

## Report to the Future Melbourne (International Engagement) Committee

Agenda item 6.10

### Support for International Education and Melbourne's economic recovery

8 December 2020

**Presenter:** Andrew Wear, Director Economic Development and International

#### Purpose and Background

1. The purpose of this report is to inform Councillors of the City Economy Advisory Board's (CEAB) advice in relation to the international education sector and seek the support of both the Victorian and Australian governments in having international students return to the City of Melbourne.
2. The CEAB was established by Council in July 2020 to coordinate and draw on advice and ideas from business and community leaders in relation to the response to the impact of COVID-19 on the central city economy. Chaired by the CEO, the CEAB consists of representatives from industry associations, private sector organisations, state and Commonwealth government departments, universities and economic advisers (refer Attachment 2).
3. The CEAB has subcommittees focused on key challenges faced by the city. The Knowledge City and International Education subcommittee, chaired by Martin Bean, Vice Chancellor of RMIT, has provided recommendations regarding the reactivation of the international education sector. The recommendations aim to redesign Melbourne's knowledge system, fostering new opportunities to support transformational experiences and create a thriving knowledge city (refer Attachment 3).
4. Pre-COVID, there were more than 200,000 international students from 170 countries living in Melbourne. International education has been Victoria's largest services export for over ten years and in 2019 it generated \$13.7 billion in export revenue for the state.
5. The Council has supported international students during the COVID-19 crisis via a number of programs. These include an International Education Virtual Workshop, the Our Shout food voucher system, online wellbeing initiatives, pathways to employment programs and advocacy to other governments to increase their support for international students.

#### Key issues

6. COVID-19 has devastated the international education sector in the City of Melbourne, with profound economic and social impacts. With no new arrivals, international student numbers are currently at half of pre-COVID19 levels. Economic modelling undertaken by PWC estimates the education sector in the City of Melbourne will experience a \$1.517 billion drop in output due to COVID-19, with 6800 fewer jobs. For every dollar lost in university tuition fees, another \$1.15 is lost in the broader economy due to a reduction in student spending.
7. International students are currently not able to arrive or return to Victoria from overseas due to current restrictions on incoming arrivals. The Australian government gave states and territories a deadline of the end of November to finalise plans for the safe return of international students. The Victorian Government did not meet the deadline, but advises that it is continuing to work on a plan.
8. The Victorian budget, released on 24 November, was built on an assumption that there would be no significant return of international students until 2022.
9. Given the success with which Australia has contained COVID-19, Australia is an extremely attractive destination for international students. If international students are able to return to Australia, this could represent a strategic opportunity to gain market share.
10. Countries such as Canada and the United Kingdom are already allowing the return of offshore students. If international education is unable to return to Australia in 2021, Australia risks losing market share to other countries, with severe long-term consequences.
11. Key recommendations from the Knowledge City and International Education subcommittee include:
  - 11.1 Create a dynamic digital platform to provide immersive and transformative student experiences.
  - 11.2 Provide students with 'a welcome like no other'.
  - 11.3 Ensure international students have access to quality transport and accommodation, enhancing

- 11.4 the value proposition of Melbourne as a study destination.
- 11.5 Develop and foster a vibrant set of innovation precincts across Melbourne.
- 11.6 Over the long-term, create more sustainable and open public spaces.
- 12. While some of these recommendations are being considered for incorporation into Council programs, many will require the support of the Victorian Government to deliver. These include, but are not limited to:
  - 12.1 A standardised accommodation accreditation system.
  - 12.2 Public transport discounts for international and postgraduate students.
  - 12.3 Further development of the Study Melbourne website.
  - 12.4 Support for students while in quarantine.
  - 12.5 Development of key innovation precincts, including Melbourne Innovation District, Parkville and Fisherman's Bend.
- 13. Recently, the Victorian Government announced a new \$33.4 million package to support policies and programs for the state's international education sector. As the State rebuilds from the economic and social issues caused by the COVID-19 pandemic, this funding package seeks to re-establish Victoria's position as Australia's top destination for international students.

**Recommendation from management**

- 14. That the Future Melbourne Committee:
  - 14.1 Notes that the return of international students will be critical to the recovery of the City of Melbourne economy.
  - 14.2 Requests the Lord Mayor urgently write to the Victorian and Australian governments requesting that all necessary measures be put in place to allow for the return of international students in time for the 2021 academic year.
  - 14.3 Requests the Lord Mayor write to the Victorian Government seeking its support for implementation of the recommendations from the Knowledge City and International Education Sub-Committee of the City of Melbourne City Economy Advisory Board.

**Attachments:**

- 1. Supporting attachment (Page 3 of 18)
- 2. City Economy Advisory Board – Terms of Reference (Page 4 of 18)
- 3. Knowledge City and International Education Sub-Committee Membership and Recommendations (Page 7 of 18)

## Supporting Attachment

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### Legal

1. There are no direct legal issues arising from the recommendations.

### Finance

2. The recommendations have no financial issues.

### Conflict of interest

3. No member of Council staff, or other person engaged under a contract, involved in advising on or preparing this report has declared a material or general conflict of interest in relation to the matter of the report.

### Health and Safety

4. In developing this proposal, no Occupational Health and Safety issues or opportunities have been identified.

### Stakeholder consultation

5. The Knowledge City and International Education Sub-Committee convened leaders across Melbourne's education community. The Sub-Committee presented the five recommendations to the City of Melbourne City Economy Advisory Board.

### Relation to Council policy

6. Alignment with Council Plan - A city for people, A creative city, A prosperous city and A knowledge city

### Environmental sustainability

7. In developing this proposal, environmental sustainability issues have been considered and no direct issues were identified.



## TERMS OF REFERENCE CITY ECONOMY ADVISORY BOARD 2020

### BACKGROUND

Prior to COVID-19, City of Melbourne's economy was worth a record \$104 billion, representing a quarter of Victoria's gross state product and 7 per cent of Australia's gross domestic product. It comprised almost 500,000 jobs, including more than 240,000 in the CBD alone. The City of Melbourne is committed to ensuring the City economy not only recovers, but continues with a positive growth trajectory. To achieve this, recovery and prosperity needs to be coordinated, timely, informed, considered and consistent with the best interests of the city's stakeholders, residents, businesses, workers and visitors.

The City of Melbourne is responsible for the effective discharge of its duties under the Local Government Act and other relevant legislation. In upholding these duties, the Council is supported, where necessary and appropriate, by the provision of specialist technical advice.

With respect to the COVID-19 pandemic, this advice can be sought and discussed through an external expert panel to provide advice on economic recovery matters. The establishment of a City Economy Advisory Board will help shape the role of the City of Melbourne in future recovery efforts and is consistent with City of Melbourne governance principles.

### PURPOSE AND OBJECTIVES

The purpose of establishing the City Economy Advisory Board is to ensure the City of Melbourne harnesses strategic input from relevant industry and government representatives to ensure that the City economy responds to the impacts of COVID-19 on the central city.

### SCOPE

The role of this City Economy Advisory Board is to:

- ensure coordination of key economic influencers that impact on the City
- consider advice and ideas from business and community leaders
- assemble qualitative and quantitative data
- ensure state and Federal Governments understand what is required to respond to the impacts of COVID-19 on the central city economy
- provide options for Council consideration
- promote response and recovery activities supported by Council.

### MEMBERSHIP

The City Economy Advisory Board will be chaired by the Chief Executive Officer of the City of Melbourne.

Membership of the group will be drawn from key experts and advisors identified from various influential bodies and organisations, but not limited to State Government, Commonwealth Government, economic advisors, education institutions, social services sector and private sector representation.

## **SUB-COMMITTEES**

There are a number of sub-committees which will feed into the scope of this City Economy Advisory Board. These are outlined below:

### **Functionality of the City**

How might we influence the movement of people and goods across the city, including in and out of buildings in a safe and socially distanced manner? With a focus on varying facets of mobility: pedestrianisation, public transport, private vehicles, parking, freight, logistics, and wayfinding signage.

### **Economic Infrastructure**

How might we influence and stimulate growth through physical developments in the public and private realm? With a focus on influences on the property market, the future of the construction industry and stimulus funding from federal and state governments.

### **Bringing People Back to the City**

How might we bring domestic, interstate and international visitors back to the City of Melbourne? With a focus on attracting high-value visitor segments through marketing, branding and promotion.

### **City Events and Activation**

How might we leverage our events ecosystem to ensure the city remains active? With a focus on international and national-scale events and consideration of what events should be held when. This may include cancellation of some major activations and prioritisation of others.

### **Retail and Hospitality**

How might we ensure our street fronts remain vibrant and prosperous? With a focus on increasing foot traffic, addressing empty retail premises through the provision of activations, renegotiating leasing terms, and provision of information and advice. Working with retailers and the hospitality sector to transform business models and make the link to events and marketing activity.

### **Knowledge city and International Education**

How might we revitalise Melbourne's international education sector and ensure the university sector remains vibrant and prosperous? With a focus on immigration settings and innovative approaches.

### **Economic Strategy**

How might we plan strategically to revitalise Melbourne's economy? With a focus on using all available metrics to evaluate our activities and drive our strategic response to recovery, including foot traffic numbers from pedestrian sensors, expenditure data and other key reports. Responses may range from regulatory reform, to investment in skills or industry development.

## **TENURE**

12 months with an option to extend.

## **AGENDA ITEMS**

All agenda items will be forwarded to the Coordinator by 5pm five working days prior to the next scheduled meeting. Supporting papers will be forwarded to the Coordinator by 5pm three days prior to the next scheduled meeting.

## **MINUTES**

The minutes of each board meeting will be prepared by the Coordinator. Full copies of the minutes, including any attachments, will be provided to all members no later than 5pm three working days following each meeting.

**FREQUENCY OF MEETINGS**

The City Economy Advisory Board will initially meet fortnightly with a move to monthly or as required, however frequency will be reviewed and amended if needed in exceptional circumstances. Board members will nominate a proxy to attend a meeting if the member is unable to attend. The member will inform the Chair of the substitution prior to the scheduled meeting. The nominated proxy will provide relevant comments/feedback about the attended meeting to the Board member they are representing.

**QUORUM REQUIREMENTS**

A meeting quorum will be the majority of members.

**AMENDMENT, MODIFICATION OR VARIATION**

These Terms of Reference may be amended, varied or modified in writing after consultation and agreement by Board Group members.

**COORDINATOR**

The coordinator for this group is Andrew Wear, Director Economic Development, City of Melbourne:  
[Andrew.Wear@melbourne.vic.gov.au](mailto:Andrew.Wear@melbourne.vic.gov.au)

# **KNOWLEDGE CITY & INTERNATIONAL EDUCATION**

City of Melbourne Economic Advisory Sub-Committee  
Recommendations

## Sub-Committee Overview

The Knowledge City and International Education Sub-Committee convened leaders across Melbourne's education community to explore, design and imagine a responsive knowledge city for a mid-pandemic world.

<b>Problem to Solve</b>	How might the City of Melbourne foster a more innovative, connected and supportive knowledge system to ensure the university sector remains vibrant and prosperous in a mid-pandemic Melbourne?
<b>Process</b>	The Sub-Committee met four times over the 6-week sprint, with meetings chaired and facilitated by RMIT.
<b>Framework</b>	The Sub-Committee meetings followed a four-part framework, created to explore the critical areas of focus identified in the initial meeting. The framework centered around three key aspects of the student journey – attracting, supporting and fostering long-term connections with students – as well as internal and external characteristics of Melbourne's knowledge system. The completed framework is available in Appendix A.
<b>Data</b>	Student perspectives were collected to verify the emerging directions of the Sub-Committee's recommendations, through surveys administered by the participating education institutions and the City of Melbourne. Aggregated survey data is available in Appendix B.
<b>Emerging Ideas</b>	Emerging ideas were recorded in a shared document, structured around the four areas of the Sub-Committee's framework. These ideas formed the foundation for the final 5 recommendations. The complete list of ideas is available in Appendix C.

## Sub-Committee Membership

The Sub-Committee membership convened diverse perspectives across Melbourne’s education ecosystem, providing rich discussion around immediate student needs and longer-term priorities to strengthen Melbourne’s knowledge system.

Participants	Organisation
Mr Martin Bean, CBE	Vice-Chancellor & President, RMIT University (Chair)
Prof Vishaal Kishore	Innovation & Public Policy, RMIT University (Facilitator)
Ms Michelle Fitzgerald	Chief Digital Officer, City of Melbourne
Prof Michael Wesley	Deputy Vice-Chancellor (International), The University of Melbourne
Mr Steve Berridge	Senior Vice President Future Students and Planning, Victoria University
Mr Phil Honeywood	Director, International Education Association of Australia (IEAA)
Ms Sally Curtain	CEO, Kangan Institute, TAFE
Mr Nicolas Hunt	CEO, William Angliss Institute, TAFE
Mr Tomas Johnsson	CEO, UniLodge Student Accommodation
Ms Emma King	CEO, Victorian Council of Social Service (VCOSS)
Mr Dugald Murray	Executive Director Advocacy, Strategy and Brand, Victorian Chamber of Commerce and Industry (VCCI)
Mr Jeff Malone	CEO, BioMelbourne Network
Ms Sophie Travers	Acting Director International and Civic, City of Melbourne
Mr Layton Pike	Chief Global Advisor, RMIT University
Mr Gary Lee	International Education Project Coordinator, City of Melbourne
Ms Emma Forster	Smart Cities Project Officer, City of Melbourne
Ms Dominique Wiehahn	Project Coordinator, Policy, Strategy & Impact, RMIT University

# Recommendations

## Knowledge City & International Education Sub-Committee recommendations for consideration by the City of Melbourne.

### 1. Fostering digital connection through a One-Stop Digital Community

Creating a dynamic, digital platform to transform crisis into opportunity, providing immersive and transformative Melbourne student experiences. This platform will enable prospective students to connect with virtualised experiences of key aspects of the City's brand, provide a fluid resource for current students to access support and opportunities, while also creating long-term opportunities for engagement with the City's global community of alumni. Through an ethos of connection, the Hub will use a partnership approach to create new ways for industry and government to harness Melbourne's diverse student and alumni communities in the City's reactivation and recovery.

#### What's next

- Develop an integrated plan with Victorian State Government, enabling synergies between the Study Melbourne website and the City's Digital Hub
- Explore technical partners to build the functionality of the Hub, ensuring readiness to welcome international students back to Melbourne
- Explore content partners, drawing on the City's industry networks to secure discounts, opportunities and activities to host on the Hub
- Work with the membership of this Sub-Committee to launch the Hub and connect with prospective students, current students and alumni

### 2. Providing students with a welcome like no other

Supporting students' immediate needs in a mid-pandemic moment and preparing them for life-changing experiences in a new city for a new world. This welcome will meet the urgent needs of the present context, providing support, connection and entertainment for students pre-arrival and throughout quarantine via the Digital Hub.

Post-quarantine, the welcome will continue to foster a sense of connection and community, through City-hosted events, buddy systems and cultural tours. By ensuring students are engaged in Melbourne's vibrant, multicultural and student-centric identity from Day 1, this initiative will reactivate the vibrancy and connectivity of Melbourne's diverse knowledge city.

#### What's next

- Devise an integrated plan with the Victorian State Government about the elements to be included and potential areas of collaboration
- Reactivate the Welcome Stands at Melbourne Tullamarine and Avalon airports, greeting students and directing them to the Digital Hub
- Design and broker a partnered package of support for students while in quarantine, including items such as food delivery discounts, virtual events and entertainment available via the Digital Hub

## Recommendations (continued)

### Knowledge City & International Education Sub-Committee recommendations for consideration by the City of Melbourne.

#### 3. Voice – and brand – for a cosmopolitan Melbourne for a mid-pandemic age

Providing a singular voice for Melbourne, which amplifies the key elements of the City's brand and advocates for the reactivation of a more inclusive, innovative and vibrant city. Through championing localised interests beyond the City's control – including aligning travel concessions for international students with those available to domestic students – this voice will support enhanced collaboration with the State Government to increase the value proposition of Melbourne as a study destination and strengthen Melbourne's broader Knowledge City brand.

##### What's next

- Advocate, on behalf of all parties, for the Minister for Transport to allow international students access to the same transport concessions as domestic students
- Petition the State Government to implement a standardised accommodation accreditation system, to improve the accessibility, safety and quality of the Melbourne student experience
- Advocate for the co-creation of pathways within Melbourne's new economy, to embed the student community in the city's reactivation

#### 4. Activating and connecting precincts for enhanced innovation

Investing the City's planning, strategic and convening powers to foster a vibrant set of locations across Melbourne – linked to the existing nodes of our knowledge system – to foster greater connection between research, industry and community. Through anchoring innovation in connected virtual and digital precincts throughout the City, this approach will increase the intensity of the mixing and matching of talent, technology, disciplines and community, generating greater applied, practical research, IP and innovation in areas central to the City's reactivation and recovery.

##### What's next

- Develop a partnered activation plan for key innovation precincts in Melbourne's recovery, including the Melbourne Innovation District, CBD North, Parkville, Docklands and Fishermans Bend

#### 5. Catalysing the *public* knowledge system: greener, more open, more connected, more vibrant Melbourne

Harnessing City processes to finalise a set of high impact new open green spaces, creating more sustainable and inclusive public locations across Melbourne's knowledge system and broader community, positioning the city as a healthy, safe and welcoming destination for students, their parents and communities. Fostering a more porous and open knowledge system focused on liveability and thriving; based around students' immediate needs (food), social interactions and the City's assets.

##### What's next

- Determine a list of open spaces to green, with reference to the Sub-Committee suggestions included in Appendix C
- Develop a plan for rejuvenation, ensuring readiness to welcome students back to Melbourne and opportunities for student involvement



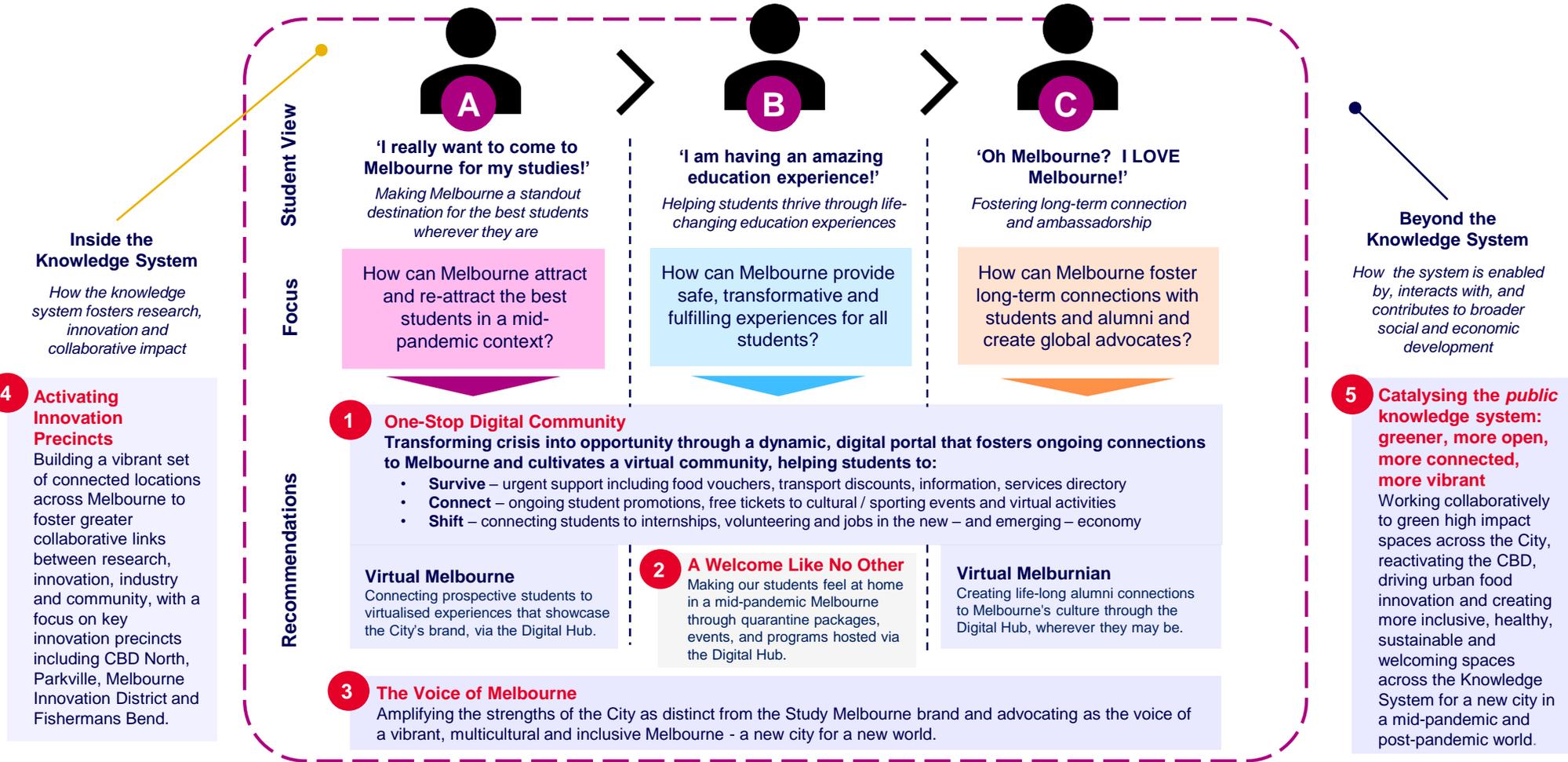
# **APPENDIX A**

## **Sub-Committee Framework**



# Knowledge City & International Education Framework

Sub-Committee ideas to redesign Melbourne's knowledge system, fostering new opportunities to support transformational experiences and create a thriving knowledge city for a mid-pandemic and post-pandemic world.





# APPENDIX B

## Supporting Data – Student Surveys



## Student Surveys

The Recommendations put forward by this Sub-Committee have been validated against student feedback to verify emerging directions and ensure City resources are focused where they will have the most impact across the knowledge system.

### City of Melbourne Social Indicators Survey – May 2020

The City of Melbourne's annual Social Indicator Survey revealed the **disproportionate impact of the first COVID-19 lockdown on international students**, with overall life satisfaction dropping nearly five times the rate of local students and food insecurity also skyrocketing in comparison.

This data confirmed the Sub-Committee's collective concern for the wellbeing of international students studying in the City of Melbourne at this time and reinforced the need for more responsive support systems and resources across the City's knowledge system.

### Knowledge City & International Education Sub-Committee Surveys

To verify the direction of the emerging ideas and recommendations, the members of this **Sub-Committee conducted three surveys through their networks:**

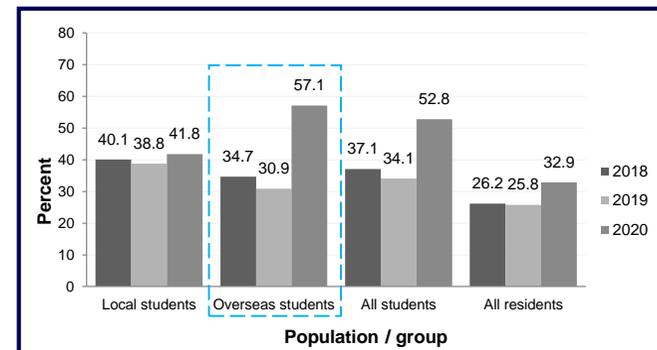
- Prospective Student Survey
- Current Student Survey
- Alumni Survey

The results of these surveys have been included in the following slides. The emerging insights were fed directly into the Sub-Committee's recommendations, to ensure the City of Melbourne can influence the Melbourne student journey in a meaningful way and support the knowledge system to thrive in a mid-pandemic city.

### CoM Social Indicators Survey May 2020

	All Australians on average 77.6% satisfied (2019)
	Residents 69.5%, ↓ 5% from 2019
	Students 62.7%, ↓ 7% from 2019
	Local students 64.4%, ↓ 2.5% from 2019
	Overseas students 61.2%, ↓ 12% from 2019

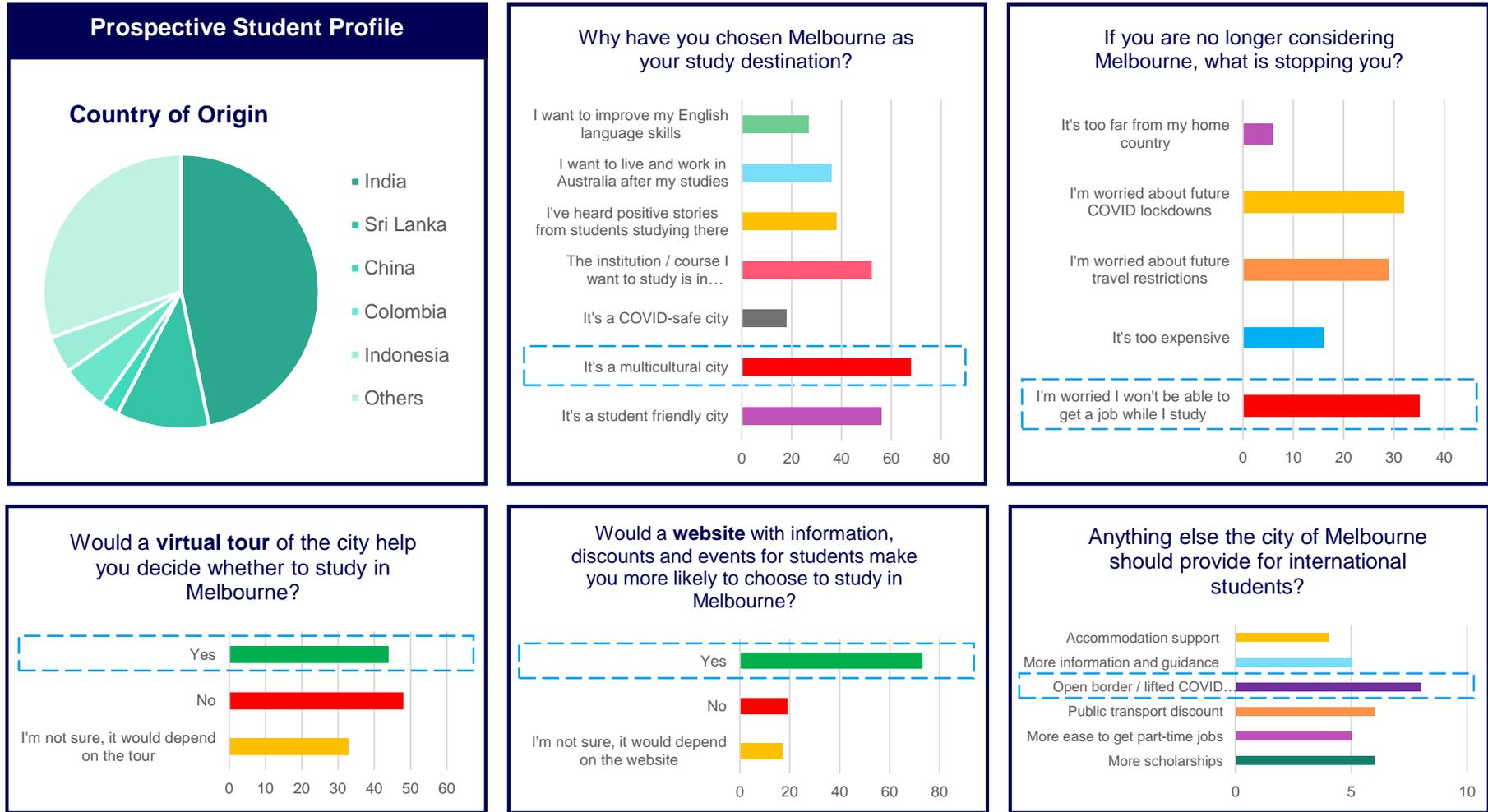
- Melbourne Wellbeing Index – Satisfaction with Life Overall



- Student Food Insecurity

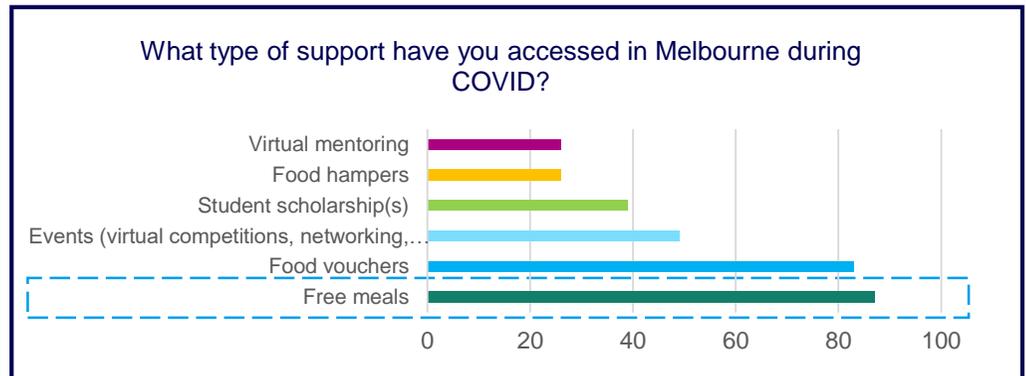
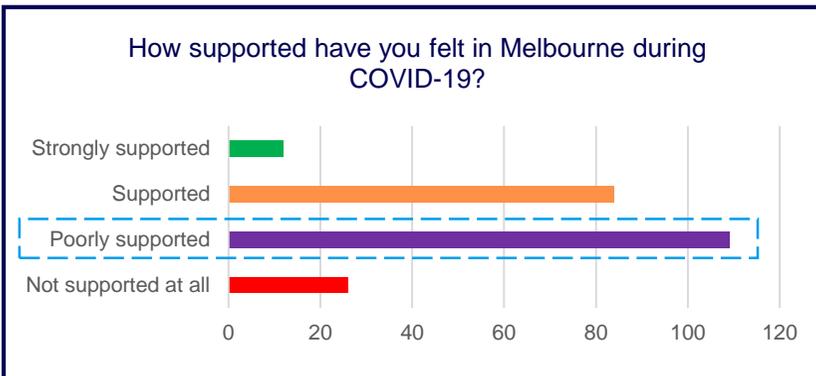
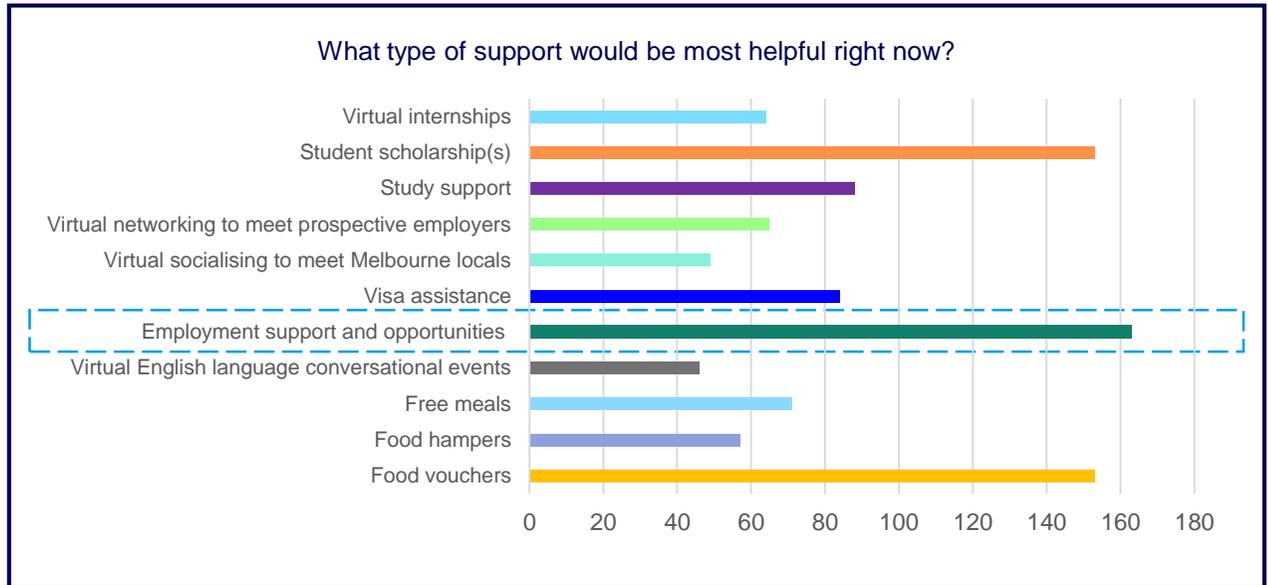
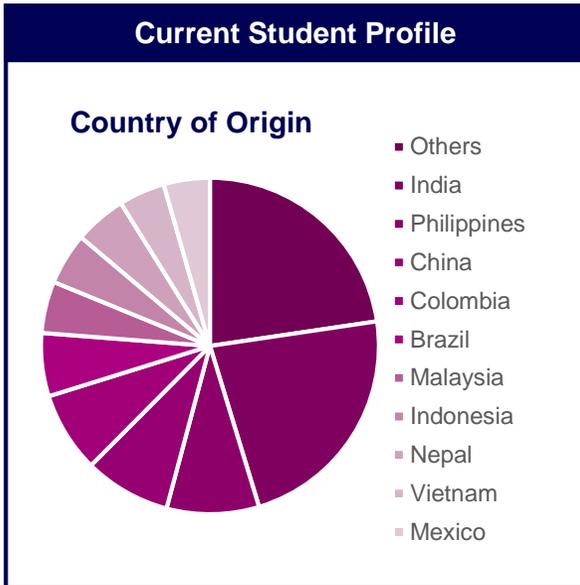
# Prospective Student Voice

Perspectives collected by this Sub-Committee from prospective students to identify key motivations for studying in Melbourne.



# Current Student Voice

Perspectives collected by this Sub-Committee from current students to identify key student wants and needs during COVID-19.



# Alumni Voice

Perspectives collected by this Sub-Committee from Melbourne alumni to identify study motivations, ambassadorship and connection.

## What was your favourite thing about studying in Melbourne?

“Everything... the people, culture and even the weather ”

“Pace of life, many fellow countrymates, good food, culture”

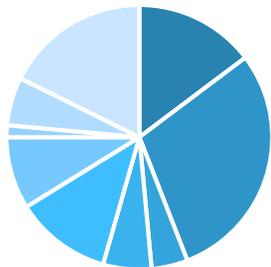
“Simple yet lively way of life”

“Accessible public transport, multicultural city, friendly people, great quality education”

“It opened up a whole new world of possibilities”

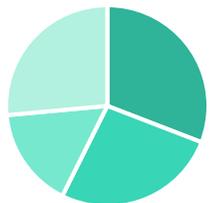
## Alumni Profile

### Country of Origin



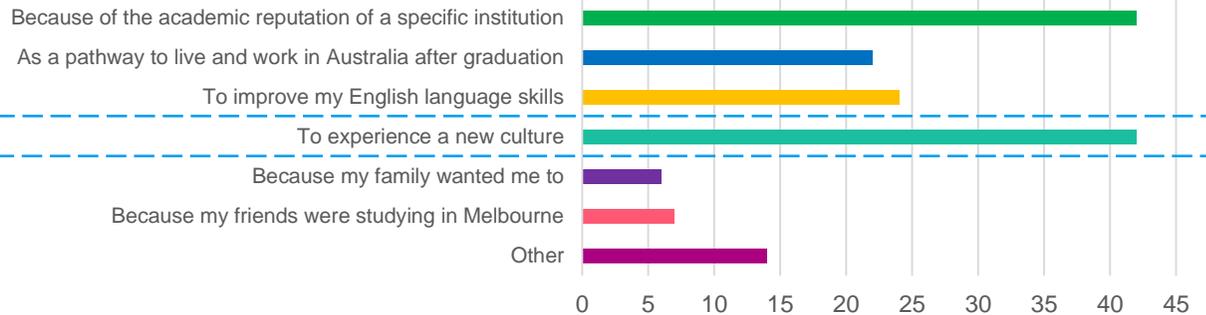
- India
- China
- Singapore
- Vietnam
- Malaysia
- Indonesia
- Hong Kong
- Saudi Arabia
- Other

### Graduation Year

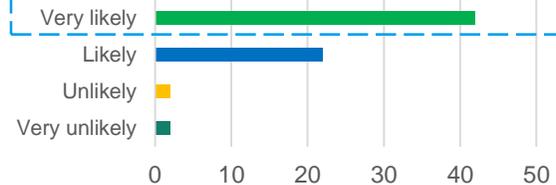


- 2019
- 2018
- 2017
- Other

## Why did you decide to study in Melbourne?



## How likely would you be to recommend Melbourne as a study destination to friends or family in your home country?



## How connected to Melbourne do you feel?

