical challenges, increased global competitiveness and economic unpredictability.

This consultation paper sets out the proposed vision, goals and immediate priorities for the international education sector over the next decade. This paper has been developed by the Expert Members of the Council for International Education in collaboration with the Department of Education, Skills and Employment (DESE).

A new strategy seeks to build on the role of the international education sector to deliver strong benefits to Australian and international students, and to our society and economy. International education plays a complementary role in enriching the education of Australians and producing knowledge that contributes to our country and the global challenges facing humanity. The institutional connections built through students and research in the international education sector bring diversity and innovation to our system.

Collaboration across the sector will be vital to ensuring the new Australian Strategy appropriately reflects and considers the long- and short-term opportunities, as well as issues and challenges facing the sector.

The Council welcomes written submissions from across the Australian international education sector and community and encourages stakeholders to engage with the development of the new Strategy. Information regarding the public consultation process and further opportunities for engagement will be available on the <https://www.dese.gov.au/international-education> website.

Delivering a distinctly Australian education for the future

Australian education is trusted for its ingenuity, drive to find solutions and focus on collaboration, talent and expertise. Australian graduates are characterised by a willingness to share ideas and think critically.

The Australian education eco-system is built on unrivalled government and private sector collaboration, driving continuous improvement in quality assurance, employability outcomes and student protections.

At the heart of our education and training system is our engagement with industry.

As the most successful multicultural society in the world, we lead in intercultural competencies and understanding. These attributes prepare our graduates to work anywhere in the world.

Connected, Creative, Caring:

An Australian Strategy for International Education 2021-2030

A vision for 2030

Australia aspires to consolidate our position as an effective, trusted global partner of choice in international education, training and research. Over the next ten years, *Connected, Creative, Caring: An Australian Strategy for International Education* (the Strategy) could drive this vision, enabling the sector to diversify its offerings, provide greater connections and opportunities for students, researchers and providers, and build a prosperous international education community in Australia and overseas.

To fulfil this vision, we must embrace and build on our strengths as well as drive improvement, innovation and ambition. The vision of the Strategy could aim to:

- deliver the best possible student experience for all students from pre-commencement to post-graduation employment outcomes and promote ongoing alumni engagement that fosters a lifetime connection to Australia
- build on our reputation for distinctly Australian education, research and training
- foster a diverse and sustainable sector, grounded in strong community support and intercultural understanding and acceptance
- build deeper connections between education providers and industry, including through strengthening research collaboration partnerships, to meet the needs of students, graduates and industry into the future
- embrace innovation and new technologies to enhance existing and new modes of delivery
- welcome and foster international connections and mobility for Australian students to gain the benefits of an international study experience.

A new way of delivering international education, research and training

As the effects of COVID-19 will continue to be felt over the coming years, we must consider opportunities to diversify the breadth and depth of Australia's education offerings. Doing so will support Australia's providers so they can continue to provide world-leading education experiences to students around the globe. Declines in Australia's onshore student pipelines are likely to lead to medium-term drops in student enrolments and the sector will likely not achieve the steady, continued growth of pre-COVID years for some time.

Meanwhile, future skills needs will evolve as advancements in technologies and digitisation create new ways of working. Students now and in the future will require innovative education experiences to meet these needs. To continue to compete globally in this changed environment, sustained innovation will underpin the sector's ongoing resilience. This could give

Modes of delivery for the next decade



Australian providers the mechanisms and settings necessary to compete, and students in Australia and overseas the choices, skills and experience they require.

Australia has the potential to be a world leader in online education and the new Strategy is an opportunity to explore innovative ways Australia can expand its footprint including digital delivery, blended learning, micro-credentials, stackable short courses and more, while maintaining our academic standards and reputation. The Strategy could also focus on opportunities for research students through boosting the research workforce, enhancing connections and contributing to global capability development and knowledge transfer. As such, the Strategy will place an equal emphasis on onshore, offshore, outbound, online and research modes of engagement.

Pedagogical innovation, industry needs, student expectations, increased competition and the integration of online education and training technology have highlighted new and existing challenges and opportunities. We have learned that Australian education, research and training are not dependent on students or research partners being in Australia. Online and blended delivery models are becoming more prevalent with more students studying online and offshore. Research partnerships are also benefiting from deeper online and transnational connections. Enabling providers to diversify their offerings and embrace new technologies could become a core part of the Strategy.

Our strategic priorities

The Strategy could develop on a coordinated approach to sustaining growth, driving innovation and delivering high-quality education experiences for international and domestic students alike studying in and with Australia. The Strategy would place students – onshore, offshore, online or outbound – and their experiences at its core. The priorities have been drafted to capture all sub-sectors of Australia’s international education sector and could guide governments, providers and other stakeholders to realise the vision of the Strategy.



Students at the centre

The Strategy could put in place a framework to assist in ensuring international students receive a world-class experience studying with Australia regardless of their location and/or mode of study. Part of this could include deliberate consideration and engagement of the student perspectives in enhancing Australia’s education offerings. Improving the student experience for all creates a mutually beneficial ‘global classroom’. Employers seek graduates with strong intercultural capabilities. International students share global perspectives in education and research settings that elevate the education experience for all students.



Delivering for the future

The Strategy could encourage stakeholder partnerships to deliver a responsive, innovative and future-focused international education sector that meets education and industry needs now and into the future. A key part of this could be the exploration of academically rigorous digital delivery, blended learning models delivered offshore and online to expand Australia's reach in educating new cohorts of students around the world.

Setting the standard

The Strategy could aim to drive continuous improvement in our high-quality Australian education, research and training, ensuring our high standards continue to safeguard Australia's reputation and global competitiveness, and attract the best and brightest students from around the world to study with Australia. While there are regulatory limitations for the delivery of education offshore and online, the Strategy could look at how to ensure quality is maintained and upheld regardless of where our international students are when they are studying.

Thriving through diversity

The Strategy could prioritise ways to strengthen sustainability and build a resilient international education, research and training sector through diversification of country partners, student profiles, destinations, sectors, courses, and student experiences and opportunities.

Connecting communities

International education is a tool to facilitate strong and meaningful local connections with communities for international students and providers (as well as industries, regions and businesses) in Australia. It also fosters dynamic global research and institutional connections, international industry and partnerships. The Strategy could also assist in facilitating Australian outbound students studying and conducting research overseas to create connections and look at opportunities to leverage vast and growing alumni networks. Alumni networks will also continue to create and facilitate social, cultural and economic linkages between countries well into the future.

Distinctly Australian education

The Strategy could aim to enhance Australia's position as a trusted world leader in international education, research and training, by showcasing Australia's excellence in distance education, research innovation and ingenuity, and schooling and curricula development. The sector's strong industry connections and trusted quality assurance mechanisms can continue to support the student protections and employability outcomes that define our system. Australian graduates will receive internationally recognised qualifications and competencies to prepare them for future success.

Achieving our proposed vision

Opportunities to diversify and enhance our relationships with established and emerging partner countries

The Strategy could highlight the opportunities and challenges in partner countries. It could demonstrate how the sector can embrace innovation and enhance resilience by diversifying engagement with both established and emerging countries through new partnership models. While Australia attracts students from across the globe, there are opportunities to strengthen our quality partnerships to attract more students online and offshore from regions where there is growing demand for education and skills.

The Strategy could recognise the benefits to Australia's soft diplomacy that comes from international education, where exchanges between students can support and expand regional and global influence. Active global alumni communities develop lifelong connections between students, employers and communities, helping to spread positive impressions of Australia in partner countries. A new Strategy could explore ways to maximise this alignment.

The sector could work to capitalise on the effort and investment in high-quality online and transnational learning established in the years prior to COVID-19 and expand offerings for international students located offshore and online. Providers may also look to offer short and highly targeted courses through micro-credentials. While AQF courses are well regarded in offshore markets, there is also a growing demand for more bespoke and cost-effective products, particularly in the VET sector.¹⁷

Maintaining quality and responsive regulatory and policy settings

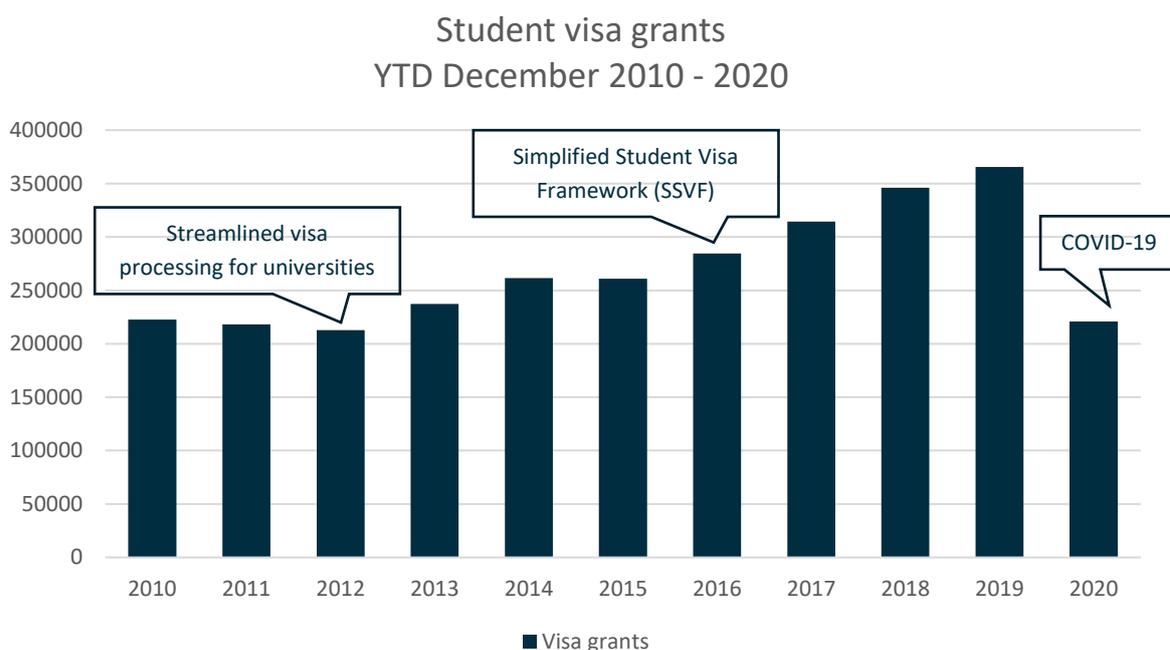
Australia's regulatory frameworks and policy settings including the *Education Services for Overseas Students* Act and its legislative instruments, as well as the Tuition Protection Service, will need to be increasingly forward-looking and adaptive to ensure Australia maintains its reputation as a provider of world-class international education and training.

Australia will also remain committed to supporting and connecting future international leaders through high quality scholarship programs such as the Australia Awards, Destination Australia Program and New Colombo Plan. Providers also have a key role to play in developing and implementing strategies to ensure their policies and procedures support the legislative framework and continue to deliver positive experiences for students.

¹⁷ Australia Skills Quality Authority, *Protecting the quality of international VET and English language education*, 2019.

Student visa programs

Reforms in the international student visa program over the last 10 years have facilitated growth in the number of international students studying in Australia. The trends in overseas student numbers over this time have shown that students are attracted to Australia for many reasons – notably education quality, lifestyle and graduate outcomes. An internationally competitive student visa program plays a role in maintaining Australia’s reputation as a desirable destination. Reforms of the past decade, such as the streamlining of arrangements for the university sector in 2013 and the establishment of the *Simplified Student Visa Framework* in 2016, saw a rationalisation of the available student visa subclasses from seven to one (while retaining a Student Guardian visa) and the introduction of a new Evidentiary framework.¹⁸ These changes correlate with demonstrated growth of the sector.



Source: Department of Home Affairs, *Student visa data lodgements*, 28 January 2021

Throughout the pandemic, the Australian Government has implemented legislative, policy and operational measures to mitigate the impact of COVID-19 on international students and graduates and the international education sector. This has ensured where possible, that students are not disadvantaged due to COVID-19 and associated travel restrictions and that Australia remained competitive with other countries.

Government and the international education sector have a shared interest in maintaining an internationally competitive policy settings which facilitate the entry of genuine students, while also ensuring the high quality and quantity of education offerings while balancing immigration integrity.

Over the next decade, maintaining a responsive and internationally competitive policy settings will be important to support ongoing sustainability.

¹⁸ Department of Home Affairs, *Simplified Student Visa Framework (SSVF) Appraisal*, 2018.

The future in a time of COVID-19 recovery

A new normal

The new Strategy should look at both short- and long-term challenges and opportunities facing the international education sector, as well as map out a path forward for the sector that balances addressing short term challenges presented by current global trends with addressing longer-term big picture opportunities such as the shift towards new modes of delivery and driving innovation to meet the global skills needs of the future.

The current global economic recession, generated by the onset of the COVID-19 pandemic, will continue to disrupt partner and competitor markets relevant to the Australian international education sector, as well as Australia itself. Australia's economic downturn, in comparison to other countries, is expected to be milder and with a faster recovery than key competitor destinations such as the United Kingdom and the United States.¹⁹ The relatively stronger economic conditions in Australia, compared to other markets, will support the sector to recover more quickly. New competitive advantages are also emerging from the pandemic, as students look to countries offering affordable and high-quality education and sound health systems. However, as borders remain closed, there are suggestions that students originally looking to study in Australia are moving towards other countries such as the United Kingdom and Canada.²⁰

Diversification into the future

Diversification is a keen focus for the ongoing sustainability and growth of Australia's international education sector, as we look to expand beyond traditional markets, sectors and products to diversify our concentration on narrow sets of markets or products. A diverse international education sector includes multiplying opportunities in:



Emerging partner countries and broader regions within established partner countries



Broader course and field of study options for international students, drawing on Australia's high graduate outcomes, multidisciplinary teaching and research and positive student experience



Widen the reach of international students in Australia and deepen transnational and online education communities



Expand levels and qualifications types to provide more industry-ready and relevant education, including short courses, education technology, professional development and executive training and non-Australian qualifications frameworks courses



Increasing offshore partnerships, twinning and joint programs and the delivery of education online, giving more opportunities for students to study with Australia

¹⁹ Deloitte Access Economics, 'Understanding the Impacts of COVID-19 on International Education Final Report', 2020.

²⁰ IDP Connect Crossroads III, International student choices and motivations increasingly driven by the availability of face-to-face teaching, 18 November 2020.

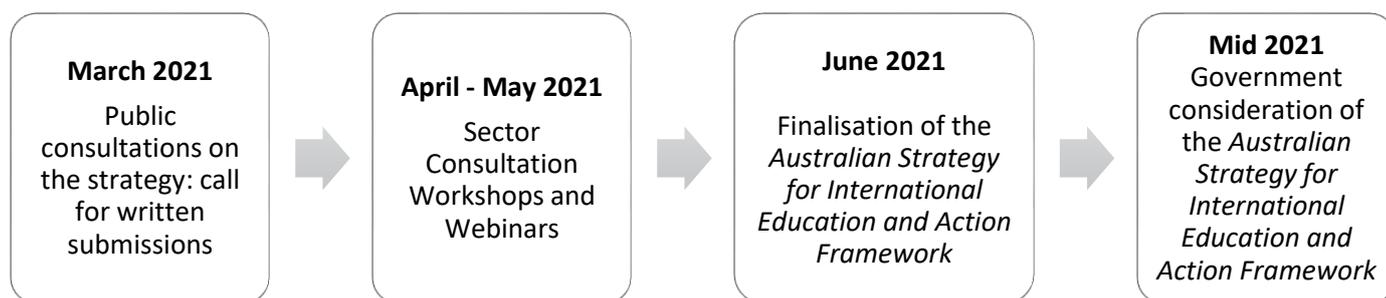
The Development of the new Strategy

Determining measures of success

A strong, quality-driven, industry-relevant and innovative education system will be fundamental to lifting Australia's competitiveness and ensuring the best students continue to choose to study in and with us, either onshore, online or offshore. Our education will be designed to meet the needs of future Australian and global employers, advance individuals and societies, and contribute to community development in Australia and overseas.

The success of this Strategy could be measured through:

- Increased student satisfaction onshore, offshore and online, including for domestic students in courses with international students and improved perceptions of online education quality
- Diversification of courses, partner countries, market segments and modes of delivery
- Greater positive sentiment towards international education in Australia including enhanced understanding of benefits of international education to regional and local communities
- Creating a skilled, internationally mobile community for all students
- Improved employability outcomes for international students in Australia and overseas
- Growth in the number of students onshore, offshore and online, particularly in transnational education and training delivered by Australian providers.



As the Strategy is implemented, points of review may take place every two years to ensure the Strategy continues to be contextually relevant. This will be an opportunity to realign, reframe and reprioritise the Strategy according to emerging and future needs and growth points in the international education sector.

An Action Framework

Australia's international education sector must continue to proactively adapt to the 'new normal' of evolving pandemic conditions. The return of international students will be vital to reinvigorating the sector, but diversification efforts, including expanding our offshore engagement and delivery models will be just as important to the longer-term success of the sector.

Australia's international education sector, through the new Strategy, could look towards formulating a concrete pathway to action to realise its aspirations over the next decade. The final Strategy could set out the actions needed to pursue this path. An Action Framework will outline Australia's overarching goals and approach to international education over the next decade.

Submissions – Contribute your ideas

You are invited to take the opportunity to contribute your ideas on this consultation paper. The Department would appreciate you answering all discussion questions outlined below, framed to gather your views and feedback on the proposed Australian Strategy consultation paper. For more information on the department's work on international education, please visit <https://www.dese.gov.au/international-education>.

You will be provided an online submission form to submit your answers (up to 500 words per question) or you can email your submission to the department at education-ies@dese.gov.au. Please note all submissions will be made publicly available on a rolling basis throughout the consultation period, unless otherwise advised by the submitter.

Submissions will close at 11.59pm AEST, 12 May 2021.

Discussion questions

- 1. What are the key priorities for a new Australian Strategy for international education?**
- 2. Students should be at the centre of the new Strategy. How can Australian education providers deliver the best possible student experience both now and in the future?**
- 3. What changes are needed to make Australia more globally competitive over the next decade?**
 - i. Policy and regulatory flexibility are important in enabling providers to innovate. How can we utilise these settings to pursue opportunities, and in what other ways can we work together to ensure Australia remains globally competitive?
- 4. How can providers, governments and stakeholders work together to achieve diversification opportunities (for example of disciplines, source countries, study destinations and delivery models)?**
- 5. What are the necessary skills for the future that students should be prepared for?**
 - i. How can Australia improve employability outcomes for international students, ensuring they have the necessary skills to compete in a globally competitive labour market?
- 6. How do we create a uniquely Australian education experience?**
 - i. What is our value proposition for both international and domestic students?
 - ii. How do we offer an Australian education experience while complementing the value of Australian offshore and online education?
- 7. Community support for the international education sector is important for the sector's social licence. How can the benefits this sector provides to Australia be better understood by wider community?**
- 8. What else should the Council for International Education and the Australian Government consider in developing the new Strategy?**