



International Education and Training Strategy to Advance Queensland 2016-2026



Queensland
AUSTRALIA
endless opportunities

TIO Trade & Investment
Queensland
AUSTRALIA





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Foreword

International education and training (IET) is our second biggest service export and is vital to the future prosperity of Queensland. In 2015, IET in Queensland contributed \$2.8 billion in export revenue and supported 19,000 jobs. The Queensland Government is committed to growing our IET sector, informed by the voice of the industry. It is your strategy, your ideas, and your world class education and training delivery that will grow our shared future.

In 2015, Queensland hosted more than 100,000 students coming from over 160 countries. These students were based across our state, from the Gold Coast to Cairns, Toowoomba to Townsville, Brisbane to Bundaberg and the Sunshine Coast to Rockhampton.

But we know that we can boost these numbers for the benefit of all Queenslanders. Currently, Queensland accounts for 16% of Australia's international student numbers. Our modelling shows that increasing this share by just 4% will lift potential export revenue to \$7.5 billion and deliver an additional 6,800 jobs across the state.

In June 2016 the Queensland Government launched the draft *International Education and Training Strategy to Advance Queensland 2016-2026* as a tool to drive this growth. In ten forums across Queensland 270 stakeholders engaged with us and workshopped the final strategy. We listened to the needs of each sector and each region to create this document – the *International Education and Training Strategy to Advance Queensland 2016-2026*.

This strategy focuses on four strategic imperatives: Promoting Queensland Internationally; Enhancing the Student Experience; Strengthening our Regions; and Connecting the Industry. To achieve continued collaboration with industry, these imperatives are supported by three enabling initiatives: IET Partnership Fund; IET Partnership Plan; and the IET Summit.

Combined, this represents the most comprehensive suite of support for the sector in Queensland's history. And the time is right. Our opportunity to leverage from the Queensland Governments *Advancing Tourism 2016-20: Growing Queensland Jobs, Advance Queensland, Advancing education: An action plan for education in Queensland* and various infrastructure projects has further embedded the collaborative approach to IET in Queensland.

As one of Queensland's most valuable industries, IET is a vital investment for our future. A robust IET industry drives innovation, builds a stronger economy, creates global business networks and creates more jobs across Queensland. It enhances Queensland's global standing, enriches our community and connects our students with lifelong friendships all across the world.

We are determined to fully realise for Queensland the global opportunities presented by IET, not just now, but into the future. We are looking forward to working with education and training providers, industry, government and the community to deliver our shared vision for a thriving IET sector here in Queensland.



The Honourable
Curtis Pitt MP
Treasurer
Minister for Trade and Investment



The Honourable
Kate Jones MP
Minister for Education and
Minister for Tourism and
Major Events and the
Commonwealth Games



The Honourable
Yvette D'Ath MP
Attorney-General and Minister
for Justice and Minister for
Training and Skills

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Strategy at a Glance

International Education and Training Strategy to Advance Queensland 2016-2026



VISION

A strong and sustainable international education and training (IET) industry that facilitates global engagement, produces lifelong ambassadors for Queensland, and becomes a key catalyst for growing Queensland's knowledge economy.



GOAL

Harness Queensland's comparative advantages to reposition Queensland as a leading destination for international education and training in the Asia-Pacific region – aspiring to contribute to Australia's overall standing and 20 per cent of the national market share by 2026.

STRATEGIC IMPERATIVES

ENABLING INITIATIVES

To ensure Queensland Government investment is targeted, leverages partnerships and is closely monitored for impact

INITIATIVES

- 1 IET Partnership Fund
- 2 IET Partnership Plan
- 3 IET Summit



PROMOTING QUEENSLAND INTERNATIONALLY

Attract the best and brightest students from the most diverse range of markets across all sectors both onshore and offshore.

- 4 Showcasing Queensland to the world
- 5 Communicating with the world
- 6 Major events sponsorship, participation and attraction
- 7 Bringing the world to Queensland
- 8 Ministerial education, training and research missions
- 9 Taking Queensland students to the world
- 10 Maximising global partnerships and delivery options
- 11 Facilitating business for Queensland
- 12 Queensland as a high-quality research destination
- 13 Embracing disruption to support growth



ENHANCING THE STUDENT EXPERIENCE

Improve student satisfaction with the quality of their experience both inside and outside of the classroom.

- 14 Improving pre-departure awareness
- 15 Affordable and quality accommodation
- 16 Transport connectivity and accessibility
- 17 Enhancing employability
- 18 State-wide student hubs
- 19 Alumni engagement
- 20 Harnessing the student voice
- 21 Monitor quality issues
- 22 Student Innovation Challenge



STRENGTHENING OUR REGIONS

Increase the contribution of international education and training to regional economies and ensure that Queensland offers the most diverse, comprehensive and unique offerings to international students.

- 23 Regional international education clusters
- 24 Local Government partnerships
- 25 IET and tourism collaboration
- 26 Regional best practice network
- 27 Supporting an internationalised schools sector across Queensland



CONNECTING THE INDUSTRY

Improve leadership, coordination and advocacy and develop a Queensland perspective on industry issues and opportunities.

- 28 Ministerial Champion
- 29 International Education And Training Advisory Group
- 30 International Education and Training Unit
- 31 Queensland IET Excellence Awards
- 32 Connecting with the national agenda
- 33 Engage on sectoral issues
- 34 Community engagement
- 35 Sector capacity building and leadership development
- 36 Improving data and research





Queensland's Opportunity

A strong international education and training industry drives innovation, builds a stronger economy and creates more jobs. These are some of the immediate and most obvious economic benefits provided by the industry, but the value of international education goes far beyond this. International education and training (IET) enhances Queensland's global standing, enriches communities, facilitates international diplomacy, creates global business networks and enhances Queensland's research standing. Queenslanders also benefit from a global outlook and improved understanding of cultures through engagement with international students.

The industry encompasses research, higher education, vocational education and training (VET), schools and English Language Intensive Courses for Overseas Students (ELICOS). During their educational experience international students may study in more than one sector. Clear pathways for students are critical so that transitions between Queensland providers are seamless.

International education and training is one of Queensland's most valuable industries. In dollar terms, in 2015, research from Australian Bureau of Statistics reported that IET contributed \$2.8 billion¹ in export revenue to the Queensland economy. Deloitte Access Economics (DAE)

estimated 19,470² (full time equivalent) jobs are generated from the IET sector with one third of these in Queensland's regions.

The contribution of IET to the Queensland economy takes a variety of forms and materialises across an array of sectors. Students contribute via their expenditure on tuition fees and study materials as well as their expenditure on accommodation, transport and their broader living costs. IET also spurs economic activity via the flow-on tourism it stimulates. This includes, most directly, expenditure by friends and relatives who travel to Queensland to visit an international student (estimated at \$11 million in 2015).

¹ Australian Bureau of Statistics' 2015 publication International Trade in Services.

² The opportunity and imperative for Queensland's international education and training sector, Deloitte Access Economics, May 2016. Image courtesy of Bond University

In addition, tourism research has shown that Queensland is a favoured destination with many international students in other Australian states visiting with friends and relatives during their studies.

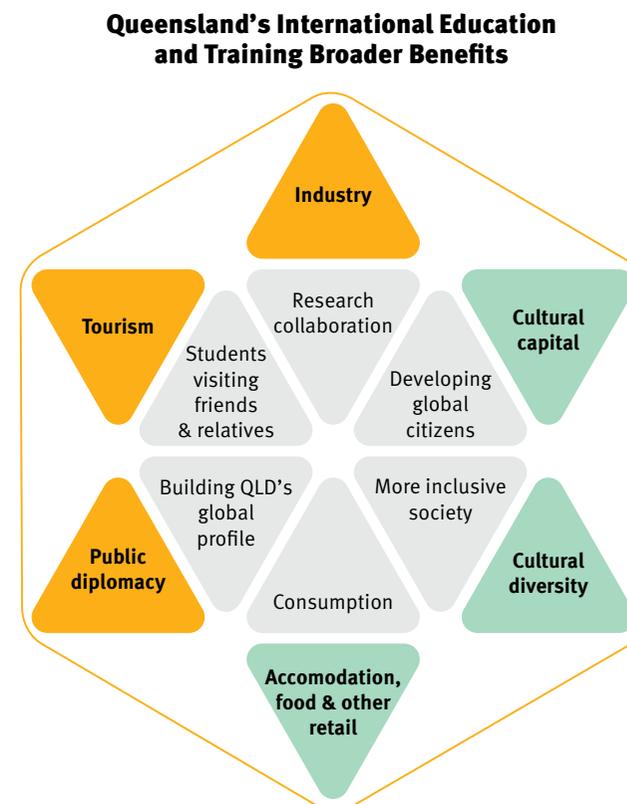
Queensland institutions also generate revenue and improve our global standing through offshore programs. In 2014 more than 10,000¹ students were enrolled with a Queensland Higher Education and/or Vocational Education and Training (VET) institution with an estimated \$56.6 million generated through this engagement.

There is significant opportunity for Queensland's education and training expertise to be shared across the globe, through offshore partnerships and programs. To ensure we diversify our offerings and maximise returns for Queensland,

¹ International student data December 2015, Australian Education International.

we will continue to use our expertise in delivering solutions for global clients. This includes mobilising the sector to respond to aid and development projects, transnational partnerships, research alliances and technology-based solutions. Emerging sectors such as EdTech and edu-tourism offer further opportunities that are yet to be fully explored.

Queensland has a highly diversified inbound international student profile. Queensland draws students from over 150 countries and has a high proportion of students from China, India, Brazil, South Korea and Taiwan. In order to remain competitive and respond to emerging opportunities, Queensland must work hard with providers to seek a balanced mix of mature and emerging source countries.



UNDERPINNING STRENGTHS

<p>World class education and training providers delivering quality teaching across a diverse range of subjects.</p>	<p>Higher education and research bodies performing well in global rankings, with particular areas of expertise in aviation and defence, agriculture technology, mining, engineering, tropical science and tropical health.</p>	<p>An advanced economy with world-class infrastructure attracting global players ranging from aviation and defence, food and agriculture, information and communication technology, financial services, tourism and mining.</p>	<p>A demonstrated Government commitment to innovation and knowledge industries led by the Advance Queensland program.</p>	<p>Unique regional diversity with half the population and one-third of international students living outside the capital.</p>	<p>Excellent accessibility and direct international airport links to major regional centres. A diverse mix of international and Australian students.</p>	<p>A safe and relaxed lifestyle in a clean, green and warm environment.</p>	<p>Queensland boasts unrivalled natural attractions including the Great Barrier Reef, Queensland's famous beaches and many of Australia's World Heritage-listed sites.</p>	<p>A well-established multicultural community, with a wide variety of ethnic and faith organisations contributing to cuisines, sport and social life.</p>
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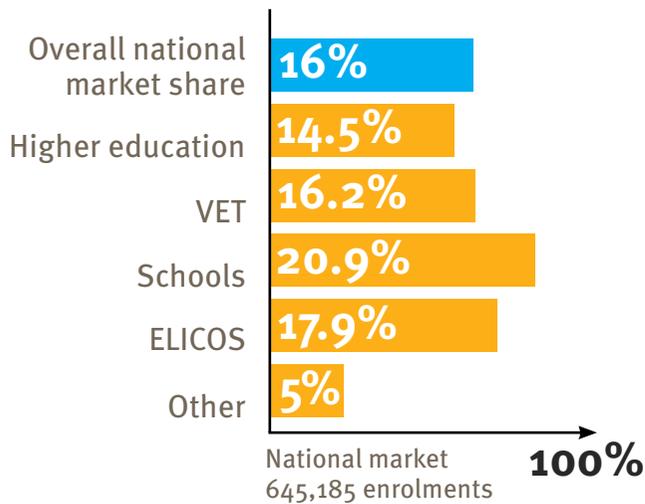
Growth Prospects

IET has been identified as one of the fastest-growing industries in the global economy and Australia is expected to be a major beneficiary of that growth. Growth of the middle class of key markets is likely to increase demand for a ‘global’ education, with a projected global shortage of 85 million medium-skilled and highly-skilled workers by 2020.

As a result, 1.1 billion learners are expected to be participating in education by 2026 just from Australia’s key source markets. DAE estimates that if Australia reaches just 1 per cent of these global learners, and Queensland maintains its current share, Queensland, could reach over 675,000 learners by 2026. Online learning and EdTech will take on an increasing role to deliver on this opportunity.

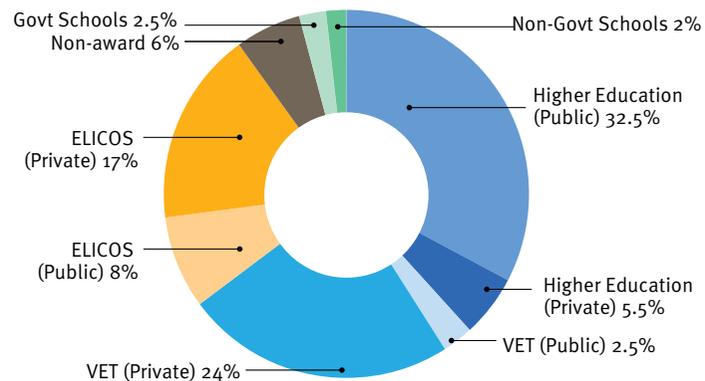
Under ‘business as usual’ assumptions, onshore international student visa enrolments in Queensland have the potential to increase from 103,251 in 2015 to 150,600 by 2026. This translates to a 10-year compounding annual growth rate of 2.9 per cent, or a cumulative increase of 33 per cent over 10 years to 2026.

Queensland’s proportion of national market share by sector 2015



Source: The opportunity and imperative for Queensland’s international education and training sector, Deloitte Access Economics, May 2016.

Proportion of total student enrolments by sector in 2015



Source: International student data December 2015, Australian Education International.

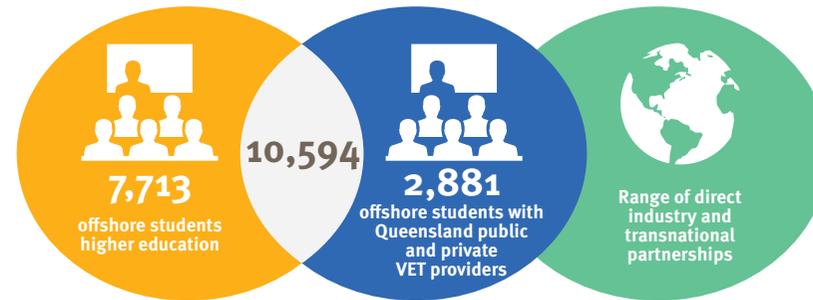


By applying the forecasted cumulative increase in onshore student visa enrolments, the export revenue is forecast to rise from just over \$2.8 billion in 2015 to \$4.6 billion in 2026 for the Queensland economy. For regional Queensland (outside of Brisbane), the ‘business as usual’ scenario projects student-related expenditure to rise from \$937 million in 2015 to \$1.5 billion in 2026.

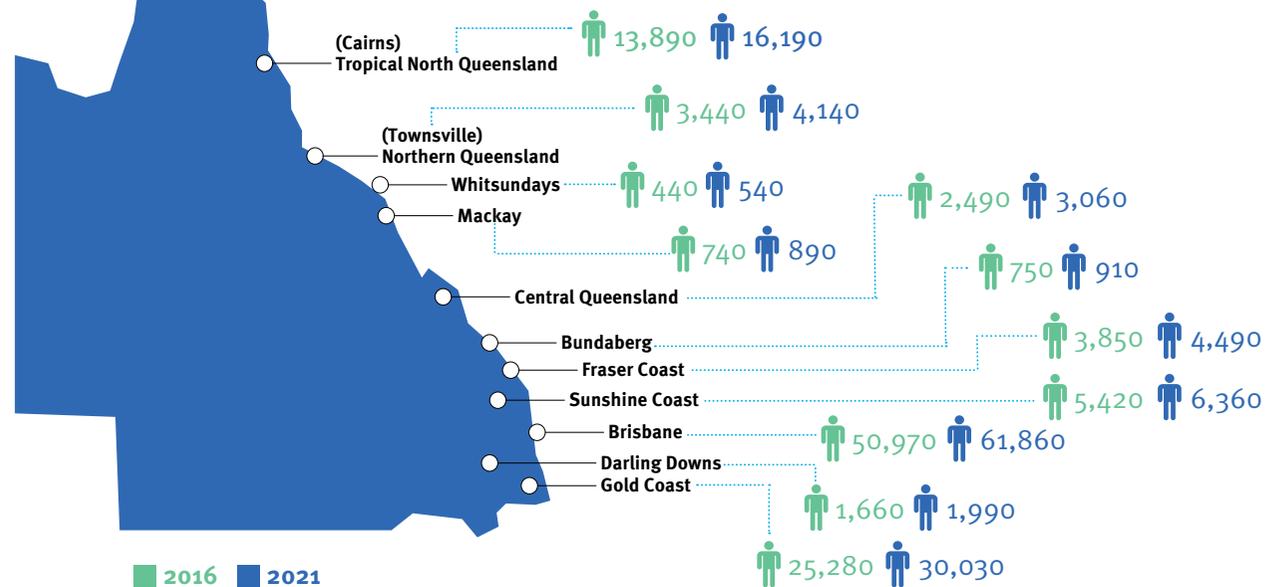
There is also capacity for these figures to be boosted by diversity in the student profile. A move from generic courses to science, engineering and medicine and a focus on post-graduate courses would increase the sector’s diversity, sustainability and yield. Attracting and retaining students from primary and high school programs into undergraduate and postgraduate study is also a means to improve sustainability and, as importantly, support broader community engagement and student success. Given Queensland’s desirability as a study tour market, we can also track and leverage this cohort to deliver ‘repeat business’. Exploring options for continued growth and effective operating models for transnational delivery, particularly in the VET sector, will further extend our global footprint.

Growth prospects are only possible with the right visa settings, a strong focus on quality, and commitment to delivering exceptional student experience.

Queensland’s offshore enrolments and value 2015



Projected regional share of international enrolments by region “business as usual” scenario 2016-2021



Source: *The opportunity and imperative for Queensland’s international education and training sector*, Deloitte Access Economics, June 2016.

Measuring Success

VISION

A strong and sustainable international education and training industry that facilitates global engagement, produces lifelong ambassadors for Queensland, and becomes a key catalyst for growing Queensland's knowledge economy.

GOAL

Harness Queensland's comparative advantages to reposition Queensland as a leading destination for international education and training in the Asia-Pacific region – aspiring to contribute to Australia's overall standing and 20 per cent of the national market share by 2026.

This Strategy benchmarks Queensland's performance in comparison with the national average. It sets an industry-wide aspirational national market share target of 18 per cent by 2021 and 20 per cent by 2026. Achieving these aspirational targets will require balanced growth across the four sectors and across a diverse range of markets rather than growth at all costs.

To achieve these targets, Queensland will need to average a growth rate of international student commencements of more than five per cent per annum. This growth rate is in line with the Australian Government's National International Education Strategy. A defining feature for Queensland is our diversity. Of all Australian states, Queensland has the most diversified onshore student profile, measured by source market mix, field and course of study, as well as location of study. We need to maintain this diversity and employ strategies that play to our strengths. The modelling shows that by 2026 onshore enrolments may reach 193,250.

This would deliver an additional \$2.8 billion per annum in export earnings, adding to a total of \$7.5 billion. DAE estimate this would add \$1.7 billion to Queensland's gross state product at 2026 and create an additional 6,800 full-time jobs.



Benchmarks (2015): 16 per cent national market share, 103,251 enrolments, \$2.8 billion export revenue and 19,470 jobs

2026 target: 20 per cent national market share

Tracking: Year in review

Capitalising on the potential for regions

Queensland's regions will be key contributors to the success of the Strategy. The DAE 'business as usual' scenario projects student related expenditure (outside Brisbane) to rise from \$937 million in 2015 to \$1.5 billion in 2026. Under the aspirational target student related expenditure outside Brisbane could rise to \$2.4 billion in 2026. Given the opportunity to leverage tourism and the visiting friends and relatives (VFR) market we also aspire to increase the number of student visitor nights in Queensland regions generated from international education.



Benchmarks (2015): 34 per cent of international student nights outside the capital city and \$937 million student-related expenditure

2026 target: 10 per cent growth of international students outside the capital city and \$2.4 billion student-related expenditure

Tracking: Year in review

Student satisfaction

The Queensland Government, in partnership with the Australian Government and education institutions, carries out a biennial International Student Barometer (ISB) Survey. The ISB tracks and compares decision making, expectations, perceptions and intentions of international students. Queensland will continue to track our state performance against this benchmark to ensure we are meeting students' expectations and addressing any areas that may require action.



Benchmark (2014): 85.2 per cent overall student satisfaction

2026 target: To be determined after the 2016 ISB Survey

Tracking: Biennial ISB Report

Sector engagement and satisfaction

The success of the Strategy will also be measured through client satisfaction and engagement with Queensland Government services. From 2017 we will conduct the first IET Sector Survey to inform our work, measure impact and understand client expectations and satisfaction. Engagement will also be measured through applications to the IET Partnership Fund and support generated for joint projects and campaigns.



Benchmark (2017): To be determined after first client survey

2026 target: To be determined

Tracking: Annual IET Sector Survey Report

Queensland Government Commitment

The Queensland Government has committed \$25.3 million over five years to fund initiatives under four strategic imperatives: Promoting Queensland Internationally; Enhancing the Student Experience; Growing our Regions; and Connecting the Industry.

The imperatives were tested during state-wide consultation with more than 270 stakeholders, representing all parts of the IET industry. Stakeholders indicated support for the proposed direction and confirmed that focusing on the four strategic imperatives offered the most effective way forward.

Delivery of the Strategy and reaching our aspirations require a true partnership between government and industry. We have heard the stakeholders' message that we need to increase our existing efforts and invest strategically for the future. We need to be nimble to respond to market changes and opportunities. We need to be prepared for changes to visa frameworks, the value of the Australian dollar, global security issues and the Australian political landscape. We need to invest at grassroots level and bring innovation to us. And we need a way to keep score and change tack depending on the market situation.

It is for these reasons that three enabling initiatives have been created to ensure that Queensland Government investment is targeted, leverages partnerships and is closely monitored for impact.

Queensland's Enabling Initiatives

1 International Education and Training Partnership Fund

The IET Partnership Fund will provide financial support for collaborative initiatives that assist in positioning Queensland as a leader in international education. An annual fund of \$1.2 million will be available to consortia to deliver initiatives relating to the four strategic imperatives of the Strategy and will encourage matching funds to leverage greater investment in international education and training.

2 International Education and Training Partnership Plan

The IET Partnership Plan will build on advice from the sector to inform IETU's annual program of marketing and promotion. This plan will span sectors and regions with the aim to align collective marketing and promotional efforts. The Partnership Plan will be developed in concert with the sector and will include information about digital campaigns, trade fairs and events, cooperative marketing activities, alumni events, ministerial trade events and inbound familiarisation visits.

3 International Education and Training Summit

The IET Summit will bring together the industry and supporting partners to plan for future activities, reflect on strategy implementation and tackle emerging issues. The event will enable all sectors, regions and supporting service providers to coordinate, collaborate and engage with government. The event will be held in key locations across Queensland on an annual basis.

Under the strategic imperative, Connecting the Industry, an International Education and Training Advisory Group, chaired by the Ministerial Champion and comprising representatives from all sectors, will advise on implementation of the IET Strategy. The International Education and Training Unit (IETU) in Trade and Investment Queensland (TIQ) will act as the central point of coordination to deliver the IET Strategy.



Strategic Imperatives

The following section provides an overview of the remaining 33 initiatives that will be delivered across four strategic imperatives. The initiatives are designed to benefit all sectors, all regions and all Queenslanders. In their totality, this represents the most comprehensive suite of activities and targeted investment in Queensland's history to support the international education and training sector.

Promoting Queensland Internationally

Attract the best and brightest students from the most diverse range of markets across all sectors both onshore and offshore.

Enhancing the Student Experience

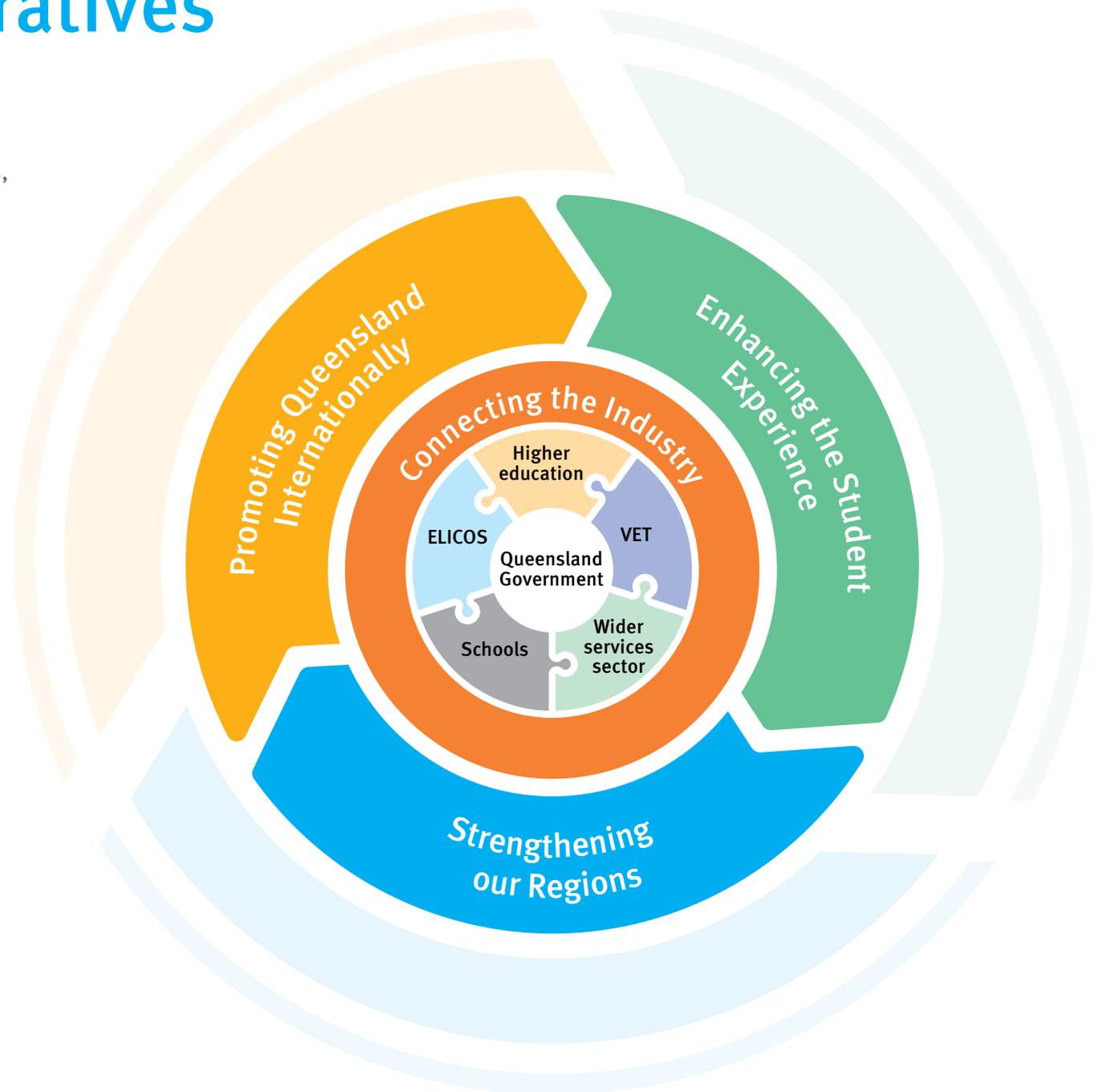
Improve student satisfaction with the quality of their experience both inside and outside of the classroom.

Strengthening our Regions

Increase the contribution of international education and training to regional economies and ensure that Queensland offers the most diverse, comprehensive and unique offerings to international students.

Connecting the Industry

Improve leadership, coordination and advocacy and develop a Queensland perspective on industry issues and opportunities.





Promoting Queensland Internationally

We will promote Queensland and its unique offerings to attract the best and brightest students from the most diverse range of markets across all sectors. In a crowded global marketplace, a highly visible global brand and differentiated student experience are essential to sustaining the international education and training industry in Queensland. Modernising the Queensland brand and understanding different market segmentations is a priority. In promoting Queensland, we will draw on our key regions and city destinations, working alongside national and

institutional partner branding. Through targeted and innovative marketing initiatives, conducted collaboratively with the Queensland international education and training sector, we aim to:

- Position Queensland as a preferred study destination and partner of choice for clients.
- Attract students from diverse markets, into diverse disciplines of study, in diverse locations.
- Respond to market opportunities through a collaborative approach to marketing and promotion.
- Employ targeted engagement strategies in line with priority markets and opportunities, including a focus on growing offshore programs.
- Generate more leads, business opportunities and referrals for the Queensland education and training sector, through the TIQ global network.

4
Showcasing
Queensland
to the world:
brand and
positioning

A new branding framework will be developed to best position Queensland and key student destinations, profiling the state's unique competitive strengths.

We will work with the sector, regional study locations and the Australian Government to rebuild a contemporary Study Queensland brand. We will engage experts to complete research on our brand attributes, Queensland's unique selling proposition and how to best position Queensland in a competitive market place.

There is significant scope to promote Queensland, and all of its diversity, as a destination for international students. It is vitally important that all of our promotional activity pushes the 'quality education' message, alongside the wonderful environmental and lifestyle advantages of Queensland. Core to this is the development of a strong brand and integrated campaigns at the city, state and national level.

5
Communicating
with the world

Creative and innovative digital resources and marketing campaigns will be developed to promote a modern and progressive Queensland.

We will deliver major web enhancements, improved social media presence, video content and virtual reality tools that promote Queensland. Digital resources will cover the full range of study areas and regional locations available in Queensland. There will be continued investment in at least two major campaigns per year building on the "Best Semester Abroad" and the "Ultimate Gap Year" campaigns. Priority areas for future campaigns include under 18s, VET, graduation travel and research students. In-market campaigns and ongoing content will be managed through the TIQ global network.

6
Major events
sponsorship,
participation
and attraction

Involvement in major targeted events will raise awareness and help position Queensland as a preferred study destination.

We will maximise Queensland's investment in key events such as the Gold Coast 2018 Commonwealth Games, the World Science Festival and the Australian New Zealand Agents Conference (ANZA). We will also work to attract and/or participate in education, training and research international events that showcase Queensland's international education and training excellence.

7
Bringing
the world to
Queensland
– inbound
familiarisation
tours

Significant decision makers and influencers from targeted countries will be hosted in Queensland.

We will host inbound familiarisation tours from targeted groups including overseas scholarship bodies, government policy makers, institutional partners, agents and journalists. We will work with the sector to prioritise other incoming delegations aligned to our key markets. The tours will provide opportunities for all education sectors to be profiled and will be outlined in the IET Partnership Plan.

8
Ministerial
education
training and
research
missions

Ministerial-led trade missions will be undertaken to consolidate relationships in existing markets and to support entry into emerging markets.

A forward program of Ministerial-led trade missions to strategic partner or emerging countries will raise Queensland's profile in these markets and help to facilitate business expansion for Queensland industry. We will ensure that education, training and research are also featured in other government travel where relevant.

9
Taking
Queensland
students to
the world

We will promote the value of two-way international education and work with providers to encourage more Queensland students to engage in international education.

- We will work with providers and the Australian Government in promoting the value of an international education experience during studies. This initiative aims to grow the number of Queensland students participating in student mobility activities (from schools, VET institutions and universities) and in national programs such as the New Colombo Plan and Endeavour Awards. By fostering the global experience either as an exchange student, study tour participant, intern or scholarship recipient, we will support global competence and build Queensland's brand not just as a destination, but as a partner of choice for international education.
- Young Queenslanders will be supported through Global Schools initiatives to develop an international mindset, enable them to communicate across languages and cultures, and position them to engage in the new opportunities of a connected global economy.

10
Maximise
global
partnerships
and delivery
options

We will work with Queensland providers, across all sectors, to grow our success in offshore delivery, executive leadership programs and global partnerships.

Queensland providers are active participants in the global education and training market. TAFE Queensland and VET providers are delivering skills training and consultancy throughout the Asia Pacific. Queensland school curriculum is delivered through innovative partnerships offshore and our advice is sought on a range of education and skills reform projects. Students and industry clients around the globe can engage with Queensland's world class teaching and research, through twinning partnerships, branch campuses and customised training programs. We will continue to map and promote Queensland's extensive global engagement. We will identify and respond to opportunities that match Queensland's industry capability. Improved data and research that quantifies the value and impact of global offshore delivery will be a priority.

11
Facilitating
business for
Queensland
– TIQ Global
Network

We will expand the state's global offshore network to place education and training specialists in 11 priority locations with a focus on growing international education, building Queensland brand awareness and responding to market opportunities.

Trade and Investment Queensland's offshore network will be expanded to include international education and training specialists that enable market access to Queensland's largest markets including: China, India, Middle East, Indonesia, Latin America, Japan, Korea, Singapore, Taiwan, Hong Kong and Europe. This will more than double the current efforts and ensure that Queensland providers are able to capitalise on market know-how and intelligence. International education and training specialists will deliver value to Queensland institutions seeking to grow and sustain markets. The IET Partnership Plan will outline activities and priorities by market and sector.

12
Grow
Queensland's
reputation as
a high-quality
research
destination

We will utilise the Queensland Government's Advance Queensland suite of initiatives to continue to grow Queensland's global reputation as a high-quality research destination.

This includes:

- Active promotion for international students and researchers to take part in Advance Queensland PhD scholarships program and fellowships program respectively
- Developing priority international agreements to drive global research engagement
- Initiating campaigns (digital and print) to promote Queensland research excellence in key global markets.

13
Embracing
disruption
to support
growth

We will utilise the Queensland Government's Advance Queensland suite of initiatives to build opportunities for investment and development of technology solutions that aid the growth of the international education sector.

This includes:

- Working closely with the EdTech community to support new approaches that transform international education and training
- Encouraging the formation and growth of EdTech companies through the suite of Advance Queensland programs
- Engaging with education and training providers to embrace digital disruption for the benefit of international education including, new approaches in fintech, online learning, simulated learning, digital platforms and student engagement.



Enhancing the Student Experience

Ensuring Queensland provides international students with the most positive and rewarding experience is crucial to the ongoing sustainability of the sector. This applies to the student experience both in and out of the classroom. Queensland's welcoming and relaxed lifestyle, warm climate and unique natural features have long attracted international visitors. This natural appeal, coupled with world-class quality teaching and infrastructure in a safe and clean environment, are all major attractions for international students.

The student experience begins well before arrival in destination. Students, their parents and agents will first consider Queensland's high-quality education and training institutions. This often includes consideration of academic reputation (via rankings), employment outcomes and word-of-mouth recommendations.

However, when considering an education and training provider, the vast majority of students will also investigate factors that contribute towards the total lived experience. This especially applies to accommodation, cost of living, transport, location, general living conditions and day-to-day practicalities. Again, reputation and word-of-mouth recommendations are a key consideration.

We will seek to create a positive student experience in Queensland for international students. This will be achieved by working with industry, government, students and the broader community to:

- Provide affordable, quality lifestyle options across Queensland, including accommodation, transport, social and cultural activities.
- Ensure access to accurate information before, during and after studying in Queensland.
- Give a voice to Queensland's international students to identify and address issues.
- Monitor quality issues that impact students inside and outside the classroom.
- Enhance employability options for students with international experience including access to work integrated learning, internships and volunteering.



“ The concept of enhancing student experience is all about community engagement. We need people to understand just what international students bring to this State. ”

Quote from IET Forum Participant 2016



14
Improving
pre-departure
information and
awareness

Detailed, timely and clear student pre-departure information will be provided.

We will ensure that students coming to Queensland have access to relevant information prior to arriving to help them make important decisions and to support the transition to studying in Queensland. We will work with providers and destinations to create sector or regional specific pre-departure content, deliver digital education campaigns and explore options for in-country joint pre-departure sessions.

15
Affordable
and quality
accommodation

We will work to support affordable and quality student accommodation options and promote this as a strength for Queensland.

We will achieve this through:

- Ensuring that planned growth in international students is supported with affordable and quality accommodation options and that Queensland continues to be at the forefront of innovation in approaches to planning, regulation and investment attraction.
- Working directly with accommodation providers, regulators, and local governments to design solutions that improve information for students in finding and selecting appropriate accommodation.
- Engaging with schools and the hosts of under 18s, to investigate options to grow homestay and accommodation for this market.
- Identifying and leveraging opportunities for new student infrastructure through projects such as the Cross River Rail (CRR) and the CRR Economic Development Strategy in Brisbane and the City Deals project in Townsville (by way of example).

16
Transport
connectivity
and
accessibility

Accessible and affordable student transport options are an important factor for all students.

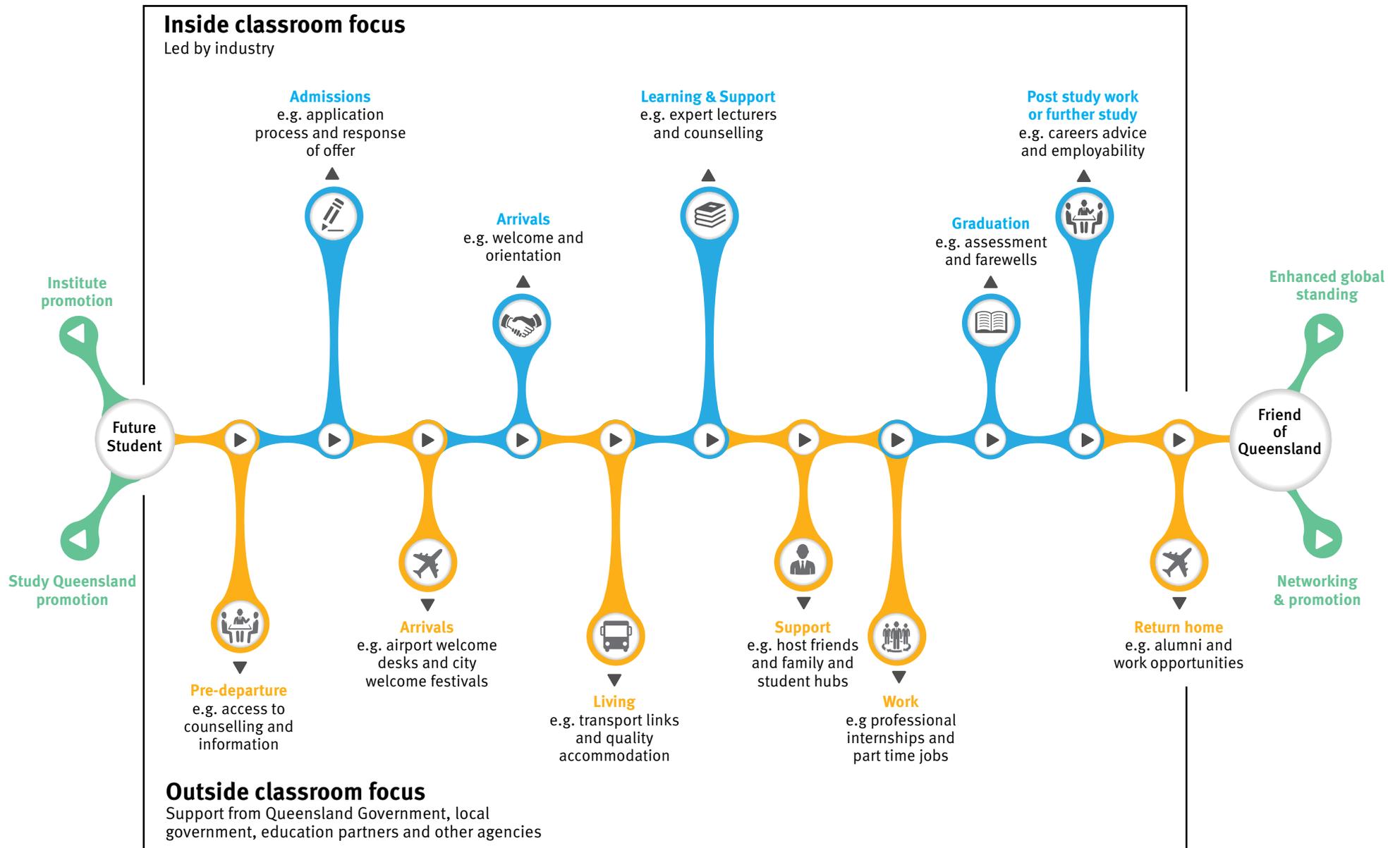
We will work with Department of Transport and Main Roads and other local service providers to promote eligibility for student concession fares, develop new transport options and consider local connectivity issues that impact student experience.

17
Enhancing
employability

We will create a package of activities aimed at enhancing employability for students, which benefit students, employers and providers.

We know that global students highly value work experience that provides real-world skills. There is a role for government in working with students, providers and employers to enhance employability. We will achieve this through:

- Creating an online platform as a central repository of available internships, Work Integrated Learning (WIL) and work experience programs. The platform may also promote skills and workshops for students, information for business and ways for the community to engage.
- We will expand the pilot with the Australia China Business Council and work with other bilateral business councils to roll out the Export Partnership Program, which offers internships with Queensland exporters.
- We will work with the state's 115 accredited Visitor Information Centres (VICs) to offer volunteering experiences for students with international experience.
- We will keep abreast of regulatory changes and programs at a national level and seek to create new ways for students and business to benefit.
- We will support campaigns, through institutions and student hubs, to ensure that students have information regarding their work rights in Queensland.



18
State-wide
student hubs

Local and relevant support for international students will be provided through student hubs.

We will work with local stakeholders to create a network of state-wide student hubs and referral centres. Hubs will provide a range of services depending on the local need and will offer at a base level – referral to service providers, deliver social and cultural activities to support integration and promote further study options in Queensland. In times of crisis, the hub will offer support directly to students and stakeholders. A Brisbane Student Hub pilot is currently underway with Study Brisbane, Study Queensland, the State Library and MDA Ltd as partners.

We will work with Queensland's Visitor Information Centre (VIC) network to explore options for greater student services and engagement, including 115 accredited VICs offering referral to the 1800 QSTUDY hotline for students and localised initiatives depending on the region. All students in Queensland will have access to the 1800 QSTUDY hotline to call for advice and referrals. Further applications for student hub funding will be considered through the IET Partnership Fund.

19
Alumni
engagement

We will invest in alumni engagement activities that recognise the value of international alumni as advocates for the Queensland experience.

'Friends of Queensland' events aligned with key trade missions and other activities will acknowledge alumni as brand ambassadors. We will work with providers to support alumni-led mentoring programs for students and ensure that Queensland alumni (inbound and outbound) are included in the Global Alumni Strategy. Alumni excellence will be recognised through the annual Queensland IET Excellence Awards.

20
Harnessing
the student
voice

International students will be given a voice through the first Queensland International Student Advisory Panel and other opportunities to meet decision makers.

We will work with the Council for International Students Australia (CISA) to create the Queensland International Student Advisory Panel. The Panel will be a key voice to government on the needs of students and will be led by a CISA Queensland representative. The panel will provide advice to the IETU and government on policy and programs relating to international education and training. Representation will span students from all sectors and membership of CISA is not a requirement. We will support initiatives such as 'International Students Meet Parliament' as a means to celebrate the contribution of international students. Targeted students will be chosen to share their experiences with Queensland Members of Parliament.

21
Monitor
quality

We will work with responsible agencies to ensure quality is maintained inside and outside the classroom.

We will work with the Australian Government, Australian Skills and Quality Agency (ASQA), Tertiary Education Quality and Standards Agency (TEQSA), Student Ombudsman, Fair Work Australia and Queensland agencies to ensure we monitor quality issues as they relate to the overall student experience. This includes taking a proactive approach to report non-compliant provider behaviour or unscrupulous marketing. We will also, through student hubs and provider networks, proactively monitor issues in accommodation, transport, health provision, access to services and other areas that may negatively impact student experience and act accordingly.

22
Student
Innovation
Challenge

Micro grants of up to \$2,500 will be managed through the Student Innovation Challenge.

The Challenge will encourage solutions 'by students for students' and is designed to fast track solutions to complex student challenges. These micro grants will encourage innovation and entrepreneurship, while also improving the student experience.

Strengthening Our Regions

A defining feature of Queensland's international education and training industry is the way the industry's activities are dispersed across Queensland. In the financial year 2014-2015 around 34 per cent of all international student nights in Queensland were outside the state capital of Brisbane, compared to just 12 per cent of similar students in New South Wales studying outside Sydney, and four per cent in Victoria studying outside Melbourne.¹

This means that all major Queensland student centres benefit from the cultural and economic diversity that comes with international education and training, including the development of a more inclusive, welcoming and multicultural community in every corner of the state.

Queensland's diversity offers some unique international education and training opportunities that can be a point of difference for some students. For example, Queensland has major student centres in tropical and sub-tropical cities, attracting global employers such as Boeing Australia, Virgin Australia, Mitsui, General Electric, Warner Bros, Ernst & Young, and many international banks and other global organisations.

In 2015, the economic contribution of student-related export revenue (outside Brisbane) was almost \$1 billion. Cities outside the capital also benefit from increased tourism, from both students themselves and their visiting friends and family and by providing other goods and services to the education industry.

The Queensland Government recognises the importance of Regional Study Organisations (RSOs) and local government partnerships that support RSOs in Brisbane, Gold Coast, Sunshine Coast, Townsville and Cairns. Local partnerships are also being explored in Moreton Bay, Toowoomba and Rockhampton.

The Queensland Government is committed to strengthening the state's regions to offer diversity in courses and lifestyle options for students and to provide economic and social opportunities for regional Queensland. We will achieve this by:

- Ensuring coordination and collaboration with local government and RSOs.
- Leveraging the linkages between other regional services and industries, such as tourism.
- Building leadership and capacity in all regions.
- Understanding the unique selling proposition for students studying outside of a capital city.
- Providing local access to information and support for international students.

¹ The opportunity and imperative for Queensland's international education and training sector, Deloitte Access Economics, May 2016.



**“
Whatever we do, we need
to show that international
education and training
is part of the city, that
students breathe new
life into the city.”**

Quote from IET Forum Participant 2016



23
State-wide
student cluster
groups

Regional international education clusters will be supported to adopt a local response to regional opportunities.

We will partner together to deliver better outcomes for Queensland. RSOs will deliver local engagement, education pathway alignment and strategic projects that are relevant to the strengths and priority areas of regions. Clusters and other local consortia partners may bid for assistance through the IET Partnership Fund to support local activities. These may include welcome desks, welcome ceremonies and festivals, student and community integration programs, accommodation/homestay initiatives, data and research on student needs and regional issues, marketing and promotion activities.

24
Local
government
partnerships

A strong partnership with local government will help localise our international student offering.

We will work with local governments to enhance the role that council and local communities play in support of international education. Councils will also be invited to be part of the IET Summit and offshore marketing activities. Councils may apply in partnership with local partners for projects under the IET Partnership Fund.

25
IET and tourism
collaboration

We will work with Tourism and Events Queensland (TEQ), education partners and local tourism providers to foster and promote opportunities for edu-tourism.

We will grow the participation in edu-tourism to support state and regional economic development. This will include supporting the development of edu-tourism products, student ambassador travel campaigns and visiting friends and relative campaigns (including graduation travel). In collaboration with Queensland's Visitor Information Centres (VICs), we will also deliver benefits for students, providers and the local communities they serve through the student referral approach. As direct flights are also a key decision-making factor for students, we will work with TEQ and Queensland's airports to provide data that supports more routes between high-demand locations and Queensland's regions. These objectives are closely aligned to *Advancing Tourism 2016-20: Growing Queensland Jobs*.

26
Regional
best practice
network

A new community of best practice in regional international education and training will foster information sharing and continuous improvement across the state.

A new Community of Practice (CoP) for all international student centres in Queensland will provide opportunities for the regions to connect, learn from each other and to share best practice. The CoP will focus on approaches to address local issues affecting students, sharing information on macro trends and data, and aligning marketing and promotional activities where possible. The CoP will be made up of representatives from all regions involved in international education. The CoP will meet biannually and engage through digital platforms to share ideas, discuss strategy implementation and track policy issues.

27
Supporting an
internationalised
schools
sector across
Queensland

A strong and diverse international program at the schools level is critical to the growth and sustainability of Queensland's international education and training sector.

We will:

- Support the attraction of students into our schools.
- Increase the number of schools that are accredited to enrol international students and increase the homestay capacity required to support this expansion.
- Ensure that the unique needs for under-18 students are catered for in the delivery of the Strategy.
- Make research opportunities in regional universities more attractive by making state education for school-aged dependents more affordable.
- Use new and established pathways from school to further education to encourage students to continue their education and training in Queensland.
- Invest in research to track the outcomes of international school students and their pathways to further education in Queensland.

Connecting the Industry

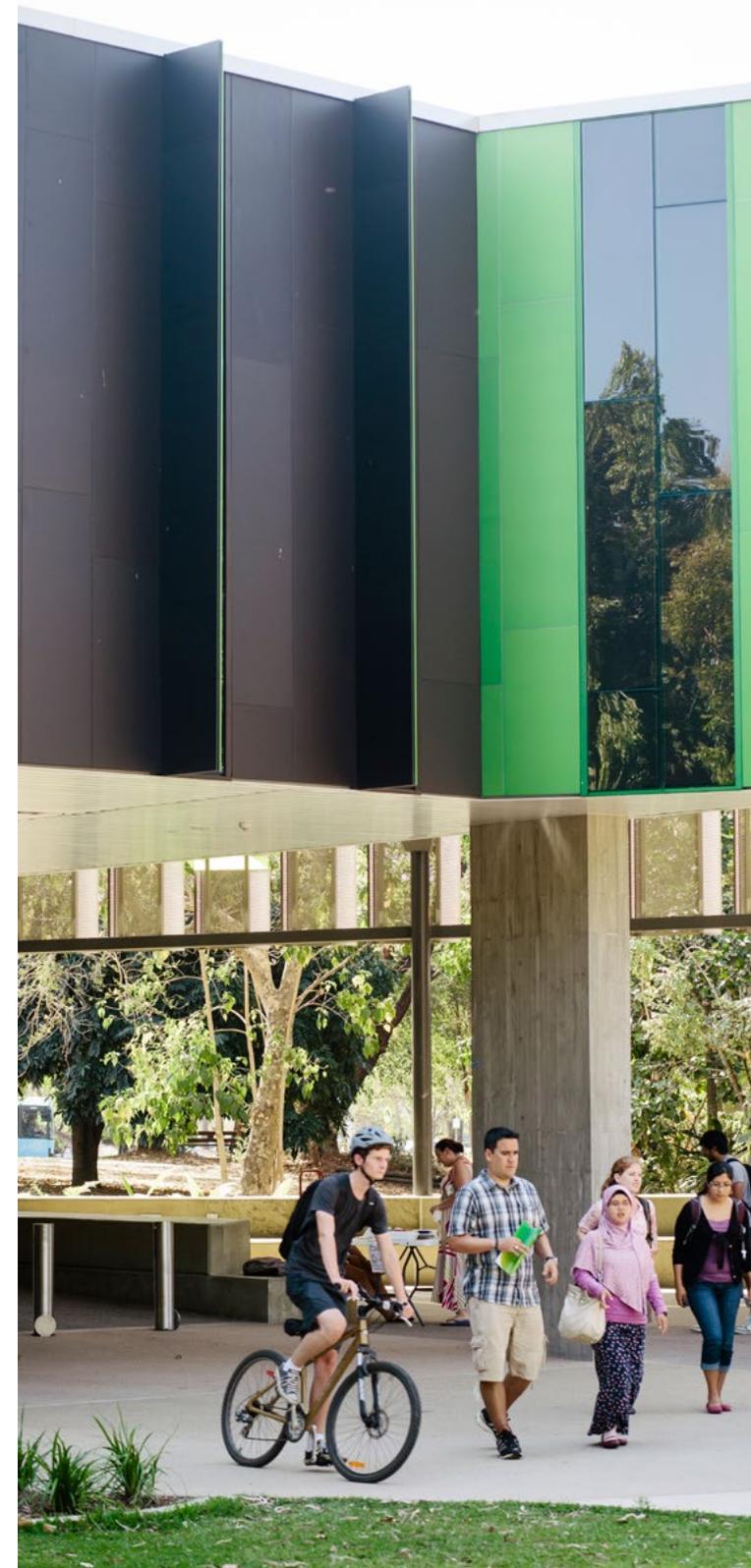
A new, more collaborative model of planning is a prerequisite to guide the effective delivery of the Strategy across the international education and training industry. This is particularly important given that Queensland's international education and training landscape is so complex. Its four key sectors — higher education, VET, schools and ELICOS — traverse both public and private sector, in more than seven regional locations.

In addition to the four key sectors, there are other important stakeholders who intersect with the industry including corporate educators and trainers, internship service providers, edu-tourism operators, EdTech companies and other businesses undertaking niche activities that fill the 'gaps' in the traditional offering. To meet this challenge, the Strategy establishes an important framework for leadership, coordination and partnerships across sectors, Queensland's regions and nationally.

A Ministerial Champion, advised by an enhanced industry advisory group and a cross-government working group, will drive the Queensland Government's partnerships with all sectors and regions.

By establishing and solidifying networks and connections across and between the industry, we will:

- Foster collaboration to ensure Queensland retains its competitive edge through a united approach
- Ensure the continued development and promotion of clear study pathways
- Promote and celebrate successes across the industry to foster ongoing innovation and improvement
- Be in the position to respond quickly to market changes and industry challenges
- Ensure the industry is skilled and able to deliver innovative solutions to global education, training and research.



28
International
Education and
Training Unit
(IETU)

**The IETU within
Trade and Investment
Queensland will act
as the central point of
coordination to deliver
the IET Strategy.**

The IETU will engage internally with key government agencies, externally across the key sectors and industry partners, and offshore with TIQ Business Development Managers. This approach will ensure that all sectors are represented in initiatives, that inter-departmental collaboration is fostered and that industry is connected to TIQ globally. A cross-government working group will meet three times per year to track progress of the Strategy and to address emerging issues and opportunities as they arise. New ways of working including piloting an Industry Innovator in Residence program and a student work placement program, will enable IETU to engage directly with students and the sector in delivering the Strategy.

29
International
Education
and Training
Advisory Group
(IETAG)

**A new Queensland IETAG
will advise government
on the needs of the
industry and will support
the implementation of
the IET Strategy.**

The IETAG will be chaired by the Ministerial Champion and will meet three times per year with advice being delivered directly to the Queensland Government and related Ministers. The IETAG will be comprised of senior representation from all sectors and will advise government on the implementation of the Strategy and key initiatives.

30
Ministerial
Champion

**Leverage the support
and leadership of a
Ministerial Champion
for the sector.**

We recognise the importance of a Ministerial Champion for the sector, both locally and internationally. We will work to ensure that Queensland takes a holistic approach to ministerial engagement across all portfolios to support the sustainable growth of IET.

31
Queensland
IET Excellence
Awards

**Queensland IET
Excellence Awards will
recognise industry
leaders and students for
their achievements and
help drive our strategy
aspirations.**

The Queensland IET Excellence Awards will recognise industry leaders, community and business contributors and current and past students for their achievements. The awards will celebrate individual success, aligned to the goals of the Strategy and will inspire innovation in the sector. Education providers will continue to be recognised for their export excellence through the Premier of Queensland's Export Awards.

32
Connecting with
the national
agenda

**Queensland will
work with Australian
Government counterparts
to ensure a leveraged
approach to branding,
student experience and
data collection.**

The IETU will work as part of the Commonwealth – State and Territories Working Group to ensure alignment of the Strategy implementation, brand and research. IETU will continue to closely monitor visa issues, reputational risk and other market changes and will actively contribute to national advocacy with peak bodies and other states and territories.

33
Engage on
sectoral issues

**We will work with the
sub-sectors and service
providers that support
the sector to ensure
continuous improvement
and coordination across
the industry.**

This will include engaging with higher education, VET, ELICOS, schools, edu-tourism operators, executive education providers, education agents, accommodation providers and other support industries through informal networks. Project-based working groups will be formed to guide initiatives as required.

Evaluation Framework

In order to ensure that the Strategy is working as planned we will measure our success against a comprehensive evaluation framework. This includes the monitoring and evaluation of specific initiatives, as well as any corrective action, if required.

The evaluation will be undertaken by TIQ on an annual basis, in consultation with key stakeholders. It will involve three parts:

1. Initiatives

How much progress has been achieved in the past 12 months?

What have we learnt and what can we apply to other areas? If progress is not according to timeframe, what corrective action needs to be taken to ensure the initiatives are on track?

2. Stakeholder mapping

Has the Strategy met the needs of stakeholders?

This will include annual client satisfaction, a biennial student survey (or surveys) and whole of government feedback.

3. Policy outcomes and impact

Are key policy outcomes being met and what is our impact?

How can resources be more effectively allocated to achieve better outcomes? What has changed in the marketplace and operating environment that requires a new approach?

34
Community
engagement

We will embed international student 'welcome' and ongoing community engagement into other community programs.

We recognise the importance of the Multicultural Queensland Charter and the *Multicultural Recognition Act 2016* in nurturing a welcoming and multicultural society. We will work with Multicultural Affairs Queensland, not for profits and directly with the community to ensure that international students are included in community welcome events and activities. A 'Welcome to Queensland' campaign, both digital and face to face, will be developed in partnership with stakeholders. Further initiatives may be funded through the IET Partnership Fund.

35
Sector capacity
building and
leadership
development

Support relevant professional development and issue-based workshops to build the capacity of the sector.

Professional development programs will complement the annual IET Summit and priority areas for learning will be informed by the sector. This approach will support sector-based programs that encourage shared knowledge and information dissemination, ideally delivered in partnership with peak bodies and/or RSOs.

36
Improving data
and research

We will support the development of improved data collection and priority research to improve performance of the international education and training sector.

Improved data and a focused research agenda, including longitudinal studies to show the impact of international education and government support are a priority. We will work with the Australian Government to improve data collection and research. We will prepare a research agenda, renewed annually, in partnership with the sector to encourage new research.

Implementation

The IET industry operates in a dynamic and fast changing global context. Changes to visa frameworks, the value of the Australian dollar, global security issues and the Australian political landscape all impact the sustainability of the sector.

The first year of Strategy implementation is critical to set us up for success and lay the foundations. The table below outlines a select number of milestones to be achieved over the next 12 months. This is by no means an exhaustive list but a representation of key activities to be delivered.

First Year Milestones

2016	
July	Launch draft IET Strategy
August	State-wide consultation
September	Brisbane Student Hub opened
October	Best Semester Abroad
November	IET Implementation Roadshow
November	Regional Community of Practice
2017	
January	International Education Partnership Fund Round 1 opens
March	Student Advisory Panel meets
March	International Education and Training Advisory Group
March	Inaugural International Education and Training Summit
March	World Science Festival and super familiarisation tour (key decision makers/ partners across English language, VET, higher education and schools)
March	Queensland presence at Asia Pacific Association of International Education Conference
April	Australian New Zealand Agents Workshop, Cairns, including agent familiarisation tour
May	Queensland Cup Finals in Chengdu
June	International Education Partnership Fund Round 2 opens
July	International Education and Training Advisory Group meeting
July	2018 IET Partnership Plan released
August	Launch of Student Innovation Challenge
September	International students meet Parliament event
October	Queensland International Business Series and Premier of Queensland's Export Awards
November	International Education and Training Advisory Group meeting
November	International Education Excellence Awards



Queensland

AUSTRALIA

endless opportunities

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