

# Queensland International Education and Training

Strategy consultation paper  
2022

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# 1. Introduction

Every year, an estimated 5.6 million students (IIE 2021) globally select an international study destination, including approximately 130,000 that choose Queensland. Queensland benefits greatly from the contributions of these students who study, research, work and live right across the state.

Prior to the COVID-19 pandemic, international students expanded many Queensland communities and contributed to the State's knowledge and visitor economies. These students have been located from Cairns to Coolangatta, from Brisbane to Charters Towers and many places in-between. During the pandemic, the loss of many of these students has been keenly felt across the state as their contribution to Queensland's vibrancy, multi-culturalism, community and businesses has become very apparent.

Now the Queensland borders have re-opened, a new Queensland International Education and Training (IET) strategy is being developed to assist the reinvigoration of the sector. It is time to build stronger partnerships between government, business, communities and education and training providers to attract the best students from around the world and harness the talent and skills that they bring. Such students help meet the demands of our emerging industries and new technologies while enriching global networks and cultural understanding for local students. Their skills and diversity help drive innovation, and this will become increasingly important in the lead up to the Brisbane Olympics in 2032 which will amplify investment and economic growth opportunities across the state.

The Queensland Government is committed to growing the international education and training sector to ensure that our international students not only have access to a world-class education but also the best community experience possible and the greatest opportunity for further education, training, research and employment.

The aim of this consultation paper is to stimulate discussion to help shape the future Queensland Government support of the IET sector, a sector which has a strong role to play in supporting the *Queensland Economic Recovery Plan*, and the Queensland Government objectives for the community.

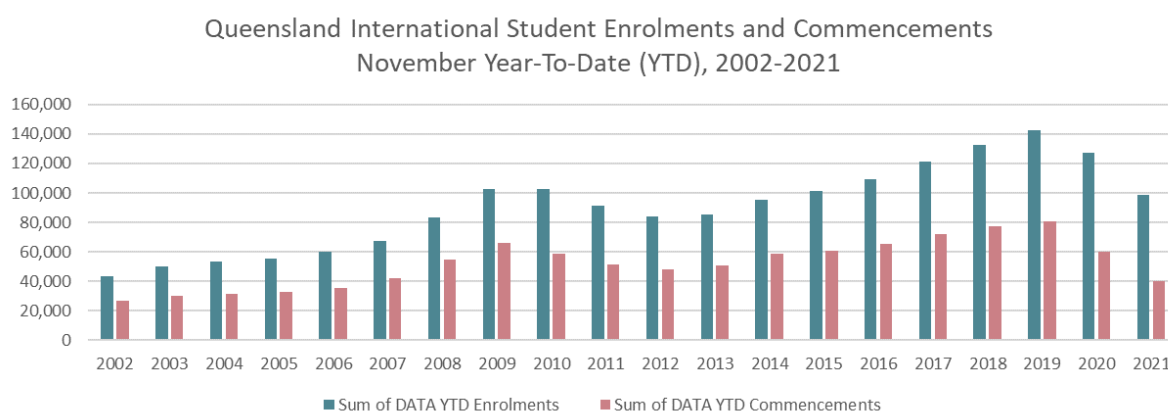
## How do we define the IET sector?

International education refers to education, training and research that transcends national borders. It aims to connect people from different societies and encourages students to be active and engaged participants in an increasingly engaged world. While the focus remains on the students travelling from their home countries to study in Queensland, attend an international branch campus or study online with a Queensland education and training provider, emerging delivery and knowledge models, demand for skills in the workforce, delivery and assessment models are providing opportunities for new businesses.

# 2. Context

Queensland is well positioned to be global leader providing a premier destination for international students seeking quality skills and career outcomes. Our state combines world-class schools, universities, English language intensives and vocational education and training providers, with an unrivalled lifestyle, welcoming communities and growing innovation ecosystem.

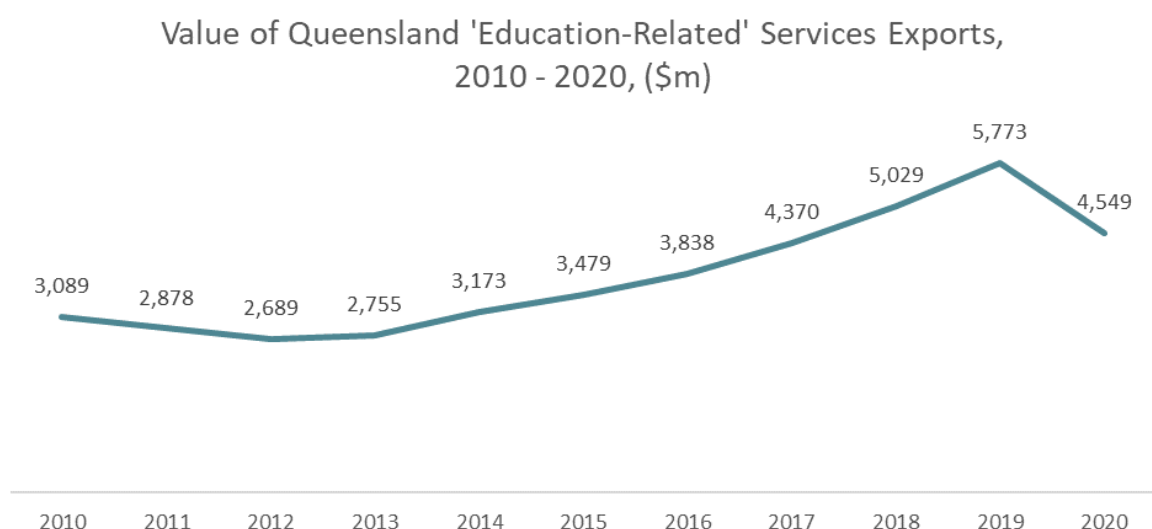
Over the past decade, the sector had grown in significance for the Queensland economy. International student enrolments grew by 40% in cumulative terms over the past decade, reaching a record high of 144,900 enrolments in 2019. This growth led to international education and training becoming the largest services export in Queensland.



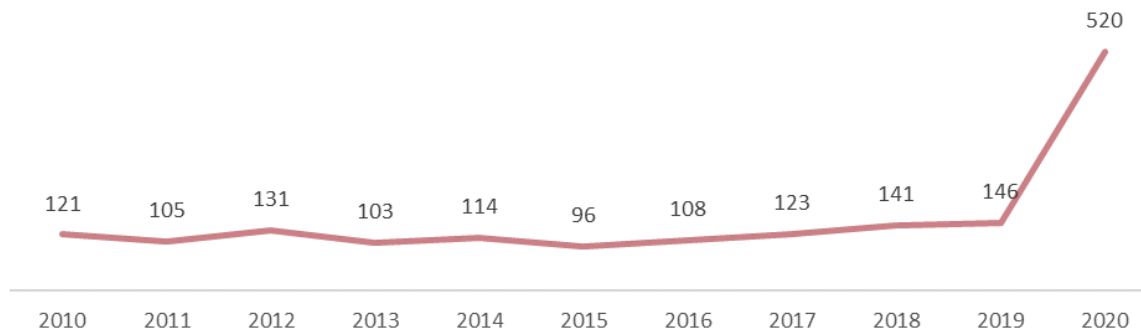
*Source: Department of Education, Skills & Employment, November 2021*

However, unlike commodity-based exports, the IET sector is built on attracting people that represent global talent to Queensland and foster long-lasting international networks. Beyond the economic activity and jobs supported by IET export revenue, the IET sector further integrates Queensland into the global community by building our cultural competency. This supports a range of benefits, including increased trade and investment, creating a more diverse and creative workforce that drives innovation, and results in informal ambassadors for the state.

The impacts of the pandemic on the IET sector have been significant. Following seven years of consecutive growth the sector declined by \$1.2 billion, or 21.1% from 2019 to 2020. The nature of the IET industry means that the impact of the losses from 2020 and 2021 will be felt for years to come. A typical student would live in Queensland for more than 3 years, so the loss of new enrolments in one year means the loss of future annual economic benefit for many years.



### Value of Queensland 'Personal, Cultural, and Recreational' Services Exports, 2010 - 2020, (\$m)



Source: Australian Bureau of Statistics, International Trade, 2020

**\*Personal, Cultural and Recreational Services:** International border closures have had a significant impact on international students. Many students were unable to enter Australia to commence their studies face-to-face. This led to an **increase in online study**, with revenue from this activity being the main driver for the increase in Personal, Cultural and Recreational Services.

While Queensland and Australia's borders have been closed, a great number of Queensland's international students have continued online offshore. However, with competitor countries such as the UK and Canada opening borders more quickly and gaining market share, there is a risk that our existing and future students will select other study destinations.

The development of a new IET Strategy will focus on the recovery and growth of the sector, building on existing strong foundations. Under the former *Queensland IET Strategy to Advance Queensland 2016-2026*, the industry grew from an export contribution of \$3.5 billion in 2015 to \$5 billion in 2018, representing Queensland's fastest growing service export. Given the dynamics of the sector, the strategy was evaluated in late 2018 with significant feedback on content and intent for a revised strategy provided by stakeholders. When the pandemic hit, the sector was recognised as part of the Queensland Government COVID-19 recovery planning, and the government and the IET industry co-designed the *IET Roadmap to Recovery* and directed resources to developing a plan for the safe and gradual return of students to Queensland. The Roadmap was based on over 50 meetings with 450 stakeholders held in the first half of 2020.

Ongoing engagement with the sector, particularly during COVID-19, has highlighted a shared draft vision to work together towards as we move through the pandemic and build our long-term future:

*A strong and sustainable Queensland international education and training industry that builds global engagement, nurtures lifelong ambassadors and is a catalyst for attracting and developing quality talent to grow the knowledge economy.*

Feedback indicates that short, medium and long-term recovery and growth of the IET sector is focused on five key aims:

- a) International market development and diversification
- b) Facilitate the return of international students to Queensland
- c) Enhance the student experience, development and support
- d) IET Industry development and support, particularly strengthening links between businesses within the IET eco-system and advocacy for the sector within government
- e) Building the capacity of regional Queensland clusters

## **What is the role of the Queensland Government in supporting the recovery of the IET sector?**

The coordinating agency for IET within the Queensland Government is Study Queensland, a specialist international education and training unit with Trade and Investment Queensland. The business unit has four key roles:

1. Inform - Communicate policy analysis, events and outcomes to the sector and industry stakeholders, including in the regions, to maximise opportunities and build capacity
2. Connect - Connect the sector, regions and other industry stakeholders to promote a collaborative, leveraged sector locally and globally
3. Fund - Resourcing assistance to innovate in key areas of priority
4. Advocate - Analyse priority policy issues of the industry to influence outcomes across the state and Australian Governments

## **3. Strategic Aims**

### **a) International market development and diversification**

The IET sector is an increasingly competitive global industry. In 2019, the United States of America and the United Kingdom hosted the largest share of international student enrolments, with a global share of 16 per cent and 8 per cent respectively (OECD/UIS/Eurostat (2021)). Canada is also quickly becoming a global competitor for Australia, growing 68 per cent from 2014 to 2018. Countries such as China, Germany, France and Malaysia are emerging as competitors in the global market as they increase their institutional capacity and deliver a greater number of courses in English.

Prior to COVID-19 international student enrolments in Australia had grown from 272,728 enrolments in 2002 to 843,322 in 2019, a 246% increase in just under two decades. In 2002, the value of the international education sector in Australia was \$6,282million. In 2019, the value had risen to \$40,336million.

As at November 2021, New South Wales had the largest share of international student enrolments (38%), followed by Victoria (32%). Queensland was ranked third, with 14% market share of all international student enrolments in Australia. At its peak growth in 2019, the priority markets were China, India and Brazil, and as these markets have started to mature, Australia has seen strong year on year growth from emerging markets such as Nepal, Mongolia, Sri Lanka and Colombia.

Much media attention has been paid to the reliance of the IET sector on key markets such as China, particularly in the higher education sector. Feedback from the sector has confirmed a strong interest in promoting a growing diversity of education, training and research products and services through expanded markets and channels. The national strategy also emphasises the need to promote diversity in markets, products and services.

The Queensland Government is committed to promoting Queensland as a destination of choice for students seeking quality skills and careers outcomes. Focused destination marketing, and targeted market engagement through Study Queensland and the network of Queensland Government Trade Commissioners offshore provide substantial opportunities to attract the best students from around the world that will contribute strongly to the state.

***Question 1: Which markets will be key to target as the sector aims to diversify?  
Are there additional Queensland Government support measures that could boost this activity?***

### **b) Facilitate the return of international students to Queensland**

In 2020 and through 2021, the COVID-19 global pandemic and Australia's response – including the closure of international borders and ongoing uncertainty about the timing of recovery – resulted in substantial disruption to the IET sector. At the end of 2020, 23,229 student visa holders in Queensland were located outside Australia, either studying offshore or having deferred or cancelled their enrolments.

However, on 19 January 2022, Queensland announced the removal of quarantine requirements for international arrivals from 22 January 2022, with international students now able to freely arrive in Queensland without the need to quarantine. In the current operating context, a dedicated Queensland Student Arrival Plan is no longer required.

This step has brought Queensland into line with New South Wales and Victoria. These states removed quarantine requirements for international arrivals on 1 November 2021 and removed caps on the numbers of vaccinated arrivals. When the Federal government announced the removal of travel restrictions for vaccinated international student visa holders from 15 December 2021, it meant that international students were able to freely arrive in both states without the need to quarantine from that date.

On 19 January 2022, the Hon Alex Hawke MP, Minister for Immigration, Citizenship, Migrant Services and Multicultural Affairs stated that approximately 43,000 international students had returned to Australia since 15 December 2021. The final domestic destination, sector or level of study of the students arriving in Australia are unclear. However, it is highly likely that a vast majority of students have been arriving in New South Wales and Victoria who have not had quarantine requirements and no arrival caps since 1 November.

The lack of current data about international travellers means that it is difficult to quantify the volume of international students travelling to Queensland. The latest Australian Bureau of Statistics Overseas Arrivals and Departures released on 18 January 2022, references November 2021 and states 40 international student arrived in Queensland during that month.

Flight availability has been one impediment to the return of offshore students. Whilst international air services to Queensland's key airports have returned marginally since mid-2020, Brisbane Airport's international passenger arrivals remain very low. However, recent advice indicates that more borders are opening and capacity is increasing, with flights from markets such as Asia, Europe, USA, Canada, Latin America and India likely to be expanding from March onwards.

Even though Australian and state travel restrictions have been lifted, international students appear to be not returning quickly to Queensland. Anecdotally, the reasons include lack of flights, public health risk, Australian education providers delivering online rather than classroom (due to current Omicron outbreak) and accommodation limitations.

**Question 2: What are the top three actions the Queensland Government could take to support the sector in the short, medium and long term?**

### **c) Enhance the student experience, development and support**

International students leave their friends, families and communities in order to study at Queensland's world-class education and training providers. Ensuring a rewarding experience throughout their study is a priority to safeguard not only student wellbeing but also Queensland's reputation globally.

Ensuring students who choose Queensland as their second home have access to facilities, support services and programs that facilitate positive experiences is key. Existing services provided by the State Government include:

- Queensland Student Hub Network - students can access a range of support services including free resources and information, workshops and events, 24-hour phone support and access to student support officers.
- 1800QSTUDY ([1800 778 839](tel:1800778839)) - a free 24/7 phone hotline service dedicated to helping international students with areas such as accommodation, public transport and travel, employment, health and wellbeing, legal, complaints and more. Students can also ask for a translation service if required.
- Launch U - connects students, employers, and education providers through different talent and employability experiences designed to build students' professional skills.
- Launch U Trade Accelerator - a virtual program where student teams are assigned a real-life business project focusing on a specific international market. The student project focuses on carrying out international market research and providing recommendations on international business growth opportunities to a Queensland-based export or trade business.

The Queensland Government can assist in delivery of student-centric activities and initiatives which support, integrate and develop our global students during their time in Queensland, providing them with a meaningful and fruitful study experience and additional employability support.

Connecting students to further study or future career opportunities will add tangible value to the student experience. Providing opportunities for students to build employer connections, be part of a meaningful pool of alumni and have accessible platforms to launch their future careers will set Queensland apart to prospective international students, as well as providing the ability to draw value from the industry.

In particular, supporting activities which facilitate the development of 21<sup>st</sup> century skills, such as critical thinking, communication and creativity and the building a mindset of adaptability and resilience complement existing employability experiences available to students and fosters future innovators.

Through these activities the Queensland Government can also take a role in raising awareness of the value of the international education and training sector amongst the business community. Harnessing the talent and skills that international students bring to our communities will help meet the demands of accelerating changes in jobs and industries resulting from the adoption of new technologies and business models.

***Question 3: Is there a need for Government support to connect international students to Queensland businesses and communities to increase 21st century skills development and employability? What measures would complement/boost existing activities?***

#### **d) IET Industry development and support**

Achieving strong ambitions for the IET sector requires a collaborative approach to build the critical mass essential to promote Queensland as a leader on the global stage. Strong collaborations between government, business, communities and education and training providers will be essential to ensure the targeted market engagement, strong student experience and increased local and global connections necessary for Queensland to compete successfully in an increasingly aggressive global market.

Such collaborative support will be paired with advocacy for the sector at local, state and federal Government levels including:

- Continuing appointment of a Queensland Cabinet Minister with responsibility for international education and training
- The International Education and Training Advisory Group (IETAG) - a government body comprising industry experts chaired by the Minister responsible for IET that enables regular consultation to understand priority issues
- Data-driven analysis of international education and training policy issues to support evidence-based decision making and promote the sharing of data around trends, economic impact and lead indicators
- Connecting the sector with the Queensland Government's global network of business development managers and research directors to provide a global presence able to respond to opportunities
- Representation of international education and training industry priorities at state and national forums
- Working collaboratively across the Queensland Government to place IET as an essential plank in building the talent pipeline.

This collective approach across the Queensland Government has been evidenced through the inclusion of IET in the pandemic economic and social recovery work. The absence of students across the state highlighted the wide range of benefits they bring to our communities, businesses and industries as well as sector providers. While much of the media focus during the pandemic has been the contribution of students as a casual workforce in the tourism, retail and agricultural sectors, international students provide a much greater contribution to bridging the current and future skills gaps of the state.

The impacts of the pandemic have arguably accelerated the global competition for talent. Given the interplay between the IET sector and research, innovation and economic policy, there will be



increased connectivity between the IET strategy and broader government policy settings. The IET sector has a role to play in addressing the shortage of skills in key growth sectors, and significantly strengthens the talent pipeline that attracts the investment of global companies seeking a base in the Asia/Pacific region. Such activity will only increase as the 2032 Olympics draws closer.

Advocacy for the sector nationally will also remain a priority. On 26 November 2021, the [Australian Strategy for International Education 2021-2030](#) was launched. Then responding to the low percentage of student visa holders located offshore travelling to Australia, on 19th January 2022, the Federal Government announced incentives to attract international students and backpackers to travel to Australia:

1. Relaxation of work restrictions, removing the 20hr per week cap, and requirements to study prior to engaging in work
2. Refund of the \$630 student visa application fee for 8 weeks from the 19th January 2022
3. \$3 million funding for Tourism Australia to promote travel to Australia targeting international students and backpackers (temporary workers)

Regular dialogue with the sector will be critical to enable the Queensland Government to advocate for the legislative settings that best meet the Queensland IET sector aims and ambitions.

***Question 4: Given the strong interplay between IET and talent, how can government, organisations and the community capitalize on the relationship, map its value and promote Queensland's strengths?***

### **e) Building the capacity of regional Queensland IET clusters**

The Queensland Government will continue to partner with regional study clusters to maximise the potential of the IET sector to contribute to communities and economies across the state. Unique to Queensland, a large percentage of international students (30% in 2020) reside outside of the capital city of Brisbane. This is the largest volume of students studying outside a capital city in Australia and provides a distinctive opportunity to build diversified and sustainable communities through the growth of the sector.

As the state economy shifts towards knowledge-intensive jobs and industries, access to talent will become critical to accelerating and sustaining economic success – especially across Queensland's regions. The ability to attract, develop and retain the talent pipeline essential to support new high-growth industries will be critical, and the IET sector has strong potential to contribute to the regional quest for talent.

Queensland attracts a high volume of students enrolled in English language short courses, vocational education and training and educational tours. These students study regionally, and not only enjoy sharing Queensland's diverse experiences and landscapes with family and relatives, they also engage locally through casual employment opportunities, often within the tourism and agriculture sectors.

Each of Queensland's regions have their own unique value proposition and opportunities for growth. Building on efforts in partnering with local organisations to enhance student experience,

targeted engagement with each study destination will be undertaken to ensure resource and funding support is aligned to local needs.

Central to this activity will be the network of Study Clusters supported by the Queensland Government across the state who share learnings and enhance knowledge through a regional community of practice, which meets several times a year. In addition, major sector events are hosted regionally, including the flagship International Education and Training Summit which will be re-instigated as the state moves through the later stages of the pandemic.

***Question 5: What are the barriers and opportunities for regional study clusters to attract and host more international students?***

## 4. Consultation

All interested stakeholders are invited to submit a written submission to inform the development of the Queensland IET Strategy. This paper poses questions about the future envisaged and encourages responses to inform targeted actions and initiatives:

1. Which markets will be key to target as the sector aims to diversify? Are there additional Government support measures that could boost this activity?
2. What are the top three actions the Queensland Government could take to support the sector in the short, medium and long term?
3. Is there a need for Government support to connect international students to Queensland businesses and communities to increase 21st century skills development and employability? What measures would complement/boost existing activities?
4. Given the strong interplay between IET and talent, how can government, organisations and the community capitalize on the relationship, map its value and promote Queensland's strengths?
5. What are the barriers and opportunities for regional destinations to attract and host more international students?

### **Contribute your ideas**

Submissions can be made in writing through the Queensland Government consultation portal at: [Find consultations | Your say | Queensland Government \(getinvolved.qld.gov.au\)](https://getinvolved.qld.gov.au)

Alternatively, write your feedback and post it to:

Attention: Study Queensland IET Strategy Consultation

Trade and Investment Queensland

PO Box 12400

Brisbane QLD 4003 Australia

Closing date for submissions is: Friday 6 May 2022