



INQUIRY INTO AUSTRALIA'S TOURISM AND INTERNATIONAL EDUCATION SECTORS

DEPARTMENT OF JOBS,
SKILLS, INDUSTRY AND
REGIONS SUBMISSION



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The Victorian Government's Department of Jobs, Skills, Industry and Regions (DJSIR) welcomes the opportunity to present a submission to the Joint Standing Committee on Foreign Affairs, Defence and Trade's inquiry into Australia's tourism and international education sectors (the Inquiry).

This submission presents the position of DJSIR in addressing the Inquiry Terms of Reference. The Victorian Government's comprehensive position on the related topics of migration and employment has been set out in other submissions made to the Commonwealth Government, including responses to the Commonwealth's Employment White Paper, the *A Migration System for Australia's Future* review, and responses to requests for input on the size and composition of Australia's annual migration program.

The Victorian Government notes that the Inquiry is being held concurrently with the Australian Universities Accord process, the Commonwealth's comprehensive review of Australian higher education. The Victorian Government intends to contribute to the Australian Universities Accord process, which it understands will include an examination of international education.

About DJSIR

The Department of Jobs, Skills, Industry and Regions leads the Victorian Government's focus on driving a strong and resilient economy that benefits all Victorians – by creating more opportunities for people through jobs and skills; supporting businesses and industries to grow and prosper; and building vibrant communities and regions.

Sport, Tourism and Events

Within DJSIR, the Sport, Tourism and Events group works to strengthen Victoria's status as Australia's leading sport, recreational, tourism and events destination by building the resilience of the experience economy to adapt to change and to provide more secure jobs and diverse experiences for Victorians and visitors.

Global Victoria

Global Victoria is the Victorian Government's trade facilitation and promotion agency with a mission to build the skills and knowledge of people and businesses to help them achieve their global ambitions. As a gateway to global economies and communities, Global Victoria connects Victorian businesses and education providers to new opportunities and international markets, advocates for greater market access and promotes doing business with Victoria globally. With 24 offices strategically located in Victoria's key export markets, the Victorian Government Trade and Investment (VGTI) Office network is the largest of its kind among Australian states and territories. Study Melbourne and International Education, within Global Victoria, leads the Victorian Government's efforts to support international education providers and international students through diversifying export markets and products; providing support to providers to expand their export market focus; and maintaining Victoria's position as a destination of choice for students. The work of Study Melbourne and International Education is directly aligned with and supports delivery of the vision, goals and actions in Victoria's International Education Recovery Plan 2025.

Tourism sector

Background

Victoria is considered a national leader in the visitor economy. In the year ending December 2019, before the COVID-19 pandemic, total tourism expenditure in the State reached \$32.5 billion, and Victoria welcomed 100.4 million visitors. Of this, international visitor expenditure contributed more than \$8.8 billion to the state's economy and visitation numbers reached 3.1 million.

Since 2020, international tourism has been hard-hit by the pandemic and associated travel restrictions in Australia and overseas, while many tourism providers have also been impacted by a series of natural disasters.

In 2021, to help the tourism and travel sector to recover from the dual impacts of the 2019–20 bushfires and the pandemic, the Victorian Government delivered the [Visitor Economy Recovery and Reform Plan](#)¹ (the VERRP). The VERRP serves as a whole-of-state visitor economy strategy, with a goal of reaching \$35 billion in annual visitor spend and generating 300,000 additional jobs by June 2024. This goal is supported by an investment of \$633 million across four years.

Informed by the findings of the Regional Tourism Review in 2019, the VERRP is strengthening the state's tourism offering by developing new experiences, products and infrastructure and attracting more international, interstate, and intrastate visitors through events and effective marketing.

The VERRP focuses on six key themes:

- Products and infrastructure: invest in and develop experiences that attract more visitors, who spend more during their stay.
- Industry strengthening: rebuild and strengthen the industry and workforce to support high-quality visitor experiences and build resilience to future shocks.
- Destination marketing: rebuild demand through effective collaborative marketing, so Victoria becomes the top choice for tourists as the industry recovers.
- Events: revive Victoria's calendar of world-class events, to drive demand by strengthening our position as a global events destination.
- Strategic collaboration and planning: strategic collaboration and coordination across community and industry, and local, state, and Commonwealth governments.
- Data and insights: use data and insights to drive robust decision-making.

The September 2022 National Visitor Survey (NVS) shows Victoria's visitor economy is recovering but not yet recovered. Total tourism spend in Victoria has returned to 84 per cent of its pre-pandemic level, reaching \$26.5 billion in the year ending September 2022. International spend is almost back to a third (28 per cent) of pre-pandemic levels at \$2.5 billion, while international overnight visitors have been slower to rebound at 20 per cent of pre-pandemic levels. Total domestic spend has fully recovered above pre-pandemic levels (+5%), reaching \$24.0 billion in the year ending September 2022.

¹ https://djsir.vic.gov.au/data/assets/pdf_file/0006/1987368/Visitor-Economy-Recovery-Reform-Plan.pdf

Response to the Inquiry Terms of Reference

1. Challenges and opportunities for growth in tourism and how Australia can reassert itself as a leader in the international tourism sector

Workforce

Prior to the pandemic, and certainly since, attracting and retaining skilled (and relatively unskilled) labour in the tourism industry has been problematic. The closed borders during the global pandemic compounded systemic workforce issues, with most Victorian industry sectors now seeing labour and skill shortages. In Victoria there were 126,600 reported job vacancies in August 2022 – an increase of 111 per cent from February 2020.

As part of VERRP, the Victorian Government commissioned a Visitor Economy Workforce Planning and Skills Review, which identified key issues and opportunities for the visitor economy workforce. The review confirmed the workforce and skills challenges facing the industry are multi-layered, complex, and require levers at both the state and federal level.

The most critical workforce issues facing the industry, and inhibiting businesses from growing or operating at full capacity, include deficiencies in the areas of:

- skilled and adequate workforce to cater for surging demand
- regional accommodation for workers
- visitors with work rights (e.g., Working Holiday visas, student visas, Temporary Work (Skilled) visas (subclass 457))
- local workforce due to longstanding issues with remuneration, working conditions, professional pathways, and job security.

Victoria is taking steps to address skills and workforce issues through implementation of the VERRP. This has included providing each Regional Tourism Board with \$60,000 to deliver tailored workforce development plans or projects to address local workforce issues, drawing upon the findings of the Visitor Economy Workforce Planning and Skills Review. The Victorian Government has also partnered with the Young Tourism Network to deliver a pilot Young People in Tourism program that aims to attract more young people to a career in tourism.

While the VERRP's industry strengthening programs will help to address some of Victoria's workforce and skills issues, reforms to housing and Commonwealth migration policy settings may also be required to alleviate the shortfall in the supply of labour to critical tourism related industries.

Case study 1: Industry Workforce Development Program – Ballarat Multicultural Recruitment Program

In early 2022, Ballarat Regional Tourism (BRT) applied for the Industry Workforce Development Program (funded through VERRP) to deliver the Ballarat Multicultural Recruitment Program. BRT partnered with the Ballarat Regional Multicultural Council (BRMC) to identify opportunities for job seekers from culturally and linguistically different communities to work within tourism and hospitality businesses seeking employees.

The BRMC identified that multicultural job seekers were motivated to work but could lack the contacts needed to meet employers. This project presented an opportunity for businesses to pass workplace knowledge to new multicultural employees who would welcome the chance to work and share their multicultural knowledge and skills. Culturally diverse jobseekers bring huge value to the tourism and hospitality industry, including multiple languages, diverse ways of looking at things, solving problems and relating to customers and visitors.

The project is nearing completion and BRMC Community Employment Connectors have successfully placed multicultural job seekers into roles within the Tourism and Hospitality sector.

Aviation

International spend as a component of the visitor economy has been one of the slowest areas to rebound. This trend is partially attributable to the slow return of aviation capacity to Australia. Operational constraints are increasing the uncertainties around the timing for re-establishing international routes to Australia with many airlines

deferring decisions to resume or grow services. This has been compounded by fare price hikes due to high demand and high jet fuel prices.

Prior to the pandemic, Victoria had built a strong offering of direct international aviation services, with 37 international airlines flying directly into Melbourne Airport. Victoria is starting to recover its international services and in December 2022 there were 28 international airlines flying into Melbourne. Direct services to Australia, and Victoria in particular, are critical to the recovery of the sector and the reactivation of the major events calendar, return of international students, and transportation of cargo. The Victorian Government is working actively to secure the re-establishment of international airline flights and capacity from Victoria's key markets.

Infrastructure investment

Government investment in infrastructure and projects activates tourism opportunities, including opportunities for the private sector to leverage these investments. As part of the VERRP's Tourism Infrastructure Program, the Victorian Government has funded:

- \$120.6 million for 19 flagship infrastructure projects across Victoria that will create a halo effect and spur private investment and new products in surrounding areas.
- \$150 million for 80 projects under the *Regional Tourism Investment Fund* grants program to increase visitation to Victoria, dispersal across regional Victoria, and visitor yield by developing and delivering strategic tourism infrastructure projects and leveraging private sector investment.
- \$10 million for an Enabling Tourism Fund that will support the development of a pipeline of strong, market-ready tourism products.
- \$30 million under the Regional Tourism Infrastructure Projects program for nine key infrastructure projects in regional Victoria to stimulate local economic activity.

The Australian Government can focus on new world class experiences that are sustainable competitive strengths for Australia. The key experience pillars that provide significant opportunities for growth in Victoria are: nature; food and drink; wellness; arts and culture; First Peoples' led experiences; design, fashion and retail; and sport and events. Foundational principles for sustainable tourism include creating products that protect and give back to the natural environment. There are opportunities for further investment in self-determined First Peoples' tourism that encourages international visitors to connect with Australia's storied heritage.

Case study 2: First Peoples Tourism – Budj Bim Cultural Landscape

The Victorian Government has invested in First Peoples' led tourism experiences developed in consultation with Traditional Owners, Local Government and Parks Victoria. Budj Bim Cultural Landscape is one of just 20 UNESCO World Heritage sites across Australia - and the only site to be listed for its Indigenous cultural values. The Victorian Government is ensuring Budj Bim grows to become a truly iconic regional tourism attraction, with \$12 million invested in new infrastructure across the landscape to protect its important historical and cultural value.

Works include a new eel aquaculture and information centre, art installations, new raised walkways, a new cantilevered lookout, an upgraded information centre, entrance infrastructure, carparks and interpretive signage. The works will help bring more visitors to the region, ensuring more people hear the incredible stories of the Gunditjmarra People.



Case study 3: Wellness Tourism – Peninsula Hot Springs

Victoria is harnessing the global rise of wellness tourism by developing the Great Victorian Bathing Trail. Visitors can experience Australia’s rich and ancient hot springs culture.

Peninsula Hot Springs is a natural geothermal mineral springs and day spa facility located less than 90 minutes from Melbourne. Conveniently located within reach of Melbourne’s multicultural communities, many of which carry hot springs traditions from their homelands, Victoria’s regional areas are poised to greatly benefit from proposed developments. The cool temperate climate and associated winter ‘offseason’ periods can be flipped to advantage.

The Victorian Government is making a \$3.3 million contribution to the \$10.3 million project through the Regional Tourism Investment Fund. The project will deliver three new eco-lodges, a housekeeping hut, three massage rooms, a new undercover dining area, a new relaxation lounge, and supporting infrastructure.

The proposed expansion of accommodation and wellness activities at the existing Peninsula Hot Springs is expected to increase visitation to approximately 70,000 guests per year and increase average spend per guest from \$88 per guest to more than \$101 per guest by 2025-2026. The project is expected to create 242 jobs during construction and support 31 ongoing roles.

Peninsula Hot Springs is one destination as part of a planned wellness trail on Victoria’s south coast intended to rival other global multi-destination experiences.

Case study 4: Nature Based Tourism – Grampians Peak Trail

The Grampians is emerging as Victoria’s next ‘Great Ocean Road’ following sustained planning and careful investment. The Grampians Peak Trail – a unique 160 kilometre natural and cultural hiking experience – has provided a much-needed boost to western Victoria’s regional economy, unlocking private investment, and anchoring the destination.

The \$33.2 million project was delivered through a \$23.2 million investment from the Victorian Government and \$10 million from the Commonwealth Government through Horsham Rural City Council. By 2025, 34,000 walkers a year are expected to experience the precious natural and cultural values of the Grampians (Gariwerd) National Park, generating \$6.4 million in economic benefits and tourism development opportunities.

The Victorian Government is also investing in other areas of the park with a \$7.8 million upgrade to the popular MacKenzie Falls visitor area, a \$5.8 million upgrade to Brambuk – the National Park and Cultural Centre, and \$5.5 million for more access points to the trail.

Industry Excellence

Victoria is focused on building a strong and resilient industry, where businesses are enabled to succeed in the modern visitor economy. There are opportunities for industry strengthening, to encourage businesses to adapt to new market conditions and changing consumer demands, engage more effectively with consumers and develop innovative tourism products. Victoria has invested in digital capability for small businesses, such as connecting to sales channels, promoting businesses and regions, and understanding markets.

Global uncertainty

Global uncertainty reached high levels at the beginning of the COVID-19 pandemic and remains elevated. These risks and uncertainties could continue to dampen Australia’s international tourism performance. As a long-haul destination, Australia is particularly vulnerable to the continued delays in restoring aviation capacity and uncertainty surrounding air travel. Inflation both in Australia and overseas has also increased the cost of international travel to Victoria, and negatively impacted the discretionary spend of international visitors. These impacts could encourage international visitors to reconsider visiting Australia in favour of closer, cheaper destinations.

Prospects

Despite some uncertainties, the prospects for international tourism are positive. There is a strong pent-up demand to travel now that restrictions on travel have eased. Australia has maintained its appeal as a safe, aspirational destination. International visitors to Australia are expected to return to pre-COVID-19 levels in 2025, with a projected 11.0 million visitor arrivals in Australia by 2027, while international spend is projected to exceed pre-pandemic levels by 2024². Addressing priority supply issues, enhancing the visitor experience, and engaging emerging markets will enable Australia to meet the projected numbers of international visitors.

2. The effectiveness of recent tourism campaigns overseas

In 2020 and 2021, Visit Victoria maintained a presence in key international markets to build momentum and consideration of Victoria as a travel destination. The Get Set to Melbourne campaign was also integrated throughout domestic and global broadcasts and featured on the Australian Open's on-site screens. In March 2022, Visit Victoria increased its marketing activity in key international markets where no quarantine restrictions were in place for returning holiday travellers, consistent with Tourism Australia's approach. In Victoria, the value of international media generated was \$44.5 million (year ending 30 June 2022).

International tourist numbers have remained well below pre-pandemic levels since the reopening of borders in February 2022. Chinese and Australian travel restrictions on travel from China, Australia's largest source market, have only recently been lifted entirely, which has contributed to this slow return of international visitors. It is anticipated international visitors to Australia will return to pre-COVID levels in 2025³. The recovery of international arrivals to Australia is expected to be uneven across visitor markets, with the strongest recovery expected from New Zealand, India and USA. Expansion is expected from more established Asian markets such as Singapore, Hong Kong, Malaysia, Indonesia and Korea, and fast-growing emerging markets like the Philippines, Thailand, and Vietnam.

Competition for the international visitor continues to be incredibly strong. It is important Australia continues to be represented and marketed as a multi-stop destination. Historically, Commonwealth Government-led international campaigns have presented a homogenous picture of the visitor experience of Australia, with an emphasis on beaches and the outback. While nature-based travel is a strategic advantage for Australia, Visit Victoria has developed a profile of Victoria's target international visitor markets. These high value travellers are seeking layered experiences in both cities and regional areas. This presents opportunities for joint promotions between the Commonwealth Government and states on new travel routes, events attractions, longer travel packages and itineraries.

3. Promotion of regional Australia as a world class international travel destination


There has been a significant and appropriate focus on promoting regional tourism during recovery. Victoria's VERRP has been informed by the findings of the [Regional Tourism Review](#)⁴, which identified opportunities to grow tourism in regional Victoria. The implementation of the recommendations of the Review are increasing Victoria's regional offerings and accelerating recovery. In 2021-2022, in an environment with limited international travel, domestic overnight spend in regional Victoria was eight per cent higher than the pre-pandemic performance, at \$7.8 billion. Intrastate overnight expenditure to regional Victoria increased 6 per cent compared to the pre-pandemic period (year ending December 2019). Victoria's regional tourism offering is strong, but we can further promote its strengths in natural attractions, arts and culture, epicurean experiences, and sport and events to the international market.

To promote regional Australia, Victoria is creating a supportive environment that incentivises investment in tourism experiences, events, and attractions. Key market gaps and opportunities in Victoria include new avenues for visitor participation and spending (regional visitor facilities, nature based and First People's tourism products), expanding specialisations (culinary experiences in regional areas, wellness and luxury experiences), longer stays (regional accommodation and connected experience) and growing industry capability.

² Tourism Research Australia, Tourism Forecast 2022, published December 2022

³ Tourism Research Australia, Tourism Forecast 2022, published December 2022

⁴ https://djsir.vic.gov.au/data/assets/pdf_file/0005/1987367/Regional-Tourism-Review-Consultation-Findings.pdf



There are also significant opportunities to increase the tourism benefits of events, including dispersal of visitors, length of stay and yield. Large scale, high value events are mostly concentrated in Melbourne with opportunity to extend their impact throughout the state. Victoria's renewed investment of \$20 million in the [Regional Events Fund](#)⁵ will support regional events across the state over four years. Victorian Government investment in regional capability and capacity would benefit from the Australian Government attracting more business and major events to the regions.

In 2026, the Victorian regional hubs of Geelong, Bendigo, Ballarat, Gippsland and Shepparton will host the Commonwealth Games. The Games will feature a program of cultural and business engagement experiences including a state-wide and integrated program of attractions and events, welcoming visitors to every corner of the state.

The legacy of the Games will demonstrate the benefits of hosting major events in regional communities. Victoria 2026 will build social and affordable housing, world-class sporting facilities, attract future sporting events to regional Victoria, and enhance community use of sporting facilities.

Australia's regional tourism growth requires strong offerings from cities, both as key transport links and as drivers of economic growth from migration and international students. However, to date, the key markets of Melbourne and Sydney have been undervalued as key drivers of tourism to both domestic and international markets. Victoria relies heavily on Melbourne to power its visitor economy. The Victorian Government is working with the City of Melbourne to support its recovery and growth following the COVID-19 pandemic, including through the \$200 million Melbourne City Revitalisation Fund. Investment in capital cities will drive awareness of events, press and PR, business, and house international students.

4. Role of Australia as a hub in support of tourism in the Asia Pacific region

Australia is yet to establish itself as a hub in the Asia Pacific region, relative to highly developed and centrally located economies such as Singapore and Tokyo. Instead, Australia has been seen as a destination endpoint based on the practicalities of international aviation.

As future growth is more likely to come from emerging Asian economies like India, Vietnam, Malaysia, and Indonesia, Australia can plan for the years ahead by building strong major, regional, and business events calendars and innovative marketing activities. These include marketing upcoming world class events (Brisbane 2032 Summer Olympics, FIFA Women's World Cup, Sydney WorldPride 2023) to extend their impact throughout the Asia Pacific and encourage multi destination visitation.

Support for the business events sector will help build confidence with planners and key decision makers across Australia to plan and book their events in. The Victorian Government helped to fuel the business event industry's revival by hosting the first international tradeshow since Australian international borders reopened – the Asia-Pacific Incentives and Meetings Event (AIME). From 21-23 March, AIME 2022 brought together more than 2,000 local and international buyers to access 225 exhibitors from around the world. Business events are a high yield of the visitor economy and over one million international business visitors to Australia are expected by 2027. Through the Business Events Program, Victoria will provide \$42.9 million over four years (2021-25 inclusive) to support the attraction of business events to the State.

Australia can also drive future growth in the Asia Pacific market by leveraging strong Visiting Friends and Relatives (VFR) connections and international education. The New Zealand market is expected to return to pre-COVID levels faster than other markets due to its proximity and strong ties with Australia, which will drive VFR travel, as well as the strong rate of return in aviation capacity on the trans-Tasman route. The Indian visitor market to Australia is expected to almost be back at pre-COVID-19 levels by the end of 2023 (97 per cent of 2019) to reach 457,000 visitors by 2024. Victoria is expected to maintain its high market share of Indian visitors to Australia, fuelled by a strong rebound in aviation connections, VFR visitation and recovering international education.

⁵ <https://corporate.visitvictoria.com/events/regional-events/regional-events-fund>

Case study 5: International Cricket Council (ICC) Men's T20 World Cup

The Men's T20 World Cup was held in Australia for the first time from 16 October to 13 November 2022 with 16 international teams competing. Victoria hosted 13 matches, including the opening game in Geelong and the final in Melbourne. Study Melbourne leveraged the event with specific activation for the South Asian student market, including a fan activation zone, to promote Victoria as a tourism and study destination to international visitors. From a broadcast perspective, the overall cumulative global dedicated TV audience for Australia 2022 was 1.28 billion. A total of 3.95 billion hours of the event was watched, including 365 million viewing hours on digital streaming platforms. Live streaming consumption increased by 149 million viewing hours from the previous Men's T20 World Cup.

5. Other related matters

There is an opportunity for government and industry to work together to improve existing and coordinate new research and data insights. Data and insights are key enablers to drive robust decision-making, however, the absence of Australian Government investment and coordination in this area is creating inefficiencies. Increased investment in traditional tourism indicators, such as the International and National Visitor Surveys, and better coordination of new and emerging data would support informed private and public investment.

International education sector

Background

Victoria's international education sector

International education is Victoria's largest single export and its largest services export. In 2019, prior to the COVID-19 pandemic, the sector generated \$13.7 billion in export revenue, comprised around half of Victoria's services exports, and contributed around 63,000 full-time equivalent (FTE) jobs in Victoria.

Around one-third of Australia's international students choose Victoria for an education. In 2019, the state welcomed 250,000 students⁶ from around 160 countries. Victoria's share of total international student enrolments in Australia has remained steady at around 30 per cent in the last 20 years, reaching a peak of just over 307,000 enrolments in 2019.

In addition to revenue and jobs creation, international education has many flow-on benefits for the Victorian economy. The sector supports Victoria's aviation, accommodation and hospitality industries through goods and services consumption. International education also makes a significant contribution to Victoria's visitor economy. Pre-pandemic (2019), international education visitors accounted for 46 per cent of all international visitor expenditure in Victoria and contributed to the visiting friends and relatives (VFR) segment. According to [Tourism Research Australia](#)⁷, in 2017, one in seven VFR travellers reported visiting a student or relative studying in Australia.

The impact of COVID-19

In 2021, Victoria's education exports dropped to \$6.9 billion, a decline of 34 per cent compared to 2020 and a decline of 50 per cent compared to 2019. In 2021, international student enrolments⁶ fell by 27 per cent, compared to 2019, to just over 227,000. In the same period, Victoria's international student commencements⁶ dropped nearly 50 per cent, down to 86,600.

In response to the impacts of the pandemic, which were felt across the entirety of Victoria's international education sector, the Victorian Government provided the largest support package of any Australian state or territory. Notable investments included: the \$33.4 million [International Education Short-Term Recovery Plan 2020-21](#)⁸; the \$45 million [International Student Emergency Relief Fund](#)⁹; the \$50 million [International Education Resilience Fund](#)¹⁰; and the \$350 million [Victorian Higher Education State Investment Fund](#)¹¹. Between 2020-2022, the Victorian Government provided \$2.5 million in food relief for more than 66,000 students from over 130 countries and, through the Study Melbourne Hub Victoria, supported more than 10,000 students with complex case work, free legal aid, financial relief and referrals.

Multiple missed intakes of international students as a result of the pandemic and prolonged border closures will require years to flow through the system. This disruption to the international student pipeline will continue to impact the pace of recovery, with declines in student commencements since the beginning of the pandemic impacting overall student enrolment numbers. One example of this is the flow on effects of a significant reduction in students enrolled in English Language Intensive Courses for Overseas Students (ELICOS). Victoria's ELICOS providers, which rely heavily on international student enrolments, saw a drop of 77 per cent in student numbers between 2019

⁶ Student number data represents an estimated head count of individuals that have studied on a student visa within a reference period. International student enrolments and commencements are a measure of the study activity a student does while on a student visa, and since a student can study more than one course in multiple sectors in a reference period, the enrolment and commencement count will always be greater than the student count. See <https://www.education.gov.au/international-education-data-and-research/international-student-numbers-country-state-and-territory>


⁷ https://www.tra.gov.au/ArticleDocuments/242/IVS_one_pager_Dec2017_FINAL.pdf

⁸ https://www.studymelbourne.vic.gov.au/_data/assets/pdf_file/0032/156758/International-Education-Short-Term-Recovery-Plan.pdf

⁹ <https://www.premier.vic.gov.au/emergency-support-victorias-international-students>

¹⁰ <https://www.premier.vic.gov.au/backing-victorian-universities-when-they-need-it-most>

¹¹ <https://www.vic.gov.au/support-package-universities>



and 2021¹². The drop in ELICOS enrolments is likely to impact the recovery of the sector as a whole, given around 70 per cent of ELICOS students on student visas have historically transitioned to further studies in the schools, vocational education and higher education sectors¹³.

There are several factors impacting the return of international students to pre-pandemic levels in the short to medium term. These include reputational damage as a result of the perceived lack of support for international students during the pandemic; travel constraints due to limited aviation supply and affordability; local COVID-related policies; visa processing issues; and increased international competition.

Ongoing impacts from the pandemic and prolonged border closures signal a slow recovery for the sector. While the recovery trajectory for the sector is not yet clear, there are positive signs that Victoria is well positioned to return to growth. As at 14 November 2022, 80 per cent of Victorian student visa holders were located onshore (around 106,400 students), and 20 per cent offshore (around 26,100 students). Nearly 50 per cent of Victoria's student visa holders located offshore were from China (12,500 students). Compared with data prior to Australia's borders re-opening to international students (15 December 2021), Victoria's proportion of onshore students has increased by 24 percentage points, up from 56 per cent, or 38,100 additional students onshore.

Victoria's International Education Recovery Plan

Victoria's International Education Recovery Plan 2025 (the Recovery Plan) released in September 2022, outlines the Victorian Government's strategy to drive international education sector recovery and growth. Supported by \$52.9 million in funding over four years, the Recovery Plan articulates a vision of Victoria as a global leader in education, recognised for quality, innovation and inclusion. This vision is supported by three goals, five pillars, and 19 actions. The Recovery Plan is appended at Attachment A.

Informed by extensive consultation across the international education sector, [Victoria's International Education Advisory Council](#)¹⁴ and multiple tiers of government, the Recovery Plan reflects the Victorian Government's vision and strategy for the sector, including initiatives that will build Victoria's performance as a leader in education excellence and student experience in a post-pandemic context.

Response to the Inquiry Terms of Reference

1. Challenges associated with the loss of international student numbers as a result of the significant disruption caused by the COVID-19 pandemic and effective measures to attract and retain students to Australia

Challenges associated with the loss of students

The financial impact of COVID-19 is uneven for different types of education providers due to the larger numbers of international student enrolments in some sub-sectors, and varied proportions of international enrolments, relative to domestic student enrolments, across international education sub-sectors. In 2019, around half of Victoria's international enrolments were in higher education, followed by vocational education and training (28 per cent), English language training (15 per cent), non-award courses (4 per cent), and schools (3 per cent). Prior to the pandemic, revenue from international students accounted for 27 per cent of university revenue. As such, universities are heavily impacted in terms of volume, facing significant challenges relating to their revenue model and the required workforce adjustments¹⁵. Private providers across several sectors, particularly those which have a higher proportion of international student enrolments relative to domestic enrolments, such as ELICOS, are reporting similar impacts.


International students and graduates support Victoria's skills and workforce needs through employment during and after graduation, and high calibre international graduates can contribute to addressing Victoria's knowledge and skills gaps. In 2021-22, 88 per cent of all Victorian Government nominated skilled migrants held an Australian

¹² Economic impact of COVID-19 on the ELICOS sector in Victoria, English Australia 2022 (commissioned by the Victorian Government).

¹³ <https://www.education.gov.au/international-data/data-visualisation-education-pathways>

¹⁴ <https://www.studymelbourne.vic.gov.au/industry/news-and-updates/international-education-advisory-council>

¹⁵ Forward impact of COVID-19 on Australian higher education, Australian Government Tertiary Education Quality and Standards Agency 2022, <https://www.teqsa.gov.au/sites/default/files/forward-impact-of-covid-19-on-australian-higher-education-report.pdf>



qualification (around 3,300 applicants). For the first half of 2022-23, around 64 per cent of nominees held an Australian qualification¹⁶. The loss of international students has exacerbated labour market shortages in Victoria, notably in professional graduate positions and the hospitality and tourism sectors. Coordinated recovery efforts across all levels of government are required to mitigate the risk of Australia and Victoria losing global talent to competitor study destinations.

International students also contribute to Australian businesses through goods and services consumption. Across Australia, an estimated \$5.5 billion – equivalent to 36 per cent of international student annual expenses – goes towards retail and hospitality. A further \$5.5 billion is spent on property. Local cafes, supermarkets, entertainment venues, and student accommodation providers, have been impacted by the loss of international students, particularly in suburbs that had a high proportion of international students pre-pandemic. In 2019, international students made up more than 10 per cent of the resident population in 11 Melbourne suburbs, including Melbourne's CBD, where 38 per cent of the resident population was international students¹⁷.

Challenges associated with a decline in student numbers go beyond losses in economic terms. International students are critical to Victoria's diversity and vibrancy, enriching its social and cultural fabric and supporting more inclusive communities. The impact of declining international student numbers has been felt across Victoria's cities and regions.

Measures to attract and retain students

Key to attracting the best and brightest students to Victoria is to maintain and promote the quality of the education offering and a positive student experience. These are important elements of Victoria's value proposition that contribute to positive international student sentiment, and increase the propensity of international students, alumni and diaspora to recommend Victoria as a preferred study destination.

Elevating Victoria's reputation in education, training and research excellence is clearly outlined in Victoria's Recovery Plan as one of the three goals for the sector through to 2025, supported by three actions under *Pillar 3 – Promotion of Victoria's offering* (see Attachment A, pp. 22-23). In addition to promoting Melbourne's education offering and its status as Australia's Best Student City¹⁸ and most liveable city¹⁹, Study Melbourne, through its innovative marketing campaigns, also promotes the strength of regional Victoria's offering. Study Melbourne is leveraging opportunities afforded by Victoria's hosting of the 2026 Commonwealth Games in Geelong, Bendigo, Ballarat, Gippsland and Shepparton to profile the diverse study options, affordable lifestyle, cutting-edge facilities and strong industry linkages offered by education providers in Victoria's regions. Victoria's [Global Education Network](#)²⁰ (see Attachment 1, pp. 24-27) also plays a critical role in promoting Victoria as a world-leading study destination and the capability of Victoria's international education sector across key markets.

Another important measure to attract and retain the best and brightest global talent is to enhance student employability and ensure that competitive post-study work rights are enabled through prudent adjustments to migration policy settings. Outstanding international students and graduates are likely to become more employable if equipped with relevant industry connections and a good understanding of Australian work culture. This is why the Victorian Government places a strong focus on student employability and return on investment – and has made this a key pillar of the Recovery Plan (Attachment A, pp. 20-21). Section 3 below provides a brief overview of key Study Melbourne programs and initiatives that support international student employability and graduate employment outcomes. The Victorian Government welcomed the expansion of post-study work rights for graduates with select degrees in areas of verified skills shortage, and additional funding to resolve the visa backlog, announced by the Commonwealth Government at the Jobs and Skills Summit in September 2022.

¹⁶ Note that in 2021-22 only onshore skilled migrants were eligible to apply for state nomination given border closures due to Covid. In 2022-23 the Victorian Government's state nomination visa was re-opened to offshore applicants and continued to be available to onshore applicants.

¹⁷ Issues Paper: International students vital to Coronavirus Recovery, Peter Hurley, 2020

<https://www.vu.edu.au/sites/default/files/mitchell-institute-issues-brief-international-students-2020.pdf>

¹⁸ QS Best Student Cities 2023

¹⁹ Economist Intelligence Unit Global Liveability Index 2022

²⁰ <https://global.vic.gov.au/our-programs-and-services/international-education/global-education-network>

2. Online innovations in education delivery and potential opportunities to strengthen the sector's resilience

The return of international students and student visa application rates are evidence of the fact that a strong market remains for onshore international education in Victoria and Australia. However, given student expectations for flexibility and choice have increased, the sector must think creatively about how to engage effectively with students through online and hybrid offerings. Online education should be seen not as a substitute for on-campus study, but rather an avenue to grow the overall number of international students from diverse market segments studying an Australian qualification and strengthen the sector's resilience in the long-term. Victoria, as home to high-quality education institutions and a leading hub for innovation and digital technology, is well-positioned to address the opportunities to grow the overall international education sector through online education.

Case study 6: Melbourne, Victoria as Australia's EdTech capital

With the highest concentration of top EdTech companies in the region²¹, Victoria is the education technology (EdTech) centre of Australia. Victorian EdTech companies account for 40 per cent of the revenue generated by all the companies in the [HolonIQ Australia and New Zealand EdTech 50](#). Victoria is also a hub for online learning, with Open Universities Australia, Keypath, Online Education Services, Pearson Education, Coursera and other leading Online Program Management companies (OPMs) and online learning providers based in Melbourne. OPMs, which assist education providers to deliver courses online, are a key part of Victoria's education ecosystem (see Attachment A, p. 12).

Victoria's global EdTech capabilities are centred on education leadership, enhanced capabilities to deliver global education solutions, and a strong reputation in the international education sector.

Victoria's [offshore Study Melbourne Hubs](#)²², which support students studying online offshore and through transnational education partnerships, also provide a platform to showcase the State's education innovation thought leadership and connect EdTech companies with in-country partners.

Victoria's Recovery Plan commits to continuing activities, events and trade programs which reinforce Victoria's reputation as Australia's EdTech, digital learning and education innovation leader, including Melbourne EdTech Week (see Attachment A, p. 26). Through Global Victoria, the government will continue to build on significant investment to date to develop Victoria's EdTech and digital learning ecosystem, including through programs, events, research and thought leadership.

While there is a clear difference between emergency online teaching born out of necessity and high-quality online education innovation, the adoption of online and hybrid delivery models has been accelerated by the pandemic and lifted visibility on the flexible delivery options that online learning affords. Young international students are digital natives with increased expectations to study some, part, or all of their course online or offshore, at various points of their qualification.

Opportunities also exist to reach a broader spectrum of students and untapped market segments, considering different demographics (e.g., mid-career professionals), delivery price points (appropriately adapted for the country, course and delivery mode), and personal preferences (e.g., non-award and short courses versus full qualifications).

²¹ In 2021, Victorian EdTech companies accounted for more than a third of the EdTech companies in the HolonIQ Australia and New Zealand EdTech 50. <https://www.holoniq.com/notes/2022-australia-new-zealand-edtech-50>

²² The Victorian Government has established physical Study Melbourne Hubs in China, Vietnam and Malaysia, a hybrid hub in South Asia, and a pop-up hub for key student engagement activities in Latin America. See <https://www.studymelbourne.vic.gov.au/Hubs>

Case study 7: Victoria leading the way in digital micro-credential development for offshore delivery

In 2021 the Victorian Government engaged the Victorian TAFE Association to work with Victorian TAFEs to develop non-accredited digital micro-credentials for an international audience, in consultation with industry. The project has involved the development of a micro-credential framework and a user guide for course developers to ensure the micro-credentials developed are of a consistent high quality.

A suite of 30 micro-credentials has been developed and will be launched in early 2023. The courses, cover a range of topics across building and construction, professional development for teachers, health and community, cybersecurity and the internet of things, sustainable agriculture, and hospitality and tourism. The micro-credentials aim to meet offshore demand for short online courses to upskill workers and to position Victorian TAFEs and dual sector universities as leaders in online offshore delivery. These products will act as 'taster courses' to attract potential new international partners and international students. The micro-credential framework also has potential to assist other nations build capacity in micro-credential development and quality assurance.

Offered at scale, online education also enhances accessibility. A strong market for online education products exists amongst students who are unable to travel overseas, or who are unable to afford a premium in-country experience, and are looking for more accessible and flexible options. One example of the potential scale of the online education opportunity is the rapidly growing demand for tertiary education in Africa and the potential for online education to address such demand. According to the United Nations, by 2030, 42 per cent of the world's youth aged 15-24 will live in Africa. However, many African countries do not currently have adequate tertiary education capacity to meet this demand and study abroad remains a luxury for many households²³.

The Victorian Government welcomes more flexibility around online, hybrid, and offshore education delivery models as a timely response to shifting student preferences and varying student needs. Providing such flexibility supports Victoria and Australia's competitiveness amidst increased global competition and enables Victoria's world leading EdTech companies and education providers to maximise opportunities for education innovation. However, Victoria and Australia must ensure that quality remains at the forefront of its value proposition for international students, whether they are studying online, hybrid or in-person.

3. Initiatives to ensure positive international student experience and support pathways to build their skills and contribute to Australia's prosperity

Remaining a leader in the student experience and student return on investment is another key goal for Victoria's international education sector through to 2025. This goal is supported by eight actions under the Recovery Plan through *Pillar 1 – The student experience*, and *Pillar 2 – Employability and student return on investment* (see Attachment A, pp. 18-21).

Through Study Melbourne, the Victorian Government offers programs and support that are available throughout the international student journey with Victoria (Attachment A, p.10). Students have equitable access to inclusive services, ranging from pre-departure briefings and welcome programs to wellbeing support, employability initiatives and alumni engagement. With the establishment of offshore Study Melbourne Hubs²², Victoria's international students in select markets also have access to tailored student programs to support their study and career journey.

²³ Diversifying student recruitment – Africa focus, Studypartals and Eduquator 2020, <https://studypartals.com/intelligence/diversification-of-student-recruitment-africa-focus/>

Case study 8: The Study Melbourne Empowered Series

[The Study Melbourne Empowered Series](#)²⁴ is a Victorian Government initiative investing in student empowerment and leadership development beyond the classroom. Offered free of charge through a suite of employability, leadership and entrepreneurship programs co-designed by students, for students, the series uses a strengths-based approach to enhance student employability. Four key program areas include leadership and volunteering; equality and inclusion; digital skills and innovation; and employability and entrepreneurship. The series has supported more than 9,500 international students since 2020.

Some key programs under Empowered include:

- [Future Founders](#)²⁵: Australia's largest entrepreneurial program for international students and aspiring new founders, providing venture sponsorships for student start-ups, connecting them with the start-up ecosystem and showcasing their business potential.
- [Career Catalyst](#)²⁶: A comprehensive employability and career development program aimed at empowering international students to unleash their career potential, providing career coaching services, networking events and employability workshops.
- [Leadership Labs](#)²⁷: Realising and nurturing social entrepreneurship and community leadership skills of international students, building their professional capability and expanding their networks.

Recognising the importance of post-study outcomes for international students, improving employment outcomes for international students and graduates is another key priority for the Victorian Government. Currently, there is disparity in graduate outcomes between international and domestic students, with 43 per cent of Australia's international undergraduates in full-time employment 4-6 months after graduation compared to 69 per cent for domestic graduates²⁸. While highly capable, international students and graduates can often be excluded from equal employment opportunities in Australia due to standardised recruitment practices and perceived barriers. Through [Victoria's Commitment to Action](#)²⁹, the Victorian Government is working closely with employers, industry associations and education providers to address employment barriers and promote post-study career pathways for global talent. Victoria aspires to providing high-calibre international graduates with access to excellent global career possibilities in their chosen fields either in Victoria, back home or in their destination of choice.

²⁴ <https://www.studymelbourne.vic.gov.au/empowered-series>

²⁵ <https://www.studymelbourne.vic.gov.au/news-updates/study-melbourne-future-founders-program>

²⁶ <https://www.studymelbourne.vic.gov.au/empowered-series/career-catalyst>

²⁷ <https://www.studymelbourne.vic.gov.au/empowered-series/leadership-labs>

²⁸ QILT Graduate Outcomes survey 2021 [https://www.qilt.edu.au/surveys/graduate-outcomes-survey-\(gos\)](https://www.qilt.edu.au/surveys/graduate-outcomes-survey-(gos))

²⁹ <https://www.studymelbourne.vic.gov.au/industry/news-and-updates/improving-international-student-employment-outcomes>

Case study 9: Victoria's Commitment to Action – improving international student employment outcomes

In October 2022, the Victorian Government launched *Victoria's Commitment to Action: Improving international student employment outcomes*. The Commitment was a key outcome of an industry roundtable on international student employment convened by DJSIR in May 2022 at the recommendation of Victoria's International Education Advisory Council.

Informed by insights from leaders across local and international businesses, industry peak bodies and education providers, the Commitment outlines five straightforward actions employers can take to improve pathways to relevant and quality employment opportunities for international students and graduates in Victoria:

1. **Employ more** – Employ more international students and graduates in their fields of expertise.
2. **Offer more work experience** – Facilitate international students' access to quality and relevant work experience to build your talent pipeline and organisational diversity.
3. **Set targets** – Make it part of your organisation's goals by setting targets, or better still make an individual or team accountable for it.
4. **Remove barriers** – Identify and resolve any real or perceived barriers within the organisation and seek professional legal/migration advice as necessary.
5. **Share success stories** – Publicly share employment statistics, stories of success and/or advice for other employers.

The full list of participating organisations to date can be found on the Study Melbourne Industry page²⁹.

Other key initiatives of the Victorian Government to ensure a positive student experience and support employment outcomes include:

- [Study Melbourne Hub Victoria](#)³⁰ – (formerly the Study Melbourne Student Centre), established in 2004 and based at 17 Hardware Lane, Melbourne, providing timely information and confidential, free case-work support and programs and events for international students in Victoria.
- [Offshore Study Melbourne Hubs](#)²² – connecting and engaging current, prospective students and alumni across China, Vietnam, Malaysia, Latin America and South Asia, while offering a dynamic space free of charge for Victorian international education stakeholder engagements in-market. This industry leading initiative was recognised as a finalist and Highly Commended at the PIEoneer Awards 2022 (Student Support category).
- [International Student Employment and Accommodation Legal Service](#)³¹ – based out of the Study Melbourne Hub, Victoria, providing students with free and confidential legal advice on employment or accommodation concerns.
- International Student Travel Pass – improving affordability and access to public transport by offering discounts for eligible international students in Melbourne and regional Victoria. New program to be launched in early 2023.
- [Study Melbourne Inclusion Program](#)³² – promoting the wellbeing of international students, including through activities that support greater inclusion of women, LGBTIQ+ communities, people of colour and all faiths, people with disability and those from a broad spectrum of socio-economic backgrounds.

³⁰ <https://www.studymelbourne.vic.gov.au/study-melbourne-student-centre>

³¹ <https://www.studymelbourne.vic.gov.au/living-here/legal-support/ISEALS>

³² <https://www.studymelbourne.vic.gov.au/industry/programs/study-melbourne-inclusion-program>

4. Opportunities for international education to support strategic and foreign policy objectives

Founded on long-lasting people-to-people links and institutional partnerships, international education is uniquely placed to be an enabler of strategic and foreign policy objectives. Through research collaboration in areas of mutual benefit, staff and student mobility, or joint training programs, the sector promotes not only Victoria and Australia's education and research credentials but also Victoria and Australia's values and way of life. The [Study Melbourne Research Partnerships Program](#)³³ (an initiative under the International Education Short-Term Recovery Plan 2020-21⁸, delivered in partnership with VESKI) is an outstanding example. Driving 15 strategic joint research projects between Victorian institutions and their international partners, the program helped establish new institutional partnerships and deepened existing collaborations across key priority areas, including renewable energy, artificial intelligence, social inclusion.

Thanks to the significant reach of Victoria's [Global Education Network](#)²⁰, which is embedded within the Victorian Government's Trade and Investment (VGTI) overseas office network (see Attachment A, pp. 24-27), Victoria is well-positioned to contribute to strategic and foreign policy objectives. The VGTI network seeks to maximise education, trade and investment outcomes for Victoria through building global connections, supporting Victoria's inbound and outbound delegations and trade missions as well as high-level visits, bilateral and multilateral events and fora, and international expos. Dedicated education representatives based at VGTI offices also foster meaningful alumni engagement, recognising international alumni as excellent ambassadors for Victoria and Australia.

Case study 10: Victoria-Abu Dhabi research and investment partnership

The Middle East, Türkiye and Africa region is one of Victoria's major markets, with total two-way merchandise trade valued at \$4.7 billion in 2021-22. Healthcare and research innovation has emerged as a key area for collaboration, thanks to greater demand for improved health access and high-quality basic care³⁴.

A recent example of collaboration in an area of mutual interest is the Memorandum of Understanding between the Victorian Government and the Abu Dhabi Department of Health aimed at progressing joint RNA research and investment in manufacturing capability. This partnership will also facilitate knowledge exchange and sharing across Victorian universities, research institutes and industry.

Case study 11: Vietnam-Australia Education Forum


On the occasion of the visit to Australia by the President of Vietnam's National Assembly, Mr Vuong Dinh Hue, the Victorian Government hosted the Vietnam-Australia Education Cooperation Forum on 2 December 2022, in collaboration with the Commonwealth Government and Vietnamese Ministry of Education and Training.

Attended by senior government officials and education executives from 20 Australian and 16 Vietnamese universities, the Forum provided a platform to explore collaboration opportunities in research, student and staff mobility, quality assurance and internationalisation. The Forum also highlighted the strength of bilateral education collaboration between Australia and Vietnam, with 12 higher education agreements exchanged at the event, including five from Victorian universities.

Victoria enjoys a strong and long-standing education relationship with Vietnam. Vietnam is Victoria's 5th largest international student market and has consistently ranked as one of Victoria's top 5 student markets for over a decade. Victoria has Australia's largest proportion (over 40 per cent) of Vietnamese students. In 2021, there

³³ <https://www.studymelbourne.vic.gov.au/industry/programs/research-partnerships>

³⁴ <https://global.vic.gov.au/explore-our-global-markets/middle-east-turkey-and-africa/middle-east,-turkiye-and-africa-meta-regional-insights-spring-2022-accessible>



were approximately 9,600 Vietnamese students enrolled with Victorian education providers, with 57 per cent studying in higher education.

There are opportunities to align international education offerings with areas of strategic focus and competitive advantage for Victoria and Australia. For example, Victoria's Study Melbourne Hubs harness Victoria's reputation as a global leader in major events, hosting student and industry engagement activities alongside the Australian Open, Melbourne Fashion Festival, and the Australian F1 Grand Prix.

Additionally, the Victorian Government welcomes new opportunities arising from bilateral and multilateral trade agreements with strategic partners, recognising the key role education plays in enabling mutually beneficial economic outcomes. Thanks to agreements such as the Indonesia-Australia Comprehensive Economic Partnership Agreement (IA-CEPA) and the Australia-India Economic Cooperation and Trade Agreement (AI-ECTA), the global reach of Victoria's education and training ecosystem is set to further expand and its influence deepen. With improved market access and favourable policy settings, ample opportunities exist for Australian education providers to establish new models of transnational education or offshore campuses while contributing to social and economic development outcomes in the region.

Victoria's International Education

Recovery Plan 2025





Minister's Message

Victoria's international education sector is a major driver of exports and jobs, generating global opportunities and connections for the state.

Whether it's the neuroscience PhD graduate that has gone on to improve healthcare in their home country, the TAFE cookery graduate that became a sought-after food stylist upon their return, or the business graduates who founded a Melbourne tech unicorn that now operates around the world, these outcomes were made possible by the Victorian international education sector.

As with other industries across the state, the global pandemic has significantly impacted Victoria's largest services export.

The Victorian Government introduced initiatives to support the sector during this time, with more than \$180 million committed to sustaining Victoria's international education sector and its students.

With borders now open and students returning to Victoria, it's important that the sector takes the lessons from the pandemic and sets itself on a resilient path for the future.

Victoria's International Education Recovery Plan 2025 outlines the Government's vision, goals and actions to support the sector's recovery, backed by funding of \$52.9 million through to 2025.

Recovery doesn't mean a return to how things were before. Instead, the sector must adapt and change to ensure it can thrive in the longer term.

Victoria is recognised as a global leader in education due to its outstanding workforce, its record of innovation and its inclusion. But we cannot stand still.

We want a sector that embraces innovative teaching and learning approaches, drives collaborative research partnerships and prioritises positive student experiences – underpinned by strong industry engagement and global connections.

It will be up to everyone in the sector – governments at all levels, education providers, supporting businesses and students – to work together to achieve this goal.

I am pleased to launch *Victoria's International Education Recovery Plan 2025* and invite you to join me in celebrating this sector's incredible resilience and bright future.

Tim Pallas MP
Minister for Trade

Acknowledgement of Country

The Department of Jobs, Precincts and Regions acknowledges the traditional Aboriginal owners of country throughout Victoria, their ongoing connection to land, and we pay our respects to their culture and their Elders past, present and future.

We recognise and value the ongoing contribution of Aboriginal people and communities to Victorian life and how this enriches our society more broadly. We embrace the spirit of self-determination and reconciliation, working towards equality of outcomes and ensuring an equitable voice.

Student Message

Victoria is the best destination for international students.

Melbourne is where I accomplished my academic pursuits at world-class institutions. I obtained my Bachelor degree in 2017 and more recently completed my PhD at the Peter MacCallum Cancer Centre and Monash University – ranked number one in the world for Pharmacy and Pharmacology (QS 2022).¹

Victoria is a place that inspires innovation and inclusion. Like myself, many international students are eager for a bigger future and transformative opportunities, which are accessible in Victoria. With the support of Study Melbourne, I founded Future Female, a growing initiative that empowers, inspires and connects international students and diverse women with skills, networks and ideas.

Since 2018, Future Female has attracted more than 1,600 participants, many of whom have gone on to have significant impact. By raising the profile of female international students, Future Female assigns value to our cultural diversity and galvanises motivated women from around the world. Future Female also connects with Victorian business leaders who have become advocates for international student inclusion and success.

1. Quacquarelli Symonds (QS), QS World University Rankings by Subject 2022.

In addition to academic pursuits, the diverse and welcoming community in Victoria enables endless opportunities to explore your interests and talents. Through various leadership positions, I have worked with dozens of student volunteers. One of the highlights was in my role as National President of the Council of International Students Australia (CISA) in 2020-21, where I advocated for over 550,000 international students.

I came here to pursue an education, a dream and a future of my own.

You too can discover yourself in Victoria.

Dr Belle Lim

Cancer Genetics PhD
Victorian International Student of the Year 2019
Future Female Founder and Convenor
President, Council of International Students Australia 2020-21



About Belle

Belle Lim completed a PhD degree in cancer genetics at Monash University and Peter MacCallum Cancer Centre. In 2019, Belle won the Victorian Premier's Award for International Student of the Year and the Victorian International Education Award for Research International Student of the Year. Belle is Convenor and Curator of Future Female, a network where international students and culturally and linguistically diverse women are supported to thrive and advance gender equality, cultural inclusion and female leadership in Australia. Belle was a finalist in the Victoria Volunteering Leadership Award in 2022 and received a Gold Medal from Monash University in 2017. Belle currently works at Deloitte Access Economics, where she contributes to projects that help advance health and social policy in Australia.

The Education State

Victoria has long held the position of Australia's Education State. Victoria delivers exceptional student outcomes through its leading education ecosystem, which produces the knowledge, capabilities and skills that industries need and employers expect.

Victoria is committed to bringing its high-quality education offering to the world through its globally competitive universities, public network of Technical and Further Education (TAFE) institutes, private education and training providers, English language colleges, education technology (EdTech) companies and schools. Victoria's education and training sector has global reach, with international campuses and partners located across Asia, the Middle East, Africa, Europe and the Americas.

Victoria offers students an exceptional lifestyle within its safe and welcoming multicultural community. This is why Melbourne has repeatedly been ranked as Australia's best student city² and most liveable city³ – and among the best globally. Students from around 160 countries choose Melbourne and Victoria's regions for an education and graduate with the skills, experience and capability to become true global citizens. As an inclusive and open-minded society, Victoria provides a safe space for students to make a contribution, expand their mindset and discover new perspectives and opportunities.

Thousands of international students start their education in Victoria's schools, experiencing a world-class curriculum and pathways to higher education here and abroad. Victoria's research, innovation and entrepreneurship ecosystem⁴ attracts highly skilled international talent and investment. The state's innovation and employment precincts are where research institutes, businesses, accelerators and start-ups come together to connect and collaborate. Home to Australia's tech city and a leader in EdTech, Victoria delivers education and training designed for the future.

Victoria offers a global education, where graduates are equipped to meet the challenges of a complex world, excel in their chosen field and form enduring ties with international peers. Whether based in Victoria or in their home country – studying with Victoria is how global careers are launched.

2. QS Best Student Cities 2023.

3. Economist Intelligence Unit, The Global Liveability Index 2022.

4. See Victoria's Innovation Statement.





Driving sector recovery and resilience

Victoria's international education sector has been significantly impacted by the pandemic.

The closure of Australia's national borders meant international students could no longer travel to Victoria for an on-campus experience. While many students continued with their studies online, others chose not to. This sparked a sharp decline in the number of international students studying with Victoria across all education sectors and countries spanning the globe.

The pandemic has demonstrated how critical international students are to Victoria's cities and regions. Students bring vibrancy and diversity to places, and support more inclusive communities. Melbourne is not Melbourne without its international students.

As we emerge from the pandemic, many challenges remain. Victoria faces fierce competition from global education destinations such as the United Kingdom, the United States and Canada. The sector's pace of recovery is anticipated to be slow, as multiple missed student intakes require years to flow through the system.

But disruption also brings opportunity. The expansion of borderless digital education has been accelerated in response to COVID-19. Transnational education models have risen in prominence, while student expectations for flexibility and choice have increased. This has brought new opportunities for innovation and best practice in teaching and learning, and how the sector supports the international student experience.

Recovery does not mean replicating the past. *Victoria's International Education Recovery Plan 2025*, developed in consultation with the sector, outlines how the government will support the industry's resilience and growth over the medium-term. The plan builds on the *International Education Short-Term Recovery Plan 2020-21*, as well as significant investment in Victoria's international education sector during the pandemic.





Study Melbourne

Study Melbourne is a Victorian Government initiative that supports international students in their study journey with Melbourne and Victoria.

Find out more at
www.studymelbourne.vic.gov.au

International Education Short-Term Recovery Plan 2020-21

The Victorian Government is proud to have provided the largest support package of any Australian state or territory for students during the pandemic. In December 2021, the Government released the *International Education Short-Term Recovery Plan 2020-21*, outlining a set of initiatives to stabilise the sector and position it for recovery. Backed by an investment of \$33.4 million, the Government's timely support package bolstered student welfare support, empowered student leaders and expanded Study Melbourne's Global Education Network.

This investment was in addition to the \$45 million International Student Emergency Relief Fund, which provided financial support to international students who experienced financial hardship due to income loss during the COVID-19 pandemic.

International Education Resilience Fund

In response to prolonged disruptions from COVID-19, the Victorian Government invested \$50 million in the International Education Resilience Fund for Victorian universities. The fund supports enhanced international student welfare and support services, improved hybrid teaching and learning, and increased student engagement programs and events.

The fund complements the \$350 million Victorian Higher Education State Investment Fund launched in May 2020, supporting universities with major capital works, research infrastructure and applied research.

**Support for
the sector and
students during
the pandemic**



STUDY MELBOURNE HUBS

3 new

physical hubs in China, Vietnam and Malaysia, with hybrid and pop-up hubs across South Asia and Latin America

GLOBAL EDUCATION NETWORK

3 new

education representatives in Kenya, Vietnam and Brazil

>\$17m

in commercial international partnerships facilitated in 2021-22 and **over \$15m** in 2020-21



SCHOOL SUPPORT FUNDING

\$3m

in funding support to offset school-sector COVID-19 impacts and provide a suite of student experience and mental health programs for onshore and offshore students

INTERNATIONAL STUDENT EMERGENCY SUPPORT

\$2.5m

in food relief for students. **More than 10,000** students supported through the Study Melbourne Hub Victoria from March 2020 to 2022

INTERNATIONAL STUDENT EMERGENCY RELIEF FUND

>33,000

international students experiencing financial hardship provided grants of up to \$1,100

EXTREME HARDSHIP SUPPORT PROGRAM

>26,100

student and temporary graduate visa holders supported with emergency financial assistance

SUPPORTING THE RETURN OF INTERNATIONAL STUDENTS TO VICTORIA

1st state

to officially facilitate student arrivals in 2021



STUDY MELBOURNE INCLUSION PROGRAM

>7,400

students supported in 2021-22

STUDY MELBOURNE EMPOWERED SERIES

>9,000

students supported in 2021-22

FOODBANK INTERNATIONAL STUDENT POP-UP STORE

>66,000

students supported from over **130 countries** and more than **290 education providers**

STUDY MELBOURNE COUNTRY TO COAST

500

student experiences delivered

TAFE MICRO-CREDENTIALS

30

under development



PATHWAY TO VICTORIA SCHOLARSHIPS

18 TAFE

and university partners

>3,000

scholarships funded, reaching students from **over 50 countries**

8 EDTECH VIRTUAL TRADE MISSIONS AND EXPOS

8,800

attendees and **85 organisations** at EduTECH Congress and Expo 2021

4,300

attendees from **60 countries** at Melbourne EdTech Summit 2021



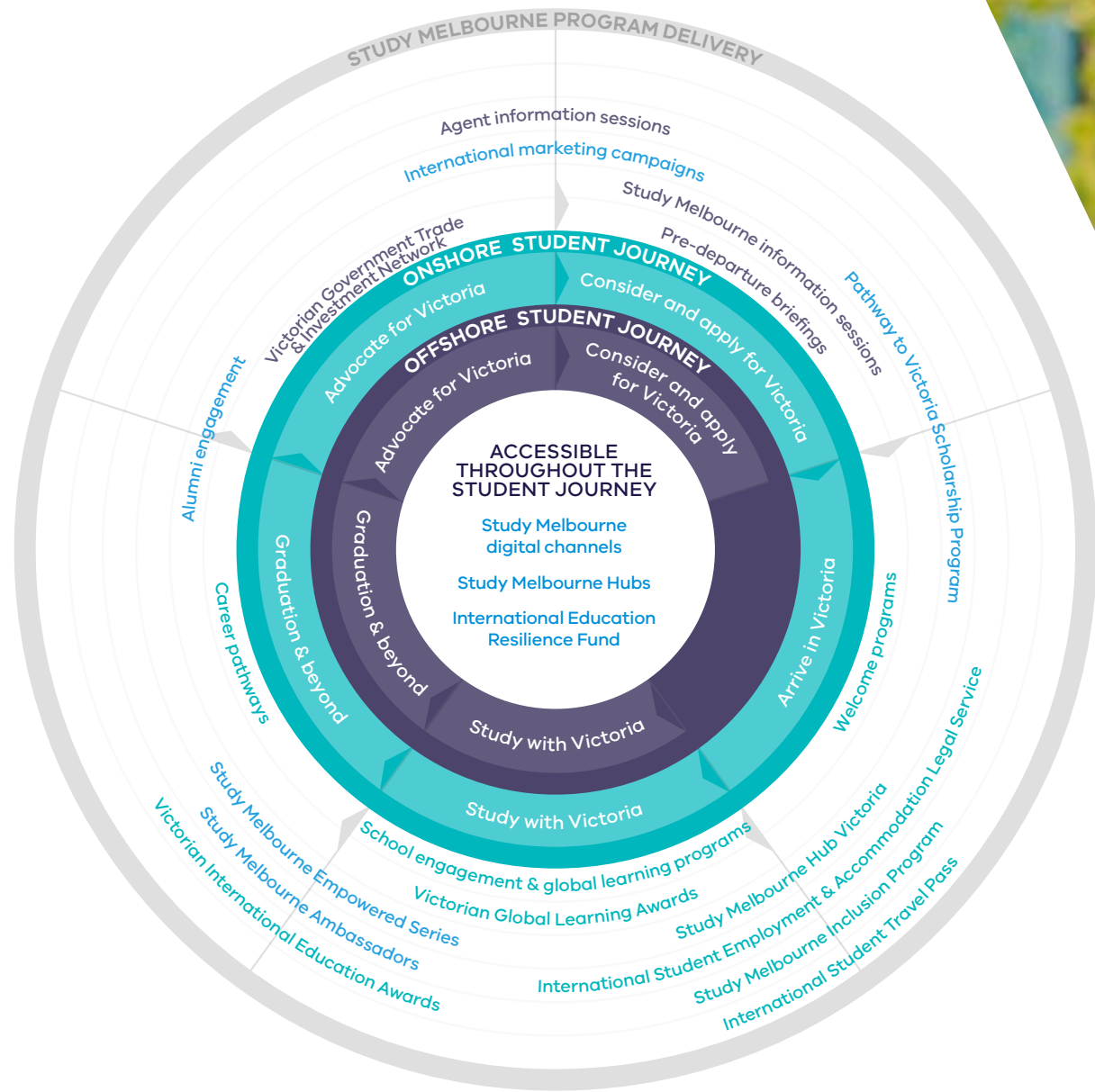
INTERNATIONAL BRAND CAMPAIGN

170m

impressions and **over 935,000 clicks**

Study Melbourne support throughout the student journey

The international student journey does not end at graduation. Positive post-study outcomes are critical to the student experience and increase the propensity of alumni to recommend Victoria to students, alumni and diaspora communities over the coming decades. With programs and support available throughout the student journey, Study Melbourne is committed to setting up international graduates for future success.



Offshore | Hybrid | Onshore



Victoria's high-quality student accommodation offering

Victoria offers a range of safe and high-quality accommodation options for international students. This includes university managed accommodation, residential colleges, purpose-built student accommodation, and commercially managed student housing. Younger international students are well supported by homestay households who are sourced and monitored by Victoria's schools, providing the safety and security of family.

The student accommodation sector is continuously evolving to meet the needs and expectations of students. This is being achieved through enhanced standards, competitive rent and support for student wellbeing, social integration and educational achievement.

An integrated education and industry ecosystem

Victoria's education ecosystem is underpinned by sustained government investment, robust quality assurance frameworks and regulation, and education institutes with strong links to local industry. As demonstrated through the Victorian Skills Plan⁵, addressing the training and workforce needs of local communities and industries is a central priority for the Victorian Government.

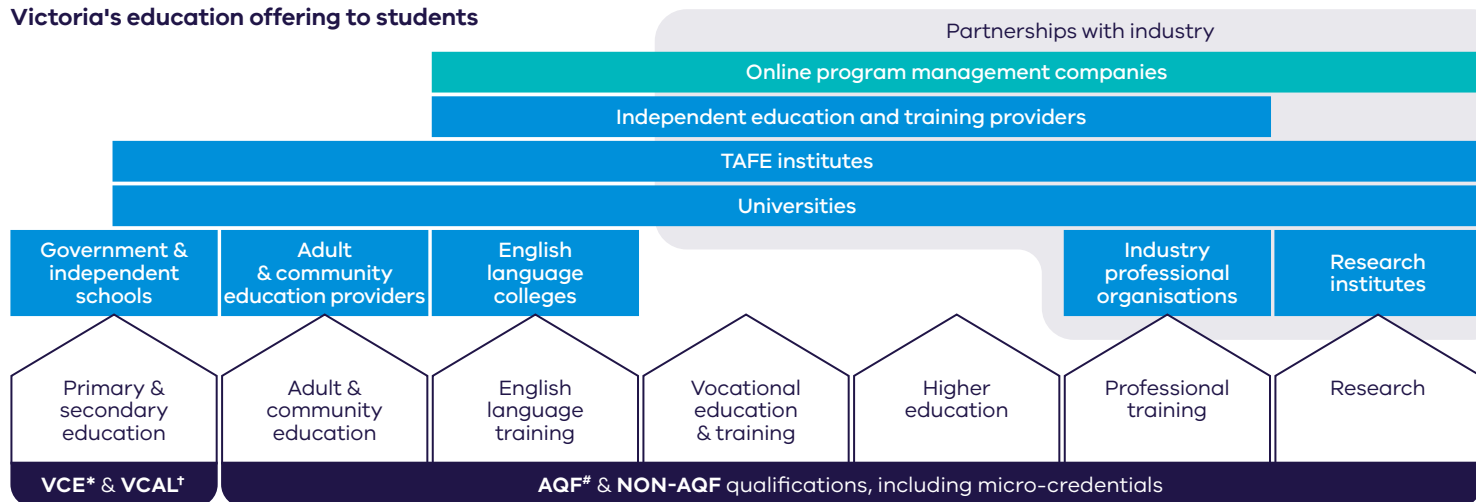
5. See Victorian Skills Plan.

Victoria's universities, dual-sector institutions, TAFEs and independent education and training providers offer qualifications spanning higher education, research, VET, English language and professional training. Across the education ecosystem, digital delivery and learning is enabled through Victoria-based online program management companies (OPMs). Victoria's schools offer an important entry point to studying in Victoria with a world-recognised curriculum, preparing students for tertiary education and an increasingly complex and interconnected world and workplace.

Through this integrated system, Victoria offers a breadth of flexible choices and pathways for learners. This starts in schools with the Victorian Certificate of Education (VCE), and ranges from formal qualifications within the Australian Qualifications Framework (AQF) to outcome-based micro-credentials that respond to fast-changing industry needs. This gives students the confidence to move between and across sectors, to upskill and reskill throughout all stages of life.



Victoria's education offering to students



KEY

- Education qualifications
- Education providers
- Partnerships with industry
- Education sectors
- Online delivery providers

* Victorian Certificate of Education
 † Victorian Certificate of Applied Learning
 # Australian Qualifications Framework



Case study: Gippsland Hi-Tech Precinct

The Gippsland Hi-Tech Precinct is a regional hub that is helping to invigorate the economy of Gippsland, which covers the eastern part of Victoria. It is part of the state's plan to offer world-class education, training and research with strong industry linkages, and to drive innovation and employment pathways across the state.

Located 90 minutes from Melbourne, the Gippsland Hi-Tech Precinct is the product of collaboration between Federation University Australia, TAFE Gippsland, the Gippsland Tech School, industry, local government and the Victorian Government. With the Morwell Innovation Centre at its heart, the precinct hosts research, business incubation, new product development, start-up support, education and training at one location. It also brings together and invigorates three of Gippsland's key growth sectors – health, food and fibre and new energy.

Since its establishment, the precinct has supported hundreds of jobs by accelerating technology adoption and attracting new investment into the region. It has also served as a much-needed hub for centralising and connecting research and innovation. The precinct has been a leader in education-industry linkage, showcased by the Gippsland Tech School's focus on providing real world learning experiences through specialised STEM programs. TAFE and university students across the region have benefited from having access to a broad range of opportunities and better pathways to higher education, research and careers in relevant industries.

Vision

Victoria is a global leader in education, recognised for quality, innovation and inclusion

Goals

→ A leader in student experience and graduate outcomes

Victoria continues to deliver innovation in program delivery, offering transformative experiences that are responsive to student aspirations, preferences and needs. Study Melbourne student programs and services support increased diversity, inclusion, equitable access and student empowerment, providing graduates with the skills needed to succeed in their chosen careers.

→ Diversified and strengthened global markets

Victoria's strong global education offering and connections drive sector growth through student mobility, international partnerships, new education products and delivery models. The sector's exposure to volatility is mitigated through support for improved access to emerging and growth markets, while consolidating the State's linkages with its longstanding markets and partners.

→ A global reputation for education excellence

Victoria's reputation as a high-quality education, training and research destination is elevated globally, with Melbourne established as an Asia-Pacific hub for EdTech, digital learning and education innovation. Education excellence extends beyond the classroom, exemplified through outstanding student experiences and graduate outcomes.



Realising this vision through collective investment

To remain globally competitive and drive the recovery of Victoria's international education sector, a collective effort and investment is required across multiple tiers of government, education providers and industry.

All stakeholders must play a role in realising these critical success factors:

→ **Remaining a globally connected economy and society**

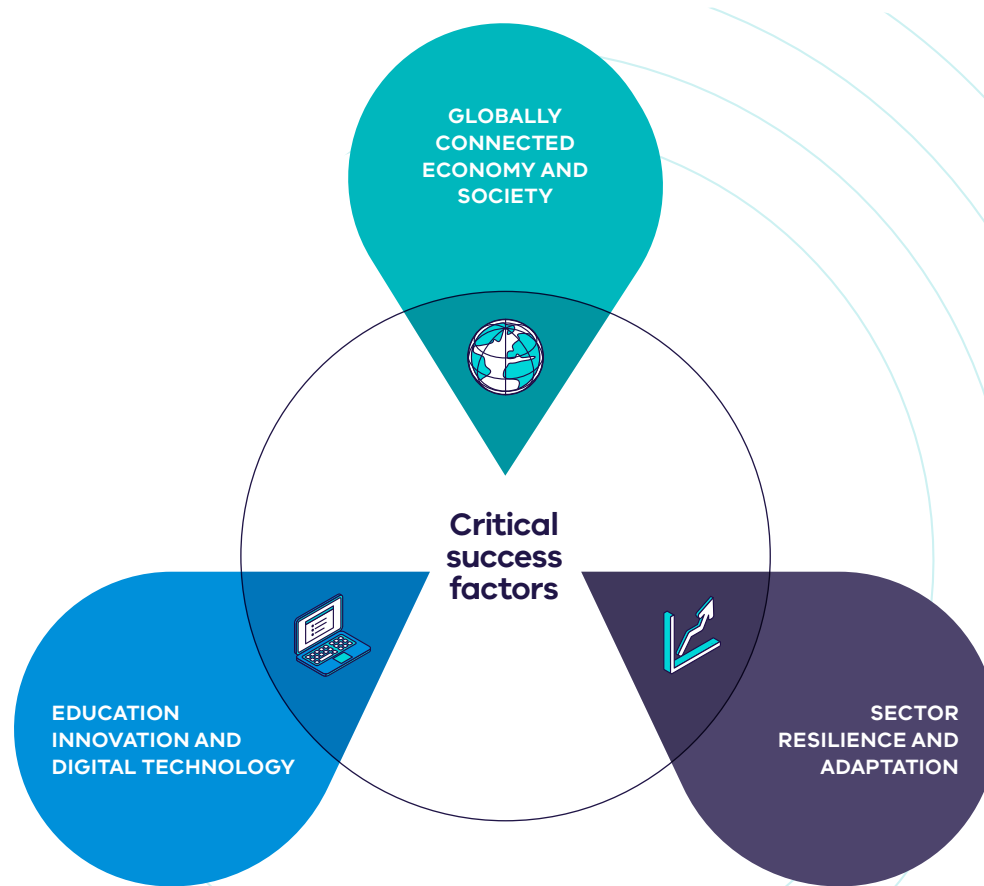
Victoria is an open, welcoming and globally connected economy and society that recognises the value of global education relationships, international business connectivity and people-to-people links.

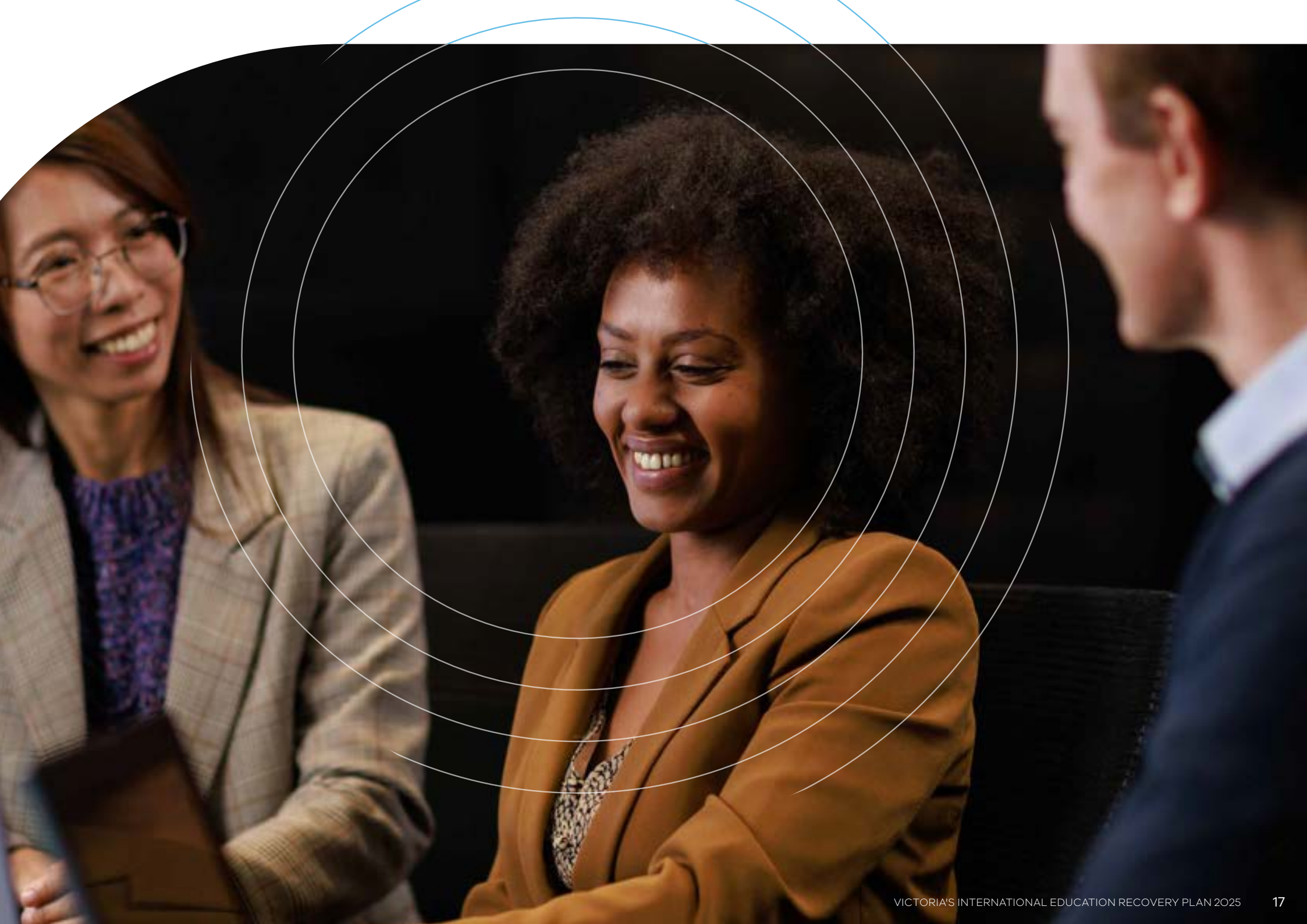
→ **Embracing education innovation and digital technology**

Victoria invests in and embraces innovation and digital technology, increasing our global competitiveness by responding to shifting student preferences and demand for flexibility, with digital connectivity enabling greater inclusion by expanding the reach of education offerings.

→ **Driving sector resilience to adapt to a dynamic international market**

Improved business resilience sees the sector emerge from the pandemic well-positioned to respond to market barriers and future volatility, including global market shocks or downturns, the pace of digital disruption, barriers to student mobility and impacts of climate change.





Pillar one

The student experience

Empower students to have a positive experience with Victoria through inclusive and responsive student wellbeing support, engagement programs and sector capacity building

Victoria is committed to providing all students with equitable access and services that are approachable, welcoming, safe and inclusive. We are proud of Victoria's diverse and multicultural international student communities, both onshore and offshore, and across Melbourne and regional Victoria.

Through well-established community partnerships and a cross-sectoral approach, Study Melbourne programs and services work to ensure Victoria is where all international students can be proud and live their life to the fullest. This includes women, the diverse LGBTIQ+ (lesbian, gay, bisexual, trans and gender diverse, intersex and queer) communities, people of colour and all faiths, people with disability, and those from a broad spectrum of socio-economic backgrounds.⁶

6. See Our Promise, Your Future: Victoria's Youth Strategy 2022-27, Pride in our future: Victoria's LGBTIQ+ strategy 2022-32, Safe and Strong: A Victorian Gender Equality Strategy, and Inclusive Victoria: State Disability Plan (2022-2026).

Study Melbourne recognises the distinct contribution that female international students make, with female international enrolments increasing by 29 per cent in the five years to 2020 – above the national average and outpacing male international enrolments by five percentage points.⁷ Through continued investment in leading initiatives such as the annual Future Female conference, Victoria is committed to empowering female international students as leaders and decision-makers.

The Victorian Government is committed to helping students thrive by making Melbourne and cities in regional Victoria more accessible and student-friendly through improved safety, liveability, and affordability. This includes support for the development of visitor economy experiences and showcasing what the state has to offer.⁸

7. Commonwealth Department of Education (DoE), Higher Education Statistics Collection.
8. See Victoria's Visitor Economy Recovery and Reform Plan.

"Study Melbourne has helped my student life since I arrived through fostering connections with other international students. Now I feel at home in Victoria. I believe it is the multicultural community, the well-connected transport and access to events that made my student life so meaningful. Everything is here, I just had to reach out and the world opened. Every day I'm falling more and more in love with Melbourne."

Seng Doi
Victorian international student

→ **AIM 1**

Ensure all students enjoy studying and living in Victoria, and feel a strong sense of belonging and connectedness to the local community.

→ **AIM 2**

Build the capacity and capability of Victoria's education ecosystem to offer inclusive and culturally appropriate services.

→ **AIM 3**

Support greater engagement with students studying with regional providers and remotely, with equal access to wellbeing services and empowerment programs.

🕒 **ACTION 1: STUDY MELBOURNE HUB VICTORIA**

Relaunch the Study Melbourne Student Centre as the Study Melbourne Hub Victoria, providing accessible, inclusive and timely information, case work support and referral services face-to-face and online, along with programs and events for international students in Victoria.

🕒 **ACTION 2: INTERNATIONAL STUDENT EMPLOYMENT AND ACCOMMODATION LEGAL SERVICE**

Continue to offer free and confidential legal advice, casework and representation to international students on employment and accommodation matters through the Study Melbourne Hub Victoria.

🕒 **ACTION 3: STUDY MELBOURNE INCLUSION PROGRAM**

Fund industry and student led projects that enhance the experience of international students and support sector capacity building in Melbourne and regional Victoria.

🕒 **ACTION 4: INTERNATIONAL STUDENT TRAVEL PASS**

Improve affordability and access to public transport by offering discounts on 3, 6 and 12 month passes for eligible international students in Melbourne and regional Victoria.



Pillar two

Employability and student return on investment

Launch global careers by attracting and nurturing talent, enhancing student employability, entrepreneurship and leadership, and building long-lasting global linkages

Student feedback shows that personal and professional aspirations are as important to students as academic success. That's why the Victorian Government invests in student empowerment and leadership development beyond the classroom. Along with the employment opportunities open to students through high-quality and industry-focused education and training – Victoria is a launchpad for global careers.

Victoria prides itself on the career possibilities available to its graduates, recognising the capability, knowledge and global perspective they bring. Through Australia's post-study work rights and visa pathways, high-calibre international graduates have the option to stay and contribute to Victoria's thriving and globally connected business and innovation ecosystem or pursue a career in their destination of choice.

The Study Melbourne Empowered Series offers a suite of employability programs – co-designed by students, for students – which are now accessible in Victoria or overseas (physically and virtually) through the offshore Study Melbourne Hubs.

Our global alumni community deepens Victoria's ties with the world, creating enduring people-to-people, knowledge and business linkages. The Victorian Government Trade and Investment Network is extensive, with 23 offices located in cities around the world – including Melbourne headquarters – along with a new Paris office opening in 2023. The network is committed to building global connections now and in the long-term, including working with Victoria's international alumni.

Study Melbourne Empowered Series



CAREER CATALYST

Strengthening international graduate outcomes through employability skills development, professional networking and industry partnerships.



LEADERSHIP LABS

Realising and nurturing the social enterprise and civic leadership of international students, in line with the United Nations Sustainable Development Goals.



FUTURE FOUNDERS

Recognising the entrepreneurial potential of international students, providing venture sponsorships for student start-ups and showcasing their business potential.



GLOBAL GAMECHANGERS

Supporting international student innovators and future tech leaders to develop industry-relevant tech solutions.



MENTOR MATCH

Deepening international student community connection through professional mentoring, peer-to-peer support and business partnerships.



EVERYDAY HEROES

Increasing awareness, social and community connection through a festival of events and workshops celebrating diversity.

→ **AIM 4**

Position Victoria as the top Australian jurisdiction for employability and employment outcomes for international students.

→ **AIM 5**

Attract, nurture and retain a diverse pool of global talent, contributing to Victoria's skills base and thriving economy.

→ **AIM 6**

Support alumni to stay connected with Victoria, and grow the state's business, education and research linkages with global partners across sectors and industries.

🎯 **ACTION 5: STUDY MELBOURNE EMPOWERED SERIES**

Deliver an enhanced series of strengths-based programs to support international student employability, entrepreneurship and empowerment.

🎯 **ACTION 6: STUDY MELBOURNE AMBASSADORS**

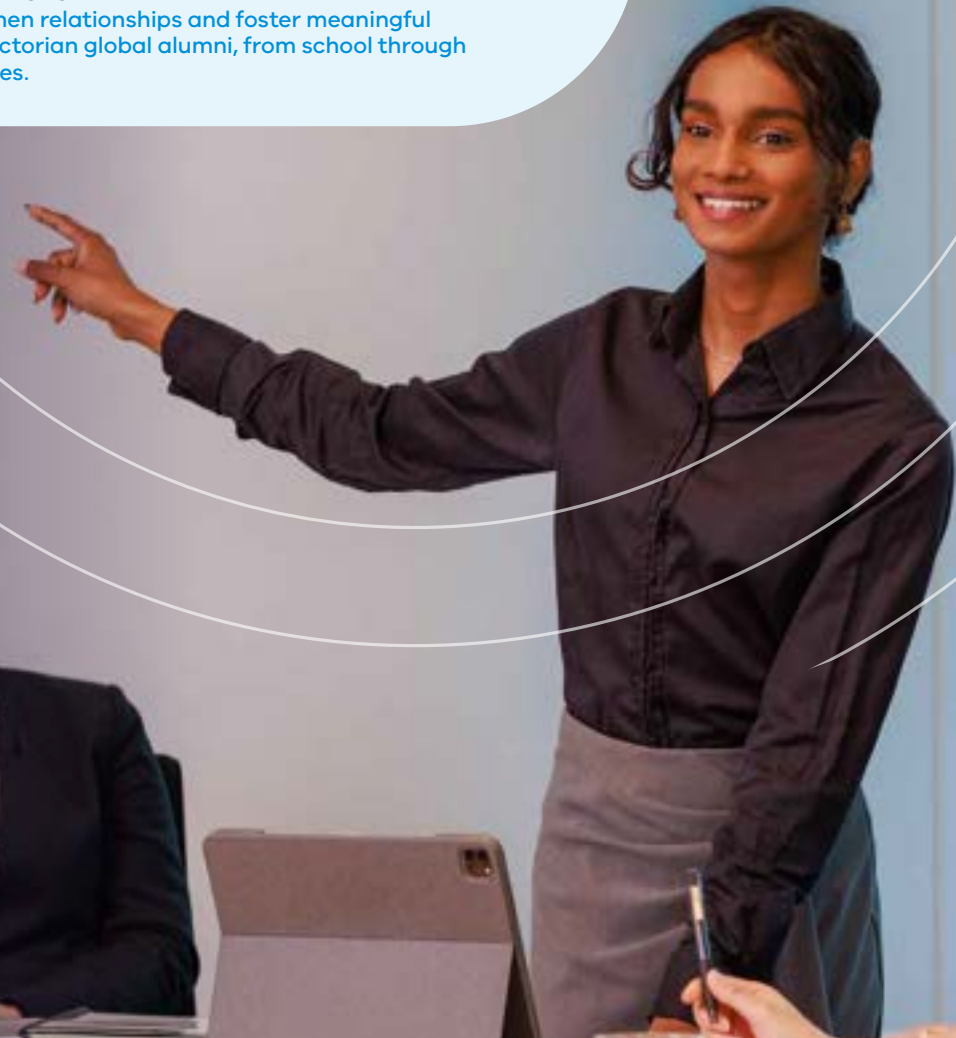
Build the leadership capability and profile of global talent through Study Melbourne Ambassadors, championing the benefits of studying with Victoria through an authentic student voice.

🎯 **ACTION 7: CAREER PATHWAYS**

Commit to working with employers, industry bodies, education providers and students to address employment barriers and promote post-study pathways for global talent, including a commitment to action to boost the number of international graduates employed in their chosen field.

🎯 **ACTION 8: ALUMNI ENGAGEMENT**

Continue to strengthen relationships and foster meaningful engagement with Victorian global alumni, from school through to research graduates.



Pillar three

Promotion of Victoria's education offering

Build Victoria's reputation as an open and inclusive education destination known globally for excellence and innovation, including stronger promotion of regional Victoria's education offering

Melbourne has consistently been ranked as Australia's best student city.⁹ Globally renowned as a vibrant cultural and creative capital with a sought-after urban lifestyle and welcoming communities, Melbourne offers a safe, inclusive and attractive place to study, live and work. With universities that rank among the world's best, including two in the top 100,¹⁰ and a strong network of government-backed schools and TAFE institutes offering industry-focused vocational education, Victoria is home to top education institutions generating a wealth of talent and ideas.

When students head to regional Victoria, they are welcomed by a supportive community environment and quality education providers with cutting-edge facilities and strong industry linkages.

9. QS Best Student Cities 2023.

10. QS World University Rankings 2023, Academic Ranking of World Universities (ARWU) 2022, Times Higher Education (THE) World University Rankings 2022.

Study Melbourne, the Victorian Government's education destination brand, plays an important role alongside government and education partners in promoting the world-class student experience offered across Melbourne and regional Victoria. Study Melbourne has the largest online international student community of any state or territory in Australia, reaching a global audience of 500,000+ users via Facebook, Instagram, Twitter, WeChat and LinkedIn. Through its digital platforms and targeted campaigns, Study Melbourne enhances Victoria's reputation as offering an international study journey that is unique, fulfilling and enduring – in an authentic student voice.

By connecting international students to the resources they need to feel confident, safe and supported, Study Melbourne helps to foster a positive student experience. The benefits are far-reaching and fundamental to positive word-of-mouth recommendations that can span generations.

"Regional Victoria offers international students an outstanding student experience. Our regional centres are accessible and well-connected by transport, with an affordable lifestyle. Among welcoming and friendly communities, students have access to high quality education, training and research opportunities. Thanks to strong employer and community linkages, students can gain meaningful industry experience to kick-start their career. Coupled with rewarding academic, social and cultural connections, students have a real competitive advantage upon graduation."

The Hon John Brumby AO

Chancellor La Trobe University and Chair of the International Education Advisory Council

→ **AIM 7**

Support Victoria's international education offering to be top of mind for prospective international students from a diverse range of cultural, social and economic backgrounds.

→ **AIM 8**

Achieve greater recognition of Victoria's regional study destinations and their unique value among international students.

→ **AIM 9**

Through positive word-of-mouth referrals, increase the propensity of students, alumni and diaspora to recommend Melbourne and regional Victoria as a preferred study destination.

🕒 **ACTION 9: STUDY MELBOURNE BRAND**

Continue to promote Melbourne and regional Victoria's education, training and research offering and the benefits of studying with Victoria through a refresh of Study Melbourne, the state's longstanding study destination brand, supported by innovative and targeted domestic and international marketing campaigns.

🕒 **ACTION 10: SHOWCASE REGIONAL VICTORIA**

Promote the strength of education and training offerings in regional Victoria, including leveraging Commonwealth Games 2026 regional hubs in Geelong, Bendigo, Ballarat and Gippsland.

🕒 **ACTION 11: CELEBRATE ACHIEVEMENT AND EXCELLENCE**

Showcase outstanding international students and education stakeholders through the **Victorian International Education Awards**, including new awards for education innovation and employers who support international graduate outcomes, and the **Victorian Global Learning Awards**, recognising school student and homestay family achievement.



Pillar four

Market access and global connections

Strengthen industry engagement with global partners and support diversification across education markets, products and delivery modes through Victoria's global education, trade and investment network

The global reach of Victoria's Global Education Network and Study Melbourne Hubs is unrivalled among Australia's states and territories. The Global Education Network is embedded within Victorian Government Trade and Investment offices led by the Commissioners for Victoria. This network seeks to maximise education, trade and investment outcomes for Victoria, including through inbound and outbound trade missions and delegations.

With education representatives located in strategic markets around the world, the Global Education Network promotes Victoria as a premium study destination, drives student recruitment efforts, and facilitates transnational education partnerships by providing Victorian stakeholders with free on-the-ground market intelligence and connections to in-country networks.

In 2021, Study Melbourne's Global Education Network expanded into Vietnam, Kenya and Brazil. From 2022-23, it will expand further into Colombia, along with new school sector representatives in Vietnam, Japan and Korea. This will continue to strengthen the global presence of Victoria's universities, TAFE institutes, private education and training providers, English language colleges, schools and EdTech companies. Spanning from delivery of the VCE offshore and promotional activities through to facilitating market access for new micro-credentials – Victoria's Global Education Network opens doors to new education, training, research and industry partnerships.

Alongside the Global Education Network, Study Melbourne Hubs bring a taste of Victoria to current, future and past students offshore. Extending the sector's global footprint, the Victorian Government has established physical Study Melbourne Hubs in China, Vietnam and Malaysia, a hybrid hub in South Asia, and a pop-up hub for key student engagement activities in Latin America. The hubs offer a dynamic space free of charge for Victorian education providers, agents, education advisors and students to connect, including access to Study Melbourne programs delivered virtually. The hubs also showcase Victoria's global leadership in digital training and education innovation, connecting EdTech companies with prospective partners.

Melbourne is the EdTech capital of Australia. Enjoying the highest concentration of the region's top EdTech companies,¹¹ Melbourne is a hot spot for supporting and scaling education innovation and thought leadership. Melbourne is positioning itself as an Asia-Pacific hub for EdTech and innovation, building partnerships to foster outstanding digitally-enabled communities, education and training to students. Through Global Victoria, the government will continue to build on significant investment to date to develop Victoria's EdTech ecosystem, including through programs and events leading the discussion on digital learning.

11. HoloniQ ANZ EdTech 50.



→ **AIM 10**

Facilitate increased market access, intelligence sharing and partnerships across Victoria's established, growth and emerging markets.

→ **AIM 11**

Realise greater sector diversification with new high-quality products, transnational education models and modes of delivery, including through EdTech and innovation.

→ **AIM 12**

Support Victoria's education offering to be truly global, transcending national borders to deliver education excellence and student experience programs regardless of where a student chooses to study.

🕒 **ACTION 12: EXPANDED GLOBAL EDUCATION NETWORK**

Continue to promote the State's education offerings and provide free on-ground support to Victorian international education stakeholders, expanding the Global Education Network to 19 in-country education representatives from 2022-23 with additional resources in Colombia, Vietnam, Japan and Korea.

🕒 **ACTION 13: OFFSHORE STUDY MELBOURNE HUBS**

Continue to deliver offshore Study Melbourne Hubs in China, Vietnam, Malaysia, South Asia (hybrid) and across Latin America (pop-up hub), providing a free space to engage Victoria's current and future international students, alumni, agents and education advisors, as well as Victorian education providers, EdTech companies, investors and other prospective partners.

🕒 **ACTION 14: EDTECH AND INNOVATION**

Continue to support activities, events and trade programs which reinforce Victoria's reputation as Australia's EdTech, digital learning and education innovation leader, including Melbourne EdTech Week.

Victoria's Global Education Network

With education representatives based in 15 global locations and Study Melbourne Hubs – physical, virtual and pop-up – across five strategic markets offshore, the Victorian Government will take a segmented approach to strengthening and diversifying market access and global connections.

The Victorian Government will invest in and support the sector by committing to **strengthen** the state's well-established markets, **build** our prospective high-growth markets, and **explore** new and emerging markets for Victoria. This market prioritisation draws on analysis of global and in-market trends, as well as in-country intelligence gathered through the Global Education Network. Market categorisation does not preclude the government and the sector from exploring opportunities in markets beyond those prioritised as they emerge. Priority markets may also shift over time in response to market trends and sector priorities.

Beyond the Global Education Network, the sector's global connections and partnerships are expansive. Europe and North America are sizeable markets, with scope to boost research collaboration and student mobility through institution-to-institution links. These regions also bring opportunities for capturing diverse market segments through EdTech partnerships and investment.

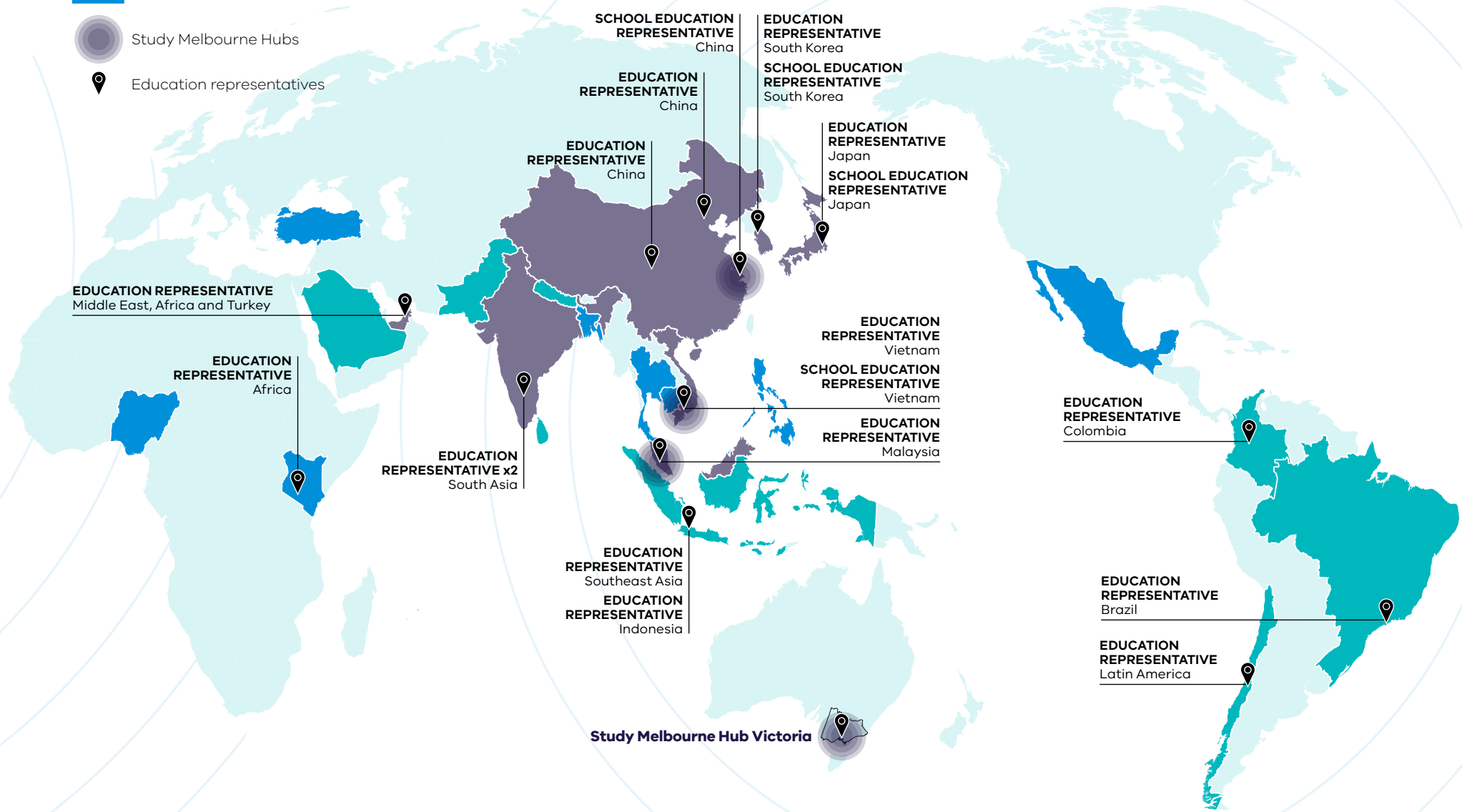
The government also welcomes new opportunities arising from bilateral and multilateral trade agreements with strategic partners, recognising the key role education and training plays in enabling mutually beneficial outcomes.



Victoria's Global Education Network map

- Strengthen
- Build
- Explore

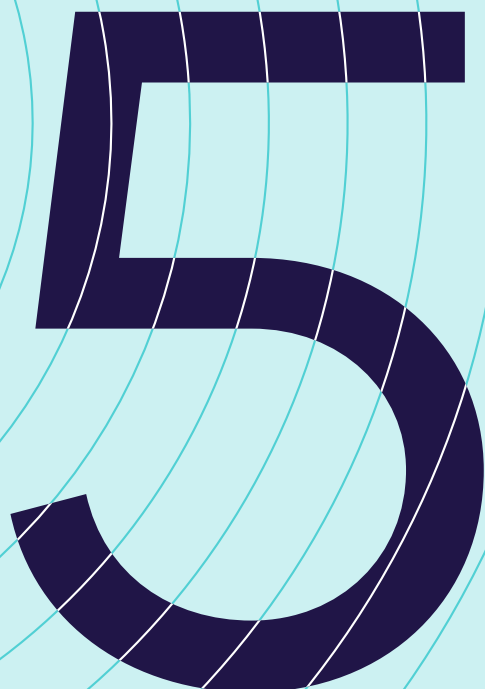
- Study Melbourne Hubs
- Education representatives



Pillar five

Partnerships and collaboration for a strong sector

Position the international education sector to respond to emerging opportunities and risks through strong government partnerships, engagement and aligned advocacy



Study Melbourne's stakeholders are central to the work we do and the sector's collective success. Whether connecting with individual students or facilitating research commercialisation outcomes with global consortia – Study Melbourne strives for genuine, purposeful and reciprocal engagement that delivers value to the international education sector in Victoria.

The pandemic has seen the Victorian Government's engagement with the international education sector grow stronger than ever. As the sector recovers, continuing to build and consolidate these relationships remains a key priority.

An enabler of current and future priority industries, Victoria's education and training sector has a fundamental role to play in the state's economic recovery. The sector's impact is far reaching. It drives cutting-edge research and development, attracts global talent and international investment, supports place-based and precinct development, boosts tourism through visiting friends and relatives, and helps to meet future skills needs across Melbourne and regional Victoria.¹²

If the international education sector is to rebound strongly, it is essential that the right national policy settings are in place. The Commonwealth Government has a central role to play ensuring the preconditions for a successful sector are realised – through migration and border settings, education and skills policy, Australian bilateral relations, and the Study Australia national brand as a welcoming education destination. In recognition of this, pursuing effective and constructive engagement and advocacy will remain a core focus for the Victorian Government in years to come.



¹². See Victorian Skills Plan.

→ **AIM 13**

Continue to drive collaboration with and between stakeholders representing all parts of the education ecosystem – including students, education providers, industry bodies, community organisations, employers and local, state and Commonwealth Government agencies.

→ **AIM 14**

Continue to identify and implement strategic responses to trends, risks and opportunities facing the international education sector, including addressing global challenges such as climate change.¹³

→ **AIM 15**

Effectively advocate to the Commonwealth Government on critical issues impacting Victoria's international education sector to ensure optimal national policy and operational settings for a competitive sector.

🕒 **ACTION 15: INDUSTRY ENGAGEMENT**

Facilitate engagement with industry across various fora, including continuation of the International Education Advisory Council to advise Government on sector recovery.

🕒 **ACTION 16: STUDENT ENGAGEMENT**

Ensure student perspectives – from across schools, ELICOS, VET, higher education and research – inform policy, program and service design and delivery.

🕒 **ACTION 17: STUDENT EXPERIENCE NETWORK**

Continue to convene regular fora with sector stakeholders and students to address critical issues such as student health and safety, leadership and employability, and highlight Victoria's significant investment in international student programs and services.

🕒 **ACTION 18: COLLABORATION WITH THE CITY OF MELBOURNE**

Continue to work with the City of Melbourne on cultural and social initiatives dedicated to enriching the experience of international students.

🕒 **ACTION 19: COMMONWEALTH ADVOCACY**

Continue to advocate to the Commonwealth Government on key issues impacting Victoria's international education sector to ensure the best possible settings for success, including industry support, promotion and positioning, and student and temporary graduate visa settings.

13. See Victoria's Climate Change Strategy.



Measures of success

The Victorian Government will track international education sector recovery and its progress delivering on this plan through a range of measures.

These include:

- Maintain a high annual proportion of international students who are satisfied with Study Melbourne programs delivered in Victoria and internationally
- Annual growth in proportion of Victorian international students who are satisfied with living in Australia
- Annual growth in proportion of Victorian international students employed after graduation
- Annual growth in number of international student commencements from Victoria's established, growth and emerging markets
- Annual growth in Victoria's proportion of international student enrolments with Australian providers
- Annual growth in annual export outcomes facilitated by the Victorian Government's Global Education Network





Find out more

www.studymelbourne.vic.gov.au

www.study.vic.gov.au



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