MAPPING AUSTRALIAN HIGHER EDUCATION 2023

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AUTHORSHIP, ACKNOWLEDGMENTS AND DISCLAIMER

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OVERVIEW: SETTING THE SCENE

The early 2020s were tumultuous for Australian higher education. COVID-19 restrictions forced classes online and cut international student numbers. The former government's Job-ready Graduates policy radically changed domestic student funding. It slashed tuition charges for some students but more than doubled them for others.

With fewer international students, total higher education enrolments fell between 2020 and 2021, ending a growth run that began in 1954. Total enrolments in 2021, including domestic and international students, were just over 1.6 million.

Due to forced online study, a minority of domestic enrolments were enrolled as on-campus students in 2021, the first time this has happened. Student satisfaction with the social aspects of university life declined, but satisfaction with teaching quality was less affected. Attrition and subject fail rates fell for students who started university in 2020.

Student surveys and university detection reveal high levels of academic misconduct. In the early 2020s, regulators and universities increased their focus on academic integrity. Contract cheating services were banned but artificial intelligence creates new enforcement problems.

Universities rely heavily on casual and fixed-term contract staff. University employment practices are a key issue of the 2020s, attracting criticism from staff, politicians and workplace regulators.

Low job security helped universities reduce costs after losing international student fee revenue. Staff numbers fell sharply between 2020 and 2021 before starting to recover in 2022.

Until 2020, the 21st century was going well for universities. Research boomed, with huge increases in resources and outputs. Profits on international students were essential to this growth. Reduced profits and fewer staff may end the boom, but at least until 2022 the annual number of research publications with Australian authors continued to increase.

Opportunities for young Australians to get a university education have increased significantly. At the start of the century, less than 30 per cent of late-teenage Australians were at university; in 2020 that figure was over 40 per cent.

Rapid enrolment growth led to significant increases in higher education student debt, with outstanding balances doubling to $67.7 billion between 2014 and 2022. Repayments were slowed by poor graduate employment outcomes in the mid-2010s. Graduate employment rates and salaries have since improved, with student debt repayments doubling between 2016-17 and 2021-22.

In 2023, a major higher education policy review, the Universities Accord, is underway. Its terms of reference include most of the participation, funding and regulatory issues covered in *Mapping Australian higher education 2023*.

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INTRODUCTION

Mapping Australian higher education 2023 **provides an overview of higher education policy and trends. It is the sixth edition of a series previously published by the Grattan Institute.**

Since the last edition of *Mapping Australian higher education* in 2018, all chapters have been updated and new or expanded sections added on work-integrated learning, student finances, student mental health and international student migration.

Chapter 1 explains **how higher education is defined** in Australia, the different types of higher education provider, the various types of qualification, and what makes universities distinctive among higher education providers.

Chapter 2 reports on **student trends,** including enrolment numbers, courses chosen, and the social background of students. It also discusses how students enter the higher education system.

Chapter 3 examines the **student experience**, including subject pass rates, attrition, satisfaction with teaching, working while studying and mental health.

Chapter 4 looks at the **university workforce**, including why people become academics and their employment arrangements.

Chapter 5 looks at **research in Australian universities**, including what topics are researched and research outputs.

Chapter 6 provides information on **how higher education is funded**, including total revenue, the HELP student loan scheme, government grants for teaching and research, and international student fees.

Chapter 7 outlines how **per student funding levels** are determined, and **how student places are distributed** among higher education providers.

Chapter 8 describes how **the Australian Government came to dominate higher education policy**, the key government departments and the higher education interest groups.

Chapter 9 examines **higher education's benefits to the public and employers**, including whether higher education graduates meet skills needs, the quality of university research, and public satisfaction with Australian universities.

Chapter 10 reports on **higher education's private benefits** including graduate employment and income and, for international students, migration to Australia.

A **glossary** defines key terms.

Lists of **higher education providers registered in mid-2023** are provided in Appendix A and Appendix B.

1

HIGHER EDUCATION PROVIDERS

1 HIGHER EDUCATION PROVIDERS

What is a higher education provider? This chapter highlights the legal importance of awarding qualifications and describes the activities of universities, non-university higher education providers, and other organisations in the higher education industry.

1.1 Registered higher education institutions

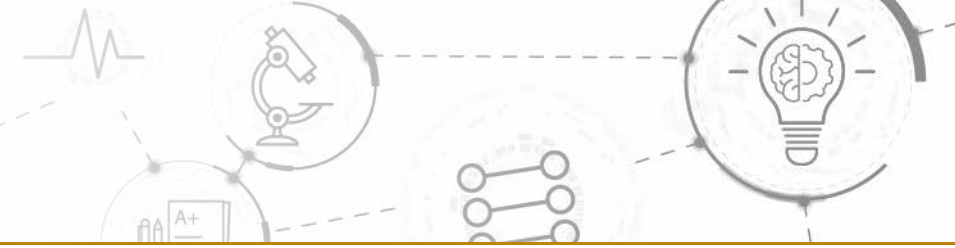
For many people in Australia, 'higher education' and 'universities' are synonyms. Universities are, however, a particular kind of higher education institution. The 42 Australian universities are a minority of the 198 institutions registered to offer higher education courses in mid-2023, including an overseas university winding down its Australian branch.[1] The most important distinguishing feature of universities is research. Universities also differ from other higher education providers in their range of activities and, in most cases, their scale. The characteristics of Australian universities are discussed in section 1.3.

Of the other higher education institutions, 149 are in the legal category of 'institute of higher education' and six are in the legal category of 'university college'.[2] The trading names of these 155 institutions typically include the words college, academy, institute or school. They are known collectively as NUHEPs (non-university higher education providers), NUHEIs (non-university higher education institutions), or by their industry organisations as 'independent' providers (section 8.3.2).

All higher education institutions must meet legal requirements. Every registered higher education institution must offer teaching and learning that engages with advanced knowledge and inquiry, employ academic staff who are active in scholarship, support freedom of speech and academic freedom, meet management and governance standards, and issue qualifications that comply with the Australian Qualifications Framework (AQF). The regulator is the Tertiary Education Quality and Standards Agency (TEQSA is discussed in section 8.2.2).

1 Tertiary Education Quality and Standards Agency (TEQSA) national register last checked 5 June 2023. Appendix A and Appendix B list all higher education providers. Carnegie Mellon University is the 'overseas university'. Overseas universities are registered based on the approval of their home country's regulator.

2 Despite having 'university' in their title, university colleges are not required to conduct research. Before 2021, a university college needed to meet similar requirements to the 'Australian university' category and have a plan to fully meet them within five years. Now being a mature 'institute of higher education' with a good track record is sufficient, although higher education providers can still use the university college category as a step towards university status. See the *Higher Education Standards Framework (Threshold Standards) 2021*.



Most legal criteria to be a registered higher education provider do not reliably distinguish them from other organisations that produce and disseminate advanced knowledge. What makes higher education providers legally distinctive is their licence to issue AQF-recognised higher education qualifications.

1.1.1 Qualifications

AQF qualifications are ranked according to the knowledge and skills required for their successful completion. They cover vocational and higher education, which together are known as tertiary education. Key differences between AQF qualification ranks include the level of theoretical knowledge required, and the student's capacity to analyse information, make independent judgements and devise solutions to problems. The AQF encourages pathways between the qualifications, including awarding academic credit for previous study.

Table 1 shows the current AQF qualifications, ranked from 1 to 10. Generally, certificates I to IV (levels 1 to 4) are classified as vocational, while associate degrees through to doctoral degrees (levels 6 to 10) are classified as higher education. Level 5 diplomas and level 6 advanced diplomas can be vocational or higher education, though most diploma enrolments are in the vocational education sector.

Undergraduate certificates are not located at a specific AQF level and can contain subjects between levels 5 and 7. These certificates were temporarily added to the AQF as part of the Australian Government's response to the COVID-19 pandemic. Following a 2019 review further AQF changes are possible, but a decision has been delayed.[3]

Higher education providers and other organisations can offer non-AQF courses if student achievement is recognised in ways that are distinct from AQF qualifications.[4] The two categories can blur. Short courses leading to 'microcredentials' are not in the AQF, but education providers may count subjects taken in microcredentials towards an AQF qualification.

Higher education AQF qualification levels are often grouped together for policy or analytical purposes. 'Sub-bachelor courses' usually refers to undergraduate certificates, higher education diplomas and associate degrees. Preparatory 'enabling' courses are not in the AQF but were historically classed as sub-bachelor for funding purposes (funding is discussed in chapters 6 and 7). 'Undergraduate courses' usually mean the sub-bachelor AQF courses plus bachelor degrees, including honours. 'Postgraduate courses' refer to all courses at graduate certificate level or above, with distinctions also made between 'postgraduate coursework' and 'postgraduate research', with most doctorates and some masters degrees in the second category.

3 P. Noonan, *Review of the Australian Qualifications Framework: final report 2019* (Department of Education, 2019).

4 The definition of the 'higher education award' in the *Tertiary Education Quality and Standards Agency Act 2011* includes an 'award of a similar kind, or represented as being of a similar kind' to the AQF qualifications.

Table 1: Australian Qualifications Framework

Level	Qualification
1	Certificate I
2	Certificate II
3	Certificate III
4	Certificate IV
5	Diploma
6	Advanced Diploma; Associate Degree
7	Bachelor Degree
8	Bachelor Honours Degree; Graduate Certificate; Graduate Diploma
9	Masters Degree
10	Doctoral Degree
	Undergraduate Certificate*

Source: Australian Qualifications Framework 2013.
** Not located at a specific AQF level but can include units at levels 5, 6 or 7.*

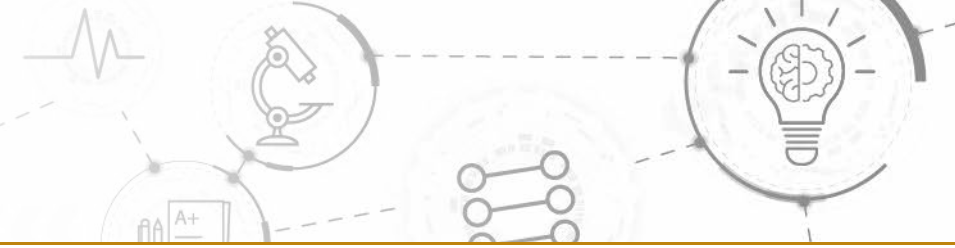
1.1.2 Courses

All higher education courses must meet legal standards set by the Australian Government and enforced by TEQSA.[5] The accreditation process includes examining course content, student admission criteria, assessment methods, and staff qualifications. Some higher education providers are self-accrediting, meaning they hold a legal right to approve their own courses. Universities self-accredit all their courses (section 1.3.3). Institutes of higher education with appropriate quality assurance systems and a re-accreditation track record can be granted self-accreditation powers. TEQSA can limit this power to specified fields of education and qualification levels. To be a 'university college' a provider must self-accredit at least 70 per cent of its courses.

In mid-2023, 57 providers self-accredited all or some of their courses, including the universities, the overseas university, the university colleges and eight institutes of higher education.[6] Courses taught by the other 141 NUHEPs are individually accredited by TEQSA.

5 *Higher Education Standards Framework (Threshold Standards) 2021.*

6 These are identified in Appendix A.



1.1.3 Vocational education

Vocational and higher education providers overlap. Public sector vocational education providers, the TAFEs, have added higher education qualifications to their course programs; nine TAFEs currently offer both vocational and higher education qualifications. Fifteen universities also offer vocational qualifications, including six 'dual sector' universities operating as TAFEs as well as higher education providers.[7] Apart from the TAFEs, 42 other NUHEPs offer both higher education and vocational education courses.[8]

1.2 Non-university higher education providers

The number of NUHEPs, including the university colleges, has grown over time. A 1999 study identified 89 NUHEP providers.[9] The total number reached 137 by 2011 and 155 by mid-2023.[10]

Although registered provider numbers have expanded over the past 24 years, neither the provider count nor the trend are straightforward. Some providers use multiple trading names, so the market includes more than 155 brands. But separately registered providers have common owners. For example, the Navitas company owns or partly owns 11 providers. Some NUHEPs, such as Monash College, are university subsidiaries. The long-term increase in total provider numbers conceals significant turnover, including closures, takeovers, conversion to university status and returns to teaching vocational education courses only.

NUHEPs are mostly privately owned, but 15 are public sector institutions, including the nine TAFEs offering degrees, three used by public sector agencies to train their own staff, and three arts-related providers, of which the National Institute of Dramatic Art (NIDA) is the best known. Three colleges set up by public universities to recruit international students are hard to classify on a public–private spectrum, as their main purpose is commercial.

Private NUHEPs are a mix of not-for-profit and for-profit providers. While an exact count is not available, as of August 2022 41 NUHEPs were registered charities with the Australian Charities and Not-for-profits Commission (ACNC).[11]

7 The dual sector universities are RMIT University, Swinburne University, Victoria University, Federation University, CQUniversity and Charles Darwin University.

8 Vocational and higher education providers also have common owners but the task of identifying ultimate ownership for all providers was too large for this report.

9 Calculated from L. Watson, *Survey of private providers in Australian higher education, 1999* (Department of Education, Training and Youth Affairs, 2000), pp. 23–25.

10 A. Norton, *Mapping Australian higher education* (Grattan Institute, 2012), pp. 11–12 and TEQSA, National register of higher education providers (Tertiary Education Quality and Standards Agency, 2023), as at 5 June 2023.

11 ACNC, *ACNC charity register* (Australian Charities and Not-for-profits Commission, 2022). To be registered, higher education providers must have a charitable purpose in the public benefit. 'Advancing education' is a legislated charitable purpose: *Charities Act 2013*, division 2. Other NUHEPs may act as not-for-profits – using surpluses for their mission rather than paying them out to owners. All Australian universities except Torrens University are also registered charities.

Most NUHEPs are specialised compared to universities (discussed in section 1.3). Usually, teaching is the only major function of a NUHEP, with about a third offering vocational as well as higher education courses. Only seven offer research doctorates. Many NUHEPs offer only one or two of the six AQF higher education qualification levels, and only two deliver the full range from a diploma to a PhD.

Thirteen NUHEP pathway colleges specialise in diploma-level courses for students who are not yet academically prepared for a bachelor degree. The pathway diploma curriculum matches a course in a target university's first year, but teaching is in smaller classes with remedial assistance. For example, students who successfully complete Deakin College's Diploma of Business can enter the second year of Deakin University's Bachelor of Business.[12]

Fourteen of the 96 NUHEPs that reported enrolment data to the Department of Education in 2021 only had postgraduate students, often in courses serving specific occupations with professional admission or development courses.[13] For example, the College of Law offers entirely postgraduate courses as it prepares law graduates for practice or teaches lawyers additional specialist skills.

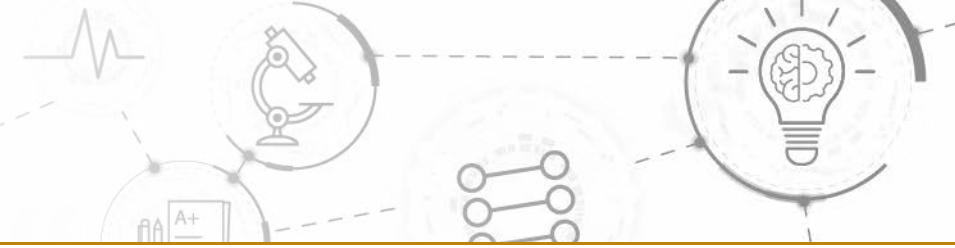
NUHEPs offer more courses in business than any other field, making up at least 35 per cent of their enrolments in 2021.[14] These include courses delivered by professional associations such as Chartered Accountants Australia and New Zealand.

Mental and physical health, including alternative health therapies, are common NUHEP specialities with 20 providers focusing on health-related courses. Sixteen NUHEPs have a religious affiliation, some including networks of affiliated colleges without separate TEQSA registration. This group includes theological colleges and providers offering a wider range of courses. Another 13 providers specialise in various kinds of creative arts.

12 Seven more universities have pathway colleges that operate as part of the university and are not separately registered by TEQSA. A small number of other providers act as pathway colleges for multiple larger providers.

13 NUHEPs are only reported in the annual Department of Education statistics if they receive HELP loans on behalf of their students. See section 6.3.1 for how this occurs, and Appendix A for a current list of providers with HELP loans. Calculated from DofE, *Students: Selected higher education statistics 2021* (Department of Education, 2023), table 13.2.

14 On a full-time-equivalent basis (see glossary). Ibid., table 13.1. The true share is higher given that colleges offering business courses primarily to international students are not in this data collection



About four-in-ten NUHEPs focus primarily on the international student market. As of mid-2023, 39 providers were registered to provide courses to international students but not to provide government financial assistance to domestic students, suggesting little local demand.[15] A further 22 providers that offer this assistance reported 80 per cent or more of their enrolments in 2021 were from overseas.[16] But 26 NUHEPs take domestic students only.[17]

Exactly how many students are taught in NUHEPs is not known. When universities outsource teaching to NUHEPs (section 1.4) the students are counted as enrolled in the university. Around 50 NUHEPs were not included in the 2021 Department of Education data release, which includes only providers receiving government financial assistance.[18]

With these significant caveats, in 2021 NUHEPs enrolled 118,775 students, 7.4 per cent of all students in the reported enrolment data (section 2.2). Their enrolment share is larger for international (11.7 per cent) than domestic (5.8 per cent) students. During the COVID-19 period, NUHEPs lost international enrolments but slightly increased their domestic enrolment share from 5.5 per cent.

The small NUHEP share of total enrolments reflects their focus on niche markets, their limited geographic reach (with most located in or near central business districts), the strong brands of the public universities, and that tuition subsidies for domestic undergraduate and some postgraduate students make public universities cheaper (see chapter 7).

15 To take international students, higher education providers must be registered on the Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS). See section 6.3.1 for domestic student support. One NUHEP meeting these criteria was removed from the total as it provides employer-funded education for domestic students.

16 On a full-time-equivalent basis. DofE, *Students: Selected higher education statistics 2021*, calculated from table 13.9.

17 The 26 are not registered on CRICOS. A further four recently registered providers are not on CRICOS as of 5 June 2023 but are approved to offer business and IT courses, which are often aimed at international students (section 2.4.4).

18 Appendix B lists providers not receiving FEE-HELP and not included in the published enrolment data. However, since 2021 additional providers have become FEE-HELP eligible and new providers have been established.

1.3 What is distinctive about universities?

'University' is a regulated term in Australia. To be an 'Australian university' an educational organisation must meet criteria set out in law.[19] The word 'university' in the titles of other organisations is also regulated.[20]

1.3.1 Research

The most important distinctive aspect of universities as higher education institutions is their combination of research and teaching. Research is original work conducted to produce new knowledge.[21]

Universities aspire to a teaching–research nexus: the idea that teaching and research are mutually beneficial, not just two separate functions of the same institution. Student satisfaction with teaching and research output both increased over the past 20 years (sections 3.3 and 5.4), which might suggest a synergy. Profits from teaching finance research (section 6.7.2). But metrics of teaching performance and research quality are not closely linked.[22]

A specialist university can combine teaching and research in one or two broad fields: disciplines such as health, engineering, education or science.[23] The University of Divinity is the only specialist university. Other universities must be active in teaching and research across at least three broad fields of education. In 2021, new research quantity and quality requirements came into effect. Australian universities must conduct research meeting quality thresholds in at least 30 per cent and later at least 50 per cent of the broad fields of education in which they teach. To meet the two new benchmarks, universities have five- and 10-year grace periods, respectively.[24]

19 *Higher Education Standards Framework (Threshold Standards) 2021*. There are different rules for 'overseas universities' and as noted in footnote 2 'university colleges'. Universities are listed in Appendix A. Most universities have their own legislation, usually enacted by a state government.

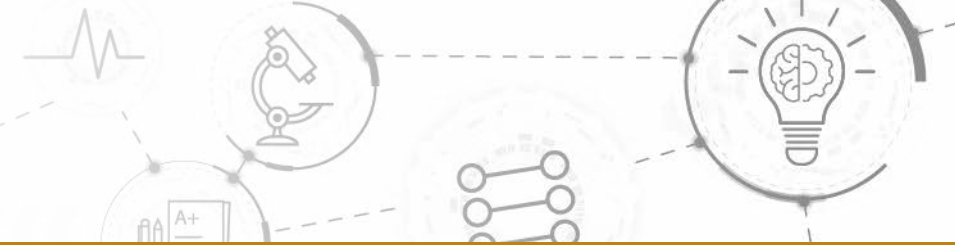
20 Under the *Business Names Registration Act 2011*. Permission to use the world 'university' without TEQSA registration will be granted where the organisation is clearly not offering higher education, for example 'University Café'.

21 For regulatory research definitions see TEQSA, *Guidance note: research and research training (version 2.0)* (Tertiary Education Quality and Standards Agency, 2022).

22 See I. Cherastidtham, J. Sonnemann and A. Norton, *The teaching-research nexus in higher education: Background paper supporting the Taking university teaching seriously report* (Grattan Institute, 2013) and the summary and references at A. Norton and I. Cherastidtham, *The cash nexus: how teaching funds research in Australian universities* (Grattan Institute, 2015), pp. 31–33.

23 Detailed fields of education can be found in ABS, *Australian standard classification of education (ASCED)* (Australian Bureau of Statistics, 2001) and detailed fields of research in ABS, *Australia and New Zealand standard research classification* (Australian Bureau of Statistics, 2020). TEQSA has produced a concordance table to help providers match their teaching and research activity. See TEQSA, *Guidance note: research requirements for Australian universities* (Tertiary Education Quality and Standards Agency, 2023), Attachment A.

24 *Higher Education Standards Framework (Threshold Standards) 2021,* B1.3 and B3. The deadlines for these grace periods are 1 July 2026 and 1 July 2031.



While the idea that universities must conduct research is now widely accepted, the original mid-19th century Australian universities were places of scholarship, more focused on seeking than creating knowledge. Research played a larger role from the late 19th century, but PhD degrees were not offered until the 1940s.[25]

In the late 1980s and early 1990s, teaching-focused colleges of advanced education and other government-funded higher education institutions were turned into or merged with universities, substantially diluting the university sector's research orientation. These universities are still sometimes referred to as 'Dawkins universities' (after the minister behind the policy, John Dawkins).[26] Yet only 10 years later research became a defining legal feature of a university, with a nationally consistent requirement that research degrees be offered in at least three fields of education from 2007.[27]

The research requirement limits scope for new universities. Unlike teaching, research is typically not self-financing. Funding from the public research grant programs is largely restricted to existing universities (section 6.3.1) and primarily awarded according to past research performance (section 6.7.1), making it difficult to build research capacity.

Only three institutions have become universities after the 2000 introduction of national research rules: the University of Divinity, Torrens University Australia and Avondale University. All are private universities. New public universities were created in every decade from the 1940s to the 1990s but none so far in the 21st century.

1.3.2 Comprehensive

While many institutes and university colleges specialise in what they teach (section 1.2), Australian universities are often described as 'comprehensive' in their range of courses. Of the 41 non-specialist universities, 25 enrol students in all 10 major broad fields of education, and another 10 teach students in nine fields.[28]

25 Starting with the University of Melbourne: G. Croucher and J. Waghorne, *Australian universities: a history of common cause* (UNSW Press, 2020), pp. 71–72.

26 For a history see S. Macintyre, A. Brett and G. Croucher, *No end of a lesson: Australia's unified national system of higher education* (Melbourne University Press, 2017).

27 Based on agreements between state and Commonwealth education ministers through the Ministerial Council on Education, Employment, Training and Youth Affairs (MCTEEYA). The *National Protocols for higher education approval processes* were introduced in 2000 and revised in 2007. In this period the Commonwealth lacked direct power to regulate higher education: see section 8.1 The protocols were replaced with an earlier version of the *Higher Education Standards Framework (Threshold Standards) 2021* in 2012.

28 Calculated from DofE, *Students: Selected higher education statistics 2021*, table 2.8. Enrolments categorised as '<5' were coded to zero as being unlikely to signal ongoing courses.

The wide range of courses public universities offer is one reason why they are large, ranging from 12,327 to 87,098 students in 2021, with an average of 38,250 (see section 2.5 for enrolment by university).[29] With no new public universities, the 21st century growth in student numbers described in section 2.2 was largely in institutions that existed before it began.[30]

While many students specialise in their university studies, the comprehensive nature of Australian universities supports studying more than one field. Australian universities offer combined courses, such as arts/law and commerce/science, with graduates earning two qualifications. Students also take subjects from more than one area within the same degree. For example, an arts student may do a mathematics subject taught by a science faculty.

Comprehensiveness extends to qualifications offered. All universities offer courses from bachelor through to PhD. Some also offer diploma, associate degree and vocational education qualifications.

29 Calculated from DofE, *Student enrolment pivot table* (Department of Education, 2023).

30 See G. Davis, 'Why are Australian universities so large?', in *Australian universities: a conversation about public good*, ed. J. Horne and M.A.M Thomas (Sydney University Press, 2022).

1.3.3 Self-accreditation

Unlike other higher education institutions, Australian universities accredit all their own courses.[31] University academic boards perform this role.[32] Self-accreditation is an aspect of academic freedom (section 1.3.4). In developing courses, academics in self-accrediting universities can include material without seeking a government agency's approval. They are instead regulated by their fellow academics.[33]

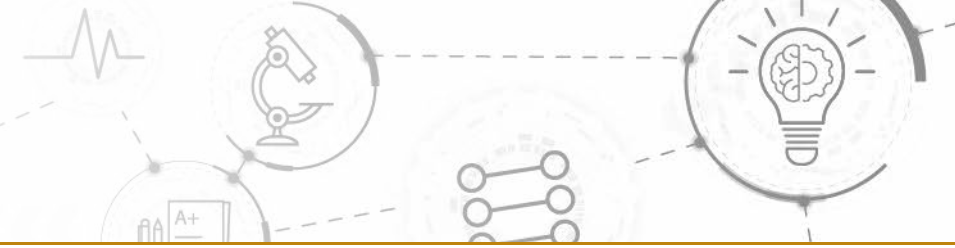
While universities self-accredit, they also seek external accreditation or recognition, including from international organisations. Often this is necessary for their graduates to enter professional practice. As of 2017, about 100 accrediting agencies or professional bodies set requirements for university courses.[34]

31 TEQSA can impose a condition on registration that limits this power: *Tertiary Education and Quality Standards Act 2011*, section 45.

32 At universities, the academic board itself is usually established or required under the university's founding legislation. The role of academic boards is discussed in A. Dooley, P. Wormell and P. McCallum, *The purpose and function of academic boards and senates in Australian universities* (National Conference of Chairs of Academic Boards, 2013). Courses must meet requirements set out in the *Higher Education Standards Framework (Threshold Standards) 2021*.

33 In practice the role and power of academic boards varies between universities, with central administrations also playing a role: see J. Rowlands, *Academic governance in the contemporary university* (Springer, 2017).

34 PhillipsKPA, *Professional accreditation: mapping the territory* (PhillipsKPA/Department of Education and Training, 2017), Appendix 1.



1.3.4 Academic freedom

The institutional autonomy of self-accreditation has its individual equivalent in academic freedom. As one American study put it, 'academic freedom establishes the liberty necessary to advance knowledge, which is the liberty to practise the scholarly profession'.[35] This includes freedom from government, from other external funders and, in more complex ways, from university managers. Freedom to pursue their own research interests attracts academics to universities.[36] Academic freedom enjoys strong public support.[37]

In 2021, 'academic freedom' was defined in higher education legislation. It includes the freedom of academic staff to teach, research, disseminate that research, and express their views on subjects related to their study and research.[38] All higher education providers, whether universities or not, must maintain an institutional environment that upholds and protects academic freedom.[39] Low levels of NUHEP research activity make this mainly an issue for universities. With some minor exceptions, universities but not NUHEPs must have a policy on academic freedom as a condition of Commonwealth funding.[40]

These legal requirements do not directly create enforceable rights for academics. University academic freedom policies may provide complaint processes, moving cases up but not outside the university's hierarchy. If a university academic freedom case revealed systemic issues, TEQSA could investigate a breach of the relevant standards. TEQSA is not, however, a complaints body and cannot reverse university decisions in specific instances.

35 M. W. Finkin and R. Post, *For the common good: principles of American academic freedom* (Yale University Press, 2009), p. 39.

36 E. Bexley, R. James and S. Arkoudis, *The Australian academic profession in transition* (Melbourne Centre for the Study of Higher Education, 2011), p. 66.

37 N. Biddle and K. Reddy, *Universities in Australia: attitudes and challenges ANU Poll Report No. 29* (ANU Centre for Social Research and Methods, 2019).

38 See the definition in the 'Dictionary' of the *Higher Education Support Act 2003*.

39 *Higher Education Standards Framework (Threshold Standards) 2021,* Part A 6.1(4).

40 *Higher Education Support Act 2003*, section 19-115. For reasons described in section 6.3.1 this rule does not apply to Avondale University until 2024 and does apply to the Batchelor Institute of Indigenous Tertiary Education but not other NUHEPs.

When disputes between universities and academics arise, enterprise agreements between the university and the National Tertiary Education Union are the most powerful documents.[41] In 2021, the High Court of Australia considered such a case, ***Ridd v James Cook University***. This case concerned a conflict between the 'intellectual freedom' protected by the university enterprise agreement and a university code of conduct. Although Ridd lost his case, the High Court decided that statements within an academic's field of competence do not need to afford 'respect and courtesy' to those being criticised, as required by the code of conduct.

Academic freedom creates high levels of work autonomy, but it is narrower than freedom of speech. It protects academics in their professional capacity, as members of the university and scholars in their field. This idea is reflected in both the academic freedom legislation and the High Court's ***Ridd*** judgment. Academic freedom does not inherently guarantee academics a broad personal freedom to comment on any matter. Universities nevertheless typically allow academics a public role outside their scholarly expertise, but sometimes discourage mention of their university affiliation.[42]

The university funding system influences how academic freedom works in practice. The major government funding programs for research projects (section 6.7.1) generally respect academic freedom, as academic experts assess applications from other academics – but a ministerial veto creates exceptions.[43] Research expenditure is biased towards medical and scientific disciplines and research with potential practical outcomes (section 5.3). Academics with other research priorities receive less financial support. In 2010, six in 10 academics agreed that they had freedom to pursue their research interests, but most lacked the necessary time and funding.[44]

Most people working in academic roles are on casual or fixed-term contracts (chapter 4). Casual staff are usually employed to teach a specific course with no pay for any other activity. Academics with fixed-term contracts are often hired for specific projects rather than self-directed research. Academics on short-term contracts have an incentive not to contradict or upset their current or prospective employers and colleagues. Self-censorship may affect academic freedom more than the administrative action, such as in the ***Ridd*** case, that triggers public controversy.

41 See R. French, *Report of the independent review of freedom of speech in Australian higher education providers* (Department of Education, 2019), esp. pp. 177–182.; C. Evans, A. Stone and J. Roberts, *Open Minds: Academic freedom and freedom of speech in Australia* (La Trobe University Press, 2021), pp. 55–58.

42 French, *Report of the independent review of freedom of speech in Australian higher education providers,* pp. 147–149, 157–158.

43 T. Brennan and H. Ferguson, *Independence of the Australian Research Council* (Parliamentary Library, Parliament of Australia, 2022).

44 E. Bexley, S. Arkoudis and R. James, 'The motivations, values and future plans of Australian academics,' *Higher Education* 65, no. 3 (2013), p. 391.

1.3.5 Self-governing communities

Universities see themselves as self-governing communities. Both public and private universities are legally distinct from government.[45] At public universities, government appointments to university governing bodies, commonly called councils or senates, are never a majority.[46] Private universities have no such appointments. Education ministers have no direct operational control. Partly for historical constitutional reasons, much Australian Government regulation is via conditions on grants (section 8.1), which universities can decline.

Within universities, academics see themselves as members of the university community and not just as employees.[47] The legal force of this distinction was explicitly acknowledged in a Federal Court judgment.[48] Academics expect to be involved in institutional decisions, part of a practice known as collegiality. Academics elect members to university senates and councils. The legal definition of academic freedom includes the right to express opinions on their university. Academic critiques of university administrators complain about 'managerialism' – managers directing academics or steering their behaviour through targets and incentives. Managerialism is seen as an ideological rival to collegiality.[49]

Non-academic staff have a more typical employer-employee relationships with their university. They are not covered by legal definitions of academic freedom. Most university governing bodies, however, include elected representatives of non-academic staff.[50]

45 On the corporate status of universities see S. Corcoran, 'First principles in the interpretation of university statutes,' *Flinders Journal of Law Reform* 4, no. 2 (2000) and J. Orr, 'Australian corporate universities and the Corporations Act,' *International Journal of Law and Education* 17, no. 2 (2012).

46 In research conducted in 2017 and 2018, eight per cent of members of university governing bodies were government appointed. Twenty-seven per cent were staff or student representatives. The largest group, 55 per cent, were appointed by the governing body itself: G. Croucher et al., 'Framing research into university governance and leadership: formative insights from a case study of Australian higher education,' *Educational Management, Administration and Leadership* 48, no. 2 (2020), pp. 255–259.

47 See the discussion in H. Forsyth, *A history of the modern Australian university* (NewSouth Publishing, 2014), especially chapters 7 & 8.

48 In *University of Western Australia v Gray* the court held that academic staff were, by virtue of the definition of 'university' in the UWA Act, members of a university, 'linked historically by that definition to the idea of the university as a community of teachers and scholars', see N. Stobbs, 'Academic freedom and university autonomy', in *Higher education and the law*, ed. S. Varnham, P. Kamvounias, and J. Squelch (The Federation Press, 2015).

49 University staff surveys show low confidence in university management: NTEU, *2017 state of the uni survey: report 1, overview* (National Tertiary Education Union, 2018).

50 Croucher et al., 'Framing research into university governance and leadership: formative insights from a case study of Australian higher education', pp. 255–259.

Students are also represented on most university governing bodies. The legal definition of academic freedom includes students expressing opinions on their higher education provider. Students have further statutory rights to be consulted, often through student associations officially recognised by the university.[51]

Student organisations are sometimes controversial due to their political activities and their funding source – a separate amenities fee students pay in addition to their tuition charges.[52] These controversies reflect debate about the scope of the university. Is it just a provider of education and research services, or is it something more to its staff and students?

1.3.6 Broad social responsibilities

Community engagement is sometimes called the third stream of university activity, after teaching and research. It can include universities working with or for local communities, government, industry, not-for-profits, and the media. The standards for registration as a university or university college now require engagement with its communities, employers, industry and the professions in its teaching areas, and a commitment to 'social responsibility'.[53] Research policy encourages universities to focus on practical problems or commercial opportunities (sections 5.3, 6.7.1, 9.4). University founding statutes, which are mostly state government legislation, also include community engagement objectives.

Community engagement is diverse and hard to measure. Academic time-use surveys provide an input indicator. The latest, from 2015, found that academics spent on average 5.3 hours a week on community and university service, out of an average 50.7 hours of work.[54] An earlier survey of academics found that more than half believed that community service should be rewarded in promotions, but only 15 per cent said that it was rewarded.[55] Although a distant third priority after research and teaching, community service is an important part of university culture and practice.

51 *Higher Education Support (Student services, amenities, representation and advocacy) Guidelines 2022*, part 3.

52 A compulsory fee for student services and amenities, a longstanding aspect of Australian higher education, was prohibited by the Liberal Howard government from 2006. A more limited fee, capped in total and with restrictions on its use, was restored by the Labor Gillard government from 2012. Students can pay the fee using a SA-HELP loan: section 6.4.2.

53 *Higher Education Standards Framework (Threshold Standards) 2021*, parts B1.2 and B1.3.

54 NTEU, *State of the Uni Survey 2015 Report No.2: Workloads* (National Tertiary Education Union, 2015). A 2007 survey, which excluded internal university service but included services to clients or patients as well as community service, reported 4.4 hours out of 50.6 hours a week: H. Coates et al., *The attractiveness of the Australian academic profession: A comparative analysis* (ACER, LH Martin Institute, Educational Policy Institute, 2009).

55 Bexley, James and Arkoudis, *The Australian academic profession in transition,* p. 25.

1.3.7 Multiple missions

Although the term 'university' has a formal legal definition, no single feature makes universities distinct as higher education providers. NUHEPs conduct research, self-accredit, respect academic freedom, operate as communities of scholars, and engage with broader social responsibilities. But few NUHEPs do all these things and most have limited functions beyond teaching. Public universities stand out in the system due to their scale and combination of activities rather than possessing any one distinctive feature.

1.4 Higher education service providers

Although only TEQSA-registered higher education providers can award higher education qualifications, other organisations support higher education providers or deliver related higher education services.

1.4.1 Recruitment

While universities actively recruit students, intermediary organisations help match students with courses and institutions. The most important domestic intermediaries are the state-based tertiary admissions centres, which match university applicants with offers (see section 2.1). In the international student market, education agents help match students with courses and assist with visas. In 2022, 86 per cent of international undergraduate students reported using agents.[56] Government and privately funded websites help students with course information such as entry requirements, fees, student satisfaction, and employment outcomes.[57]

Open Universities Australia (OUA) does not deliver education or award degrees. It sells online subjects and courses offered by its seven shareholder universities and other higher education providers. It is unusual in promoting not-for-degree subjects; selling knowledge without an AQF credential (students may apply to individual universities for credit towards a degree for OUA units).

56 SRC, *2022 Student Experience Survey: the international student experience* (Social Research Centre/Department of Education, 2023), p. 31.

57 Including the Good Universities Guide, CourseSeeker, COMPARED, and QILT.

1.4.2 Course delivery

Organisations such as Blackboard, Canvas and Moodle help universities coordinate teaching-related activities through software known as learning management systems (LMS). These systems store course content and are used to submit work, run student forums, record assessment results, and do other administrative tasks. Other programs promote academic integrity, such as Turnitin for detecting plagiarism and Proctorio for remote proctoring of exams.

Universities also outsource academic activities. Organisations known as online program managers (OPM) provide course development and delivery services for universities. As of April 2022, 14 OPMs worked with 33 Australian universities.[58] Navitas operates the 'La Trobe University Sydney' campus. Students study a La Trobe University curriculum and are awarded a La Trobe University degree. Queensland TAFE offers University of Canberra degrees. Similar 'third party' arrangements exist around Australia and at offshore campuses.[59]

1.4.3 Study assistance

Companies offering one-to-one online tutorial services for university students operate in the Australian market. An Australian tutorial service provider, Studiosity, works with 26 universities. Another firm in this market is Smarthinking, which is owned by the world's largest international educational services company, Pearson Education.

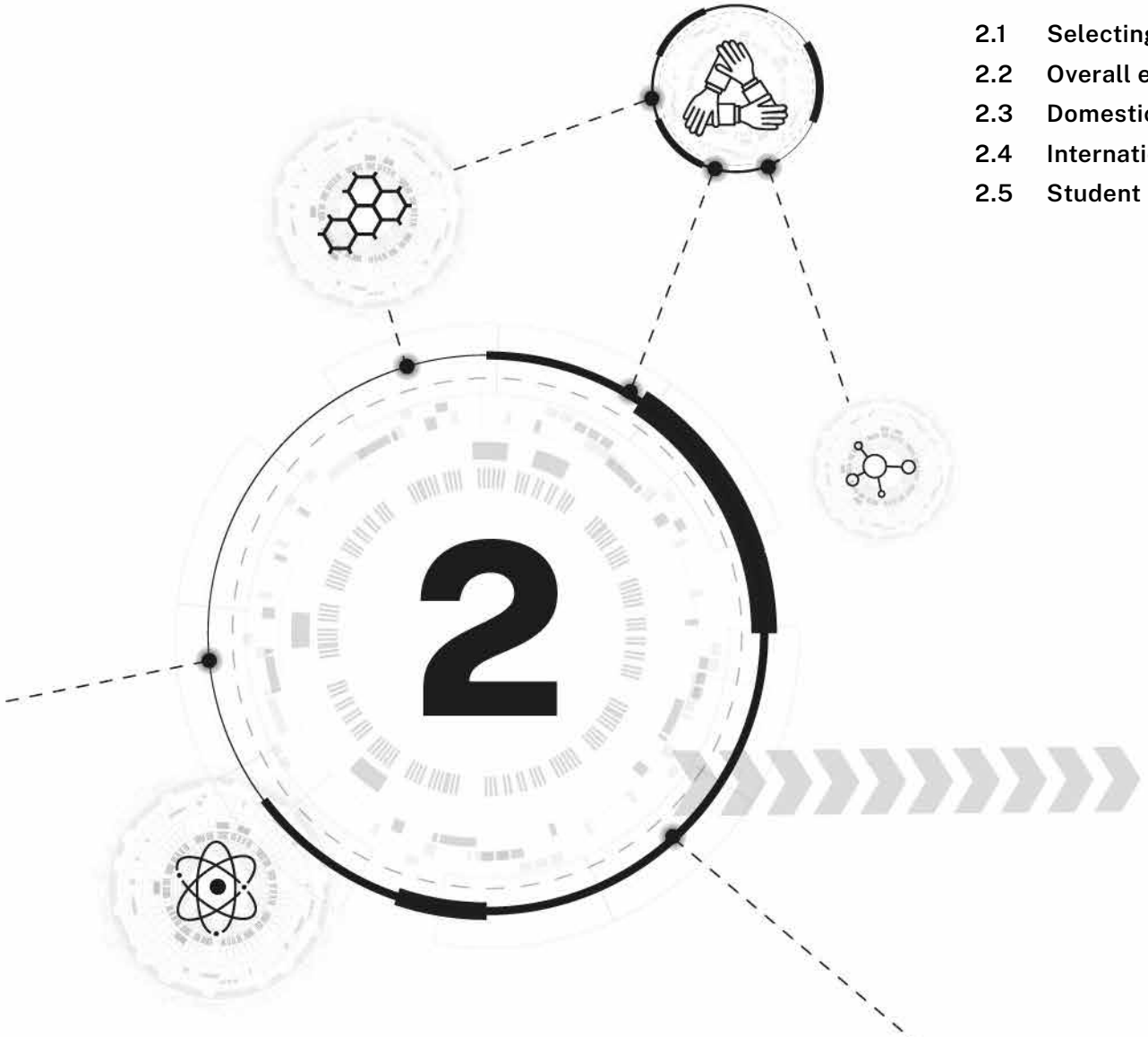
Regional university centres (RUC) provide a place to study for online students based outside the capital cities, offering high-speed internet, general academic support services, and pastoral care. In mid-2023, 32 RUCs were operating, with a further two expected to open in 2023. In July 2023 the government announced that RUCs would be rebranded as 'regional university study hubs' and complemented with 'suburban university student hubs' in the outer suburbs of major cities. [60]

58 M. Shah and F. Lim, 'The quality challenge in online learning partnerships', *Campus Morning Mail*, 15 November 2022.

59 For an overview of these arrangements at select universities see M. Brett et al., *Equity at and beyond the boundary of Australian universities* (La Trobe University/National Centre for Student Equity in Higher Education, 2019), pp. 24–35.

60 J. Clare, 'Australian Universities Accord Interim Report and immediate actions', *Ministers' media centre: Ministers of the Education Portfolio*, 19 July 2023.

STUDENT SELECTION AND ENROLMENTS



2 STUDENT SELECTION AND ENROLMENTS

This chapter examines how people enter higher education, how many domestic and international students are enrolled, and what they study. It also explores the social background of students.

2.1 Selecting students

Higher education is popular in Australia. For decades most upper-year school students in Australia have expressed an interest in going to university.[1] Parental expectations are also high.[2] Fifty-three per cent of Year 12 students applied for university in 2020.[3] More will apply in subsequent years after taking time off, vocational education or employment.

2.1.1 Selection criteria

Successful completion of Year 12 does not guarantee entry into a higher education institution. Legally, no higher education provider should accept applicants without the English proficiency and academic preparation needed for the course.[4] Students receiving Commonwealth tuition assistance must be selected based on merit, although educational disadvantage can be considered.[5]

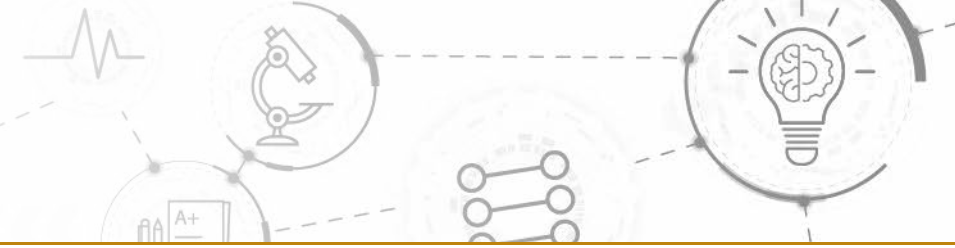
1 See the references in A. Norton, I. Cherastidtham and W. Mackey, *Mapping Australian higher education 2018* (Grattan Institute, 2018) p. 18, footnote 46. Also M. Yu and D. Warren, 'Shaping futures: school subject choice and enrolment in STEM', in *Growing up in Australia: the longitudinal study of Australian children: annual statistical report 2018*, ed. G. Daraganova and N. Joss (Australian Institute of Family Studies, 2019), p. 99.

2 R. Wikins et al., *The Household, Income and Labour Dynamics in Australia Survey: Selected findings from waves 1 to 20, the 17th annual statistical report of the HILDA survey* (Melbourne Institute of Applied Economic and Social Research, 2022), p. 130.

3 Calculated from DofE, *Student applications time series, PowerBI* (Department of Education, 2022) and ABS, *Schools* (Australian Bureau of Statistics, 2022).

4 *Higher Education Standards Framework (Threshold Standards) 2021*, Part A, section 1.1.

5 *Higher Education Support Act 2003*, section 19-35. This financial assistance is discussed in section 7.1.



For domestic students, English proficiency is usually assumed based on completion of Year 12 English or prior tertiary education in English (see section 2.4 for international students). Higher education institutions use a wide range of criteria to assess academic preparation. These include school results, grades in previous tertiary education courses, completion of prerequisite subjects, and course-specific aptitude tests. For engineering, IT, teaching, and health and medical science courses, mathematics prerequisite subjects are the most common.[6] The University Clinical Aptitude Test for Australia and New Zealand (UCAT ANZ) is used for undergraduate medical, dental and clinical science programs. Auditions or folios are often used for creative arts courses. Interviews are sometimes part of selection processes.

Non-academic criteria as general admission requirements are rare. The Australian National University, however, requires participation in 'co-curricular' activities such as sport, volunteering, creative arts or paid work.

Where the supply of student places is sufficient to meet demand, threshold requirements are sufficient for entry. Where demand exceeds supply, universities typically ration based on prior academic performance at school, in another tertiary course, or on an admission test.

Year 12 academic ranking systems assist student selection, with the Australian Tertiary Admission Rank (ATAR) introduced in all states except Queensland by 2010.[7] Queensland followed in 2020. ATAR creates a common metric for students who have taken different subjects.[8] Each year the ATAR ranks school leavers in their state and age cohort between 0 and 99.95. An ATAR of 80 means the student did better than 80 per cent of their state age cohort, including people who did not finish school. ATARs below 30 are reported to students as 'less than 30'.

The ATAR attracts critics but provides benefits for universities and applicants. It is a strong predictor of subsequent success at university, including marks received, subjects passed and course completion.[9] ATAR re-uses assessment already completed in the school system, reducing student selection cost and effort for applicants and higher providers compared to other admission criteria.

6 A. Finkel et al., *Mapping university prerequistes in Australia* (Office of the Chief Scientist/ Australian Mathematical Sciences Institute, 2020), chapter 3.

7 Formerly called ENTER in Victoria, UAI in NSW, and TER in other jurisdictions. Queensland had its Overall Position (OP) system.

8 For an example of how the ATAR is calculated see UAC, *Report on the scaling of the 2021 NSW Higher Education Certificate* (Universities Admissions Centre, 2022).

9 A. Manny, H. Tam and R. Lipka, *The effectiveness and limitations of the ATAR* (Universities Admissions Centre, 2019); I. Cherastidtham, A. Norton and W. Mackey, *University attrition: what helps and what hinders university completion?* (Grattan Institute, 2018), chapter 3.

Universities adapt ATARs by offering 'adjustment factors' (often known as 'bonus points') to applicants with target characteristics, such as membership of a disadvantaged group, living near the university, specific subjects taken in Year 12, or being an elite athlete or performer. Compared to using the original ATAR, adjustment factors lift the applicant's 'selection rank' relative to other applicants for the course. At a given original ATAR level, students from disadvantaged backgrounds tend to achieve slightly higher average marks in their first year than other students, suggesting that bonus points correct for ATAR under-ranking their university potential.[10]

In 2021, ATAR was used on its own or with other criteria for 70 per cent of recent school leaver students commencing bachelor degrees.[11] ATAR alternatives include academic results achieved prior to the completion of Year 12, school recommendations and general admission tests.

Older applicants can also use general admission tests, but most use their results in other tertiary education courses, including vocational education and previous higher education.

The Australian Government's CourseSeeker website includes selection criteria for each course on offer. In many cases it also quantifies how many students were admitted on different selection criteria, as well as the highest, median and lowest ATAR to receive an offer.

10 See A. Manny et al., *Data analysis: Student disadvantage and success at university* (Universities Admissions Centre, 2021) and its literature review at pp. 6–9.

11 Department of Education, special data request.

2.1.2 The admissions process

Most domestic applicants for undergraduate courses (251,915 in 2021) use a state-based tertiary admissions centre (TAC).[12] They list courses in preference order. In effect, applicants can simultaneously apply to multiple higher education providers and/or for multiple courses at the same provider. Applicants who miss out on their first preference course can receive an offer for a second or a lower preference course.

Increasing numbers of people apply directly to higher education providers, reaching 160,961 for undergraduate courses in 2021. Historically, older applicants apply directly more often than school leavers. Most postgraduate courses only use direct applications. A growing number of Year 12 students apply directly because they want early offers – offers made prior to the main TAC offer round in December each year. Students may need specified minimum school results to confirm their offer.[13]

Applicants can put in both TAC and direct applications, and so the unique number of individuals (341,983) who sought university entry in 2021 is less than the total of TAC and direct applications. Eighty-two per cent of applicants received an offer in 2021.[14]

12 DofE, *Student applications time series, PowerBI*.

13 For NSW early offer application trends see D. White and L. Carroll, 'Universities bypass ATARs as record numbers of students receive early offers', *The Sydney Morning Herald*, 13 September 2022.

14 DESE, *Undergraduate applications, offers and acceptances 2021* (Department of Education, Skills and Employment, 2021), table A10.

In 2021, 85 per cent of applicants receiving offers responded positively; 79 per cent accepted for 2021 and six per cent accepted but deferred commencement.[15] This deferral rate was lower than usual, probably because in early 2021 COVID-19 restrictions limited 'gap year' options such as paid work and travel.

Domestic applicants who accept an offer and enrol have more time to decide whether to proceed with a subject or course. An important decision point is the 'census date', which is usually about a month after teaching starts and must be at least 20 per cent of the way through a subject. Students who end their subject enrolment before the census date incur no charge. Pre-census date departures are not routinely reported, but on mid-2010s data about 10 per cent of the applicants who accepted an offer never reached a census date.[16]

In 2021, of those who remained enrolled past a census date, 45 per cent of commencing domestic bachelor-degree students had been admitted based on their secondary education. Other major admission categories were previous higher education (26 per cent), previous vocational education (13 per cent) and 'work and life experience' (12 per cent).[17]

In addition to the census date, some universities offer a later date to withdraw from a subject without a fail being recorded. This date is not regulated. Except in limited circumstances students who withdraw from subjects after the census date must still pay for them.

2.2 Overall enrolment trends

In 2021, Australian higher education institutions in the public data collection enrolled just over 1.6 million students, a decline of 20,000 on the previous year. This ended a run of year-on-year growth that started in 1954 (Figure 1).[18]

Undergraduate numbers increased by the largest absolute number over time, but measured by enrolment share postgraduate coursework shows the most change. It grew from 11 per cent of enrolments in 1979, the first year it can be quantified in the historical enrolment data, to 27 per cent in the 2019 to 2021 period. The postgraduate research student share of enrolments has trended slightly down, to 4 per cent in 2021, although their absolute numbers have increased significantly (section 5.1). Figure 2 shows overall qualification-level trends.

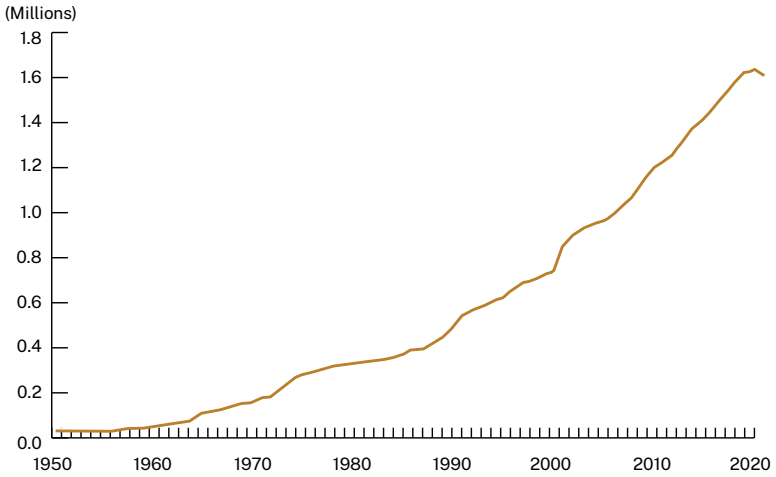
15 The acceptances statistics have historically suffered from missing data, especially in NSW, and so this result may be an under-count. NSW was excluded from this analysis to improve reliability. Calculated from DofE, *Student applications time series, PowerBI.*

16 A. Norton, I. Cherastidtham and W. Mackey, *Dropping out: the benefits and costs of trying university* (Grattan Institute, 2018), section 6.2. Some of this group may never have enrolled if receiving an offer from a university where acceptance and enrolment are separate steps.

17 Special data request from the Department of Education. Bachelor pass degree students only (not honours). Separately, the vocational education student outcomes survey reports 21,000 to 22,000 students in 2021 and 2022 progressing to further study in a university and further study being a benefit of their vocational study. Nearly twice this number of former vocational students report going on to further study in a university. Calculated from NCVER, *VOCSTATS: Total VET student outcomes 2016-2022* (National Centre for Vocational Education Research, 2023).

18 Only higher education institutions receiving Commonwealth financial assistance are in the reported data. Some of the apparent enrolment growth over the decades is from increased institutional eligibility for funding. Appendix A lists the institutions that, except for some recent additions, are in the enrolment data, while Appendix B lists those that are not. If reported, international student enrolments would increase by more than domestic enrolments, since institutions focused exclusively on the international market have no need for public funding. There is some double counting in the enrolment data, from the same person enrolling in two institutions in the same year.

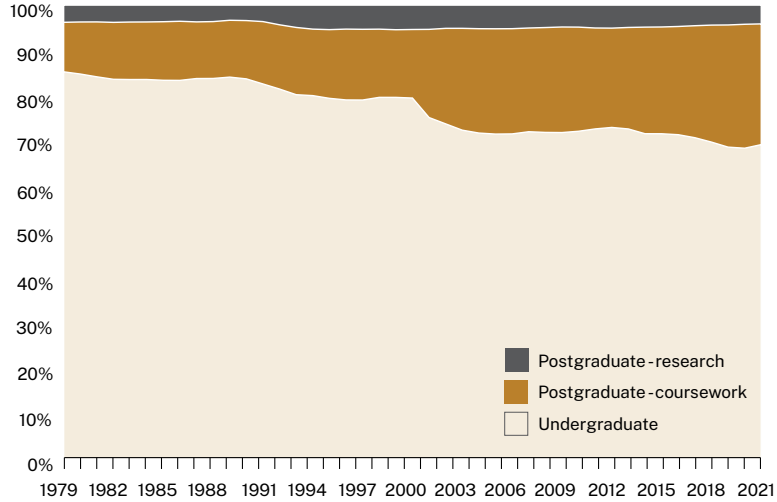
Figure 1: Higher education students, 1950–2021



Notes: Figures from 2001 onwards are based on enrolments at any time throughout the year; prior years are based on enrolments as at 31 March. Includes enabling and non-award course enrolments.

Sources: Department of Education: Time series data 1949–2000; uCube; Student enrolment pivot table.

Figure 2: Enrolment share by level of study, 1979–2021



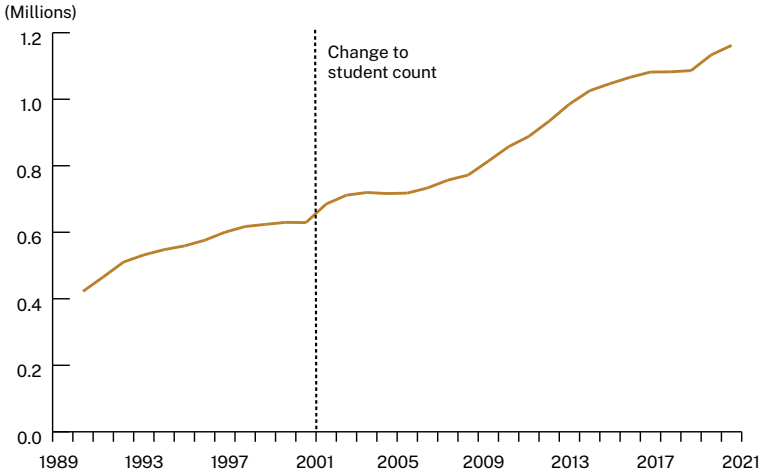
Notes: Enabling and non-award study included in undergraduate to the year 2000. From 2001 only AQF qualifications are included. See also the 2001 changes noted for Figure 1.

Sources: See Figure 1.

2.3 Domestic students

In 2021, 1.16 million domestic students made up 73 per cent of the total (Figure 3). Occasional years of slow growth or small declines interrupt the long-term trend towards more domestic students.

Figure 3: Domestic higher education students, 1989–2021



Notes: See Figure 1 on the 2001 changes to enrolment counts. Domestic students include Australian citizens, permanent residents, and New Zealand citizens.

Sources: See Figure 1.

As with the total student population, domestic undergraduate numbers have increased the most in absolute terms, reaching an all-time high of 839,242 students in 2021. Postgraduate coursework, with 249,554 domestic students in 2021, has grown in enrolment share. They made up 21.5 per cent of domestic students in 2021.[19]

No official 2022 domestic enrolment data is available at the time of writing but a fall in student numbers is expected.[20]

2.3.1 Courses taken by domestic students

Australian universities have always offered a mix of general and professional education courses, with most recent domestic students taking professional courses (Figure 4).[21] 'Society and culture', the largest broad field of education shown, is an ABS classification that adds together courses reflecting many different student interests and professional outcomes. At a subject level, its main categories are fields commonly taught in arts faculties (such as philosophy, politics, history, sociology and languages) at 32 per cent, law at 21 per cent, psychology at 20 per cent, social work and counselling at 10 per cent and economics at 7 per cent.[22]

Since 2001, business-related courses have lost significant enrolment share while health-related fields gained it. IT enrolment share has been increasing since 2014 but remains below 2001 boom levels. Because overall student numbers expanded significantly in this period (Figure 3), all disciplines except agriculture increased domestic enrolments.

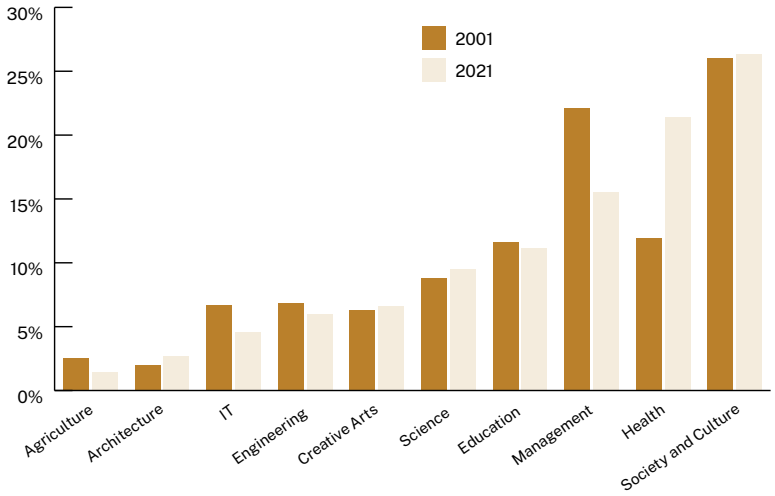
19 Calculated from DofE, *Students: Selected higher education statistics 2021*, table 2.2.

20 On ABS survey figures as of May 2022 by approximately 5 per cent: calculated from ABS, *Education and Work, TableBuilder* (Australian Bureau of Statistics, 2023). On a full-time-equivalent basis NSW universities also reported an approximately 5 per cent decline: NSW Audit Office, *Universities 2022: Financial audit 31 May 2023* (Audit Office of New South Wales, 2023), pp. 6–7. See also the downward trends in student income support recipients (section 3.7.3) and student loans (section 6.4.2).

21 G. Davis, *The Australian idea of a university* (Melbourne University Press, 2017), pp. 42–44.

22 Calculated from DofE, *Students: Selected higher education statistics 2021*, table 4.5.

Figure 4: Domestic enrolment share by broad field of education, 2001 compared to 2021



Note: All qualification levels. Due to combined courses the totals exceed 100 per cent.

Sources: Department of Education, Enrolment PowerBI, uCube and Selected student statistics.

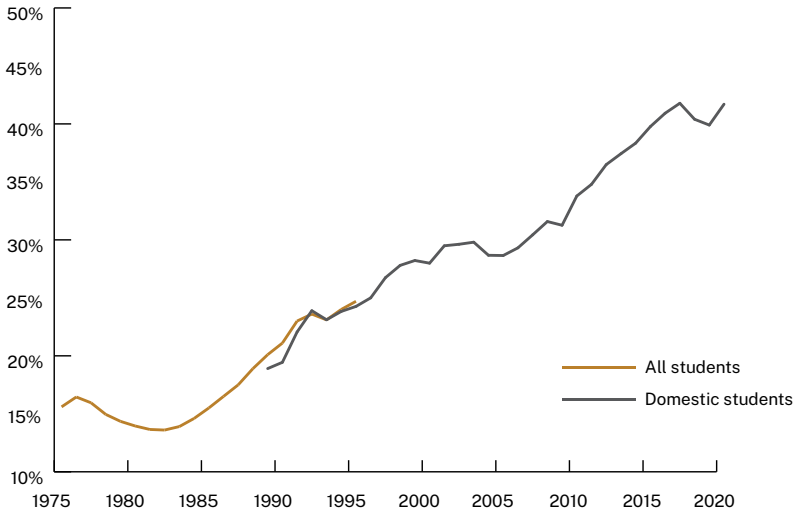
2.3.2 Domestic participation rates

Participation rates show the proportion of people enrolled in higher education. Figure 5 reports estimated higher education participation rates for Australians aged 19 years, the modal student age. In 2020, 41.7 per cent of 19-year-olds were enrolled in higher education, more than double the 1989 rate. The 2021 census, counting only Australian citizens, showed a 41.6 per cent participation rate at age 19 years.[23] Figure 5 also shows an earlier time series starting in 1975, using data that includes small numbers of international students. Participation rates tripled between 1980 and 2020. Eventual degree attainment is reported in section 9.1.

While overall participation rates have increased significantly, patterns of change differ across groups in Australian society.

23 Calculated from ABS, *Census of population and housing, 2021, TableBuilder Pro* (Australian Bureau of Statistics, 2022).

Figure 5: Domestic higher education participation rates, age 19 years, 1975–2020



Notes: The 1975–1995 time series includes small numbers of international students. Since the mid-1990s temporary migrants have made ABS population figures less reliable for calculating domestic participation rates. From 1989, onshore international student enrolments are deducted from the ABS population figures to improve on population estimates. The decline in participation in 2018 and 2019 is primarily due to an increased population estimate rather than decreased domestic enrolments.

Sources: DEETYA, Higher education participation rates, Australia. Department of Education, Students: Selected higher education statistics (various years); Special data requests (various years). ABS, National, state and territory population.

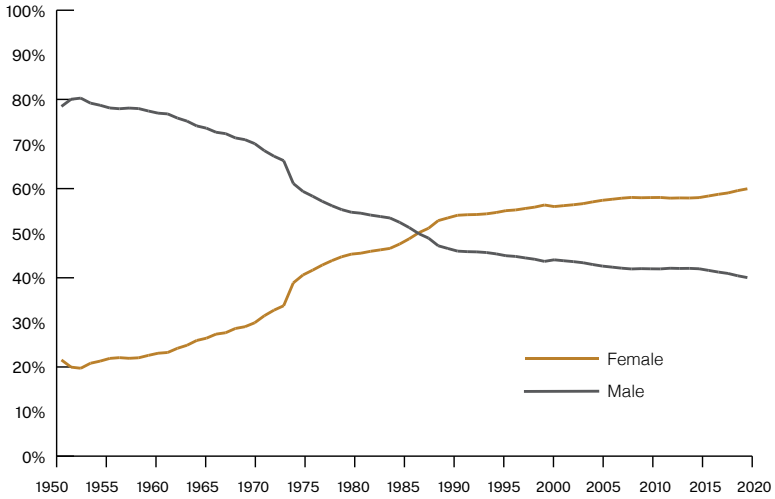
2.3.3 Gender

Australian universities used to be places mainly for men. In the 1950s, only one in five university students were women. But from the late-1950s women started a 50-year run of consistent annual gains in enrolment share, becoming a majority in 1987. Male and female domestic enrolments increased at the same rate for a decade before the female share again began increasing in the late 2010s, reaching 60 per cent in 2021 (Figure 6). In 2021 at age 19 for Australian citizens, 48.9 per cent of women and 34.5 per cent of men were enrolled in higher education.[24]

Patterns of enrolment by gender changed for several reasons: the changed overall social position of women; entry into occupations dominated by women (such as teaching and nursing) require higher education qualifications; girls outperform boys at school; and young men have better-paying vocational education options than young women.

24 Calculated from ibid.

Figure 6: Proportion of domestic enrolments by gender, 1950–2021



Notes: Prior to 1989 the times series data includes international and domestic students, which leads to slight under-estimates of the domestic female share. Since 2014, a gender 'X' category has been available, with 3,000 students classified this way in 2021.

Source: See Figure 1.

2.3.4 Socioeconomic status

Over the long-term, higher education attainment has increased across all socioeconomic groups. One common measure of socioeconomic status (SES) is parental occupation.[25] By 2001, children born in the 1970s whose parents worked in manual occupations had nearly five times the higher education attainment of the children born in the 1950s to manual workers. The higher education attainment level of children of 'upper service' workers increased by about two-thirds in the same period.[26]

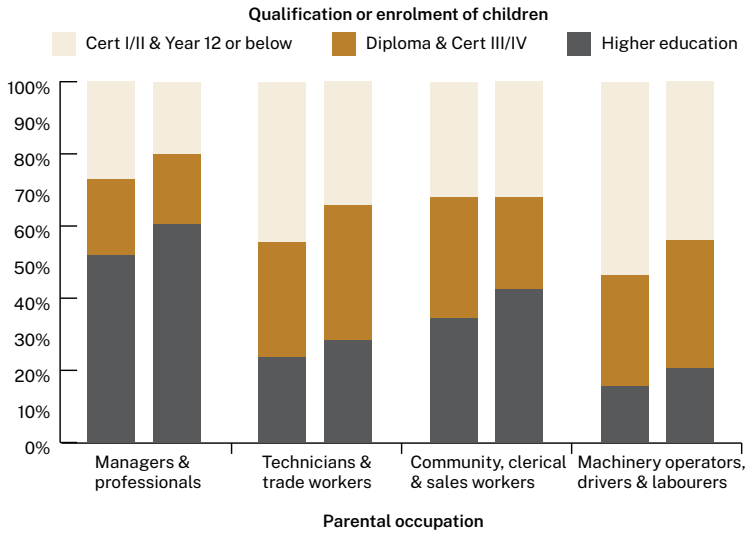
Figure 7 shows the higher education participation or qualification attainment levels of people aged 20 to 25 years in 2010 and 2020, classified according to their parents' occupations. Across the decade, higher education became more common for young adults from all backgrounds, reflecting the enrolment increases discussed in section 2.3. But family background remained a large influence on participation and attainment. In 2020, 21 per cent of the children of machinery operators, drivers and labourers were in higher education or had a degree. The children of managers and professionals had a participation and attainment rate of 61 per cent.[27]

25 In the higher education enrolment data SES is defined by the student's address, using ABS data on the education and occupation of people in that location. This section uses more precise data from other sources.

26 G. Marks and J. McMillan, 'Australia: Changes in socioeconomic inequalities in university participation', in *Stratification in higher education: A comparative study*, ed. Y. Shavit, R. Arum, and A. Gamoran (Stanford, California: Stanford University Press, 2007).

27 For attainment by parental education with no trend data see Ai Group, *Connecting the dots: exploring young Australians' pathways from education and training into work* (Ai Group Centre for Education and Training, 2023), p. 27.

Figure 7: Level of educational enrolment or attainment by parental occupation, age 20 to 25 years, 2010 and 2020



Source: HILDA.

School outcomes limit higher education options for young people from low socioeconomic backgrounds. They are less likely to finish school than students from high socioeconomic backgrounds, and much less likely to attain a high ATAR.[28] Although school results vary significantly by SES, for a given ATAR level, university application and participation rates differ little across different socioeconomic backgrounds.[29]

2.3.5 Indigenous enrolments and participation rates

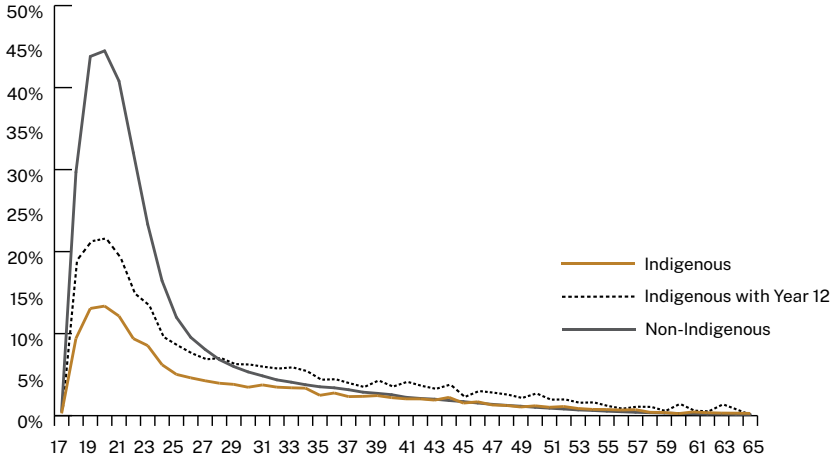
The number of Indigenous students has increased each year since 2006, reaching 23,967 in 2021.[30] Indigenous higher education participation rates, however, are low compared to other Australian citizens (Figure 8). Year 12 completion increases the Indigenous participation rate but to less than half the non-Indigenous rate for people aged between 19 and 22 years. After age 30, first degree participation rates remain low but are more similar for Indigenous and non-Indigenous Australians.

28 Productivity Commission, *Report on government services 2022: Part B: Child care, education and training* (Productivity Commission, 2022); A. Manny, *Socio-economic status and the ATAR* (Universities Admissions Centre, 2020).

29 Manny, *Socio-economic status and the ATAR;* Norton, Cherastidtham and Mackey, *Mapping Australian higher education 2018*, p. 26.

30 DofE, *Students: Selected higher education statistics 2021*, table 11.1.

Figure 8: Indigenous and non-Indigenous higher education participation rates by age, 2021



Notes: Citizens only, persons with no prior higher education qualifications only.

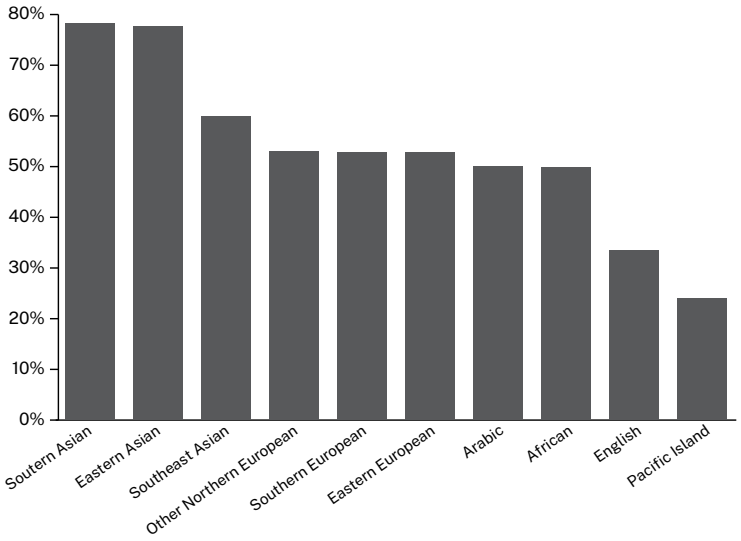
Source: ABS, Census 2021, TableBuilder Pro.

2.3.6 Language background

Most domestic students speak English at home (82 per cent). The most common other home languages are Mandarin, Arabic, Vietnamese and Cantonese.[31] Young people who speak languages other than English at home typically attend university at high rates (Figure 9). In communities speaking Eastern Asian languages, such as Cantonese or Mandarin, or Southern Asian languages, such as Hindi or Bengali, participation rates are well over twice that of their contemporaries who speak English at home.

31 Ibid., table 9.2.

Figure 9: Domestic higher education participation rates, age 18 to 20 years, by language spoken at home, 2021



Notes: Australian citizens only. For Pacific Island languages, ancestry was also used to better identify the group of interest.

Source: ABS, Census 2021, TableBuilder Pro.

2.4 International students

International students have long studied at Australian universities. Prior to the mid-1980s, international enrolments were often wholly or partly subsidised.[32] From 1986, universities could take international students at fees they set and kept, making them a source of revenue (section 6.4.3). Since 1999, migration policies have favoured former international students (see also section 10.4).[33] Australian universities also established branch campuses overseas or partnered with education providers in other countries to deliver Australian courses.[34]

32 E. Meadows, 'From aid to industry: A history of international education in Australia', in *Making a difference: Australian international education* ed. D. Davis and B. Mackintosh (UNSW Press, 2011); L. Megarrity, 'A highly regulated 'free market': Commonwealth policies on private overseas students from 1974 to 2005,' *Australian Journal of Education* 51, no. 1 (2007); L. Megarrity, 'Regional goodwill, sensibly priced: Commonwealth policies towards Colombo plan scholars and private overseas students, 1945–72,' *Australian Historical Studies* 38, no. 129 (2007). A limited number of international students from developing countries still receive Australian Government scholarships. International students are also eligible for places funded under the Research Training Program (section 6.7.1).

33 For an overview see H. Spinks and E. Koleth, *Overseas students: immigration policy changes 1997–2015* (Parliamentary Library, Parliament of Australia, 2016).

34 G. Croucher et al., *Australia's higher education delivery offshore and online - trends, barriers, and opportunities* (Melbourne Centre for the Study of Higher Education, 2020).

2.4.1 International student admissions

For higher education providers the same general rules apply for admitting domestic and international students (section 2.1).

International students from non-English speaking countries must prove their English language proficiency. One major language testing service, IELTS, recommends for academic courses a 'band' of at least 6.5 on a scale where one is lowest and nine is highest.[35] No university's general requirement is above 6.5, although specific courses require higher levels.[36] Before COVID-19 interrupted international student arrivals about one in five international higher education students first enrolled in an Australian English language course.[37]

As for domestic students, international students must also meet course-specific criteria. Universities publish guides converting their admission requirements to school results from other countries.

For international students seeking to study onshore in Australia the need for a student visa adds a layer to the admission process. Visa applicants must show confirmed enrolment for their course, have health insurance, meet rules on English language ability, and demonstrate that they can support themselves financially. The amount of evidence needed depends on the applicant's home country and education provider. Providers are rated according to their history of visa refusals, visa cancellations, and students overstaying their visa.[38]

2.4.2 International student enrolments

Until COVID-19, international student enrolments had experienced only one significant setback in their commercial phase. In the late-2000s, exchange rate factors, changes to visa rules, and publicity in India about crimes suffered by Indian students caused enrolments to fall. This was a small reversal compared to the impact of COVID-19. Australia's borders closed in March 2020 and did not reopen until December 2021, preventing the arrival of international students. In 2021, international enrolments were at 440,661, down 16 per cent on their 2019 peak (Figure 10). This made them 27.5 per cent of all enrolments, down from 32.4 per cent in 2019.

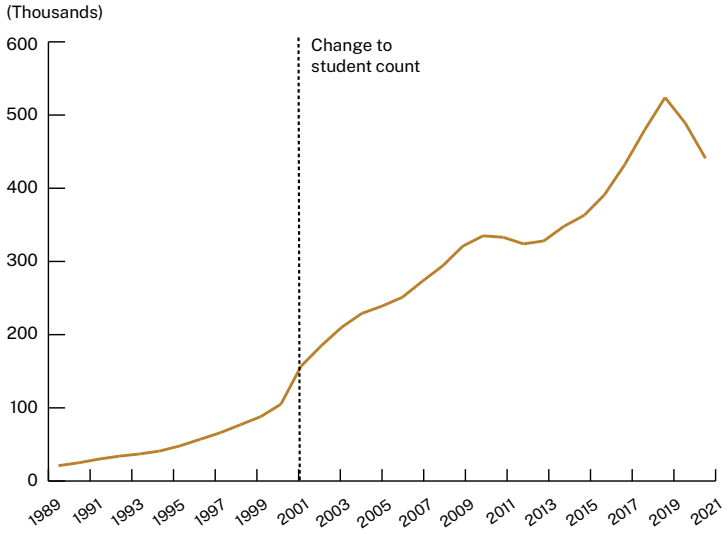
35 IELTS, *Guide for educational institutions, governments, professional bodies and commercial organisations* (International English Language Testing System, 2018), pp. 14–15.

36 This conclusion was the result of a full check of university websites in 2018. Rechecking a sample of these websites in August 2022 revealed no changes.

37 DofE, *Education pathways of international students while on a student visa* (Department of Education, 2022).

38 DHA, *Methodology for calculating evidence levels (education provider report)* (Department of Home Affairs, 2023).

Figure 10: International higher education students, 1989–2021



Note: Figures from 2001 onwards are based on full-year enrolments; prior years are based on enrolments as at 31 March.

Sources: Department of Education, Time series data 1949–2000; Department of Education, Selected student statistics.

This enrolment decline had significant consequences but was smaller than initially feared. Chinese students, in 2019 a third of enrolments, proved surprisingly willing to study online from China. Between 2019 and 2021, offshore enrolments increased from 22 per cent to 41 per cent of all international students.[39]

A higher than usual proportion of international students who commenced in 2019 did not return in 2020, but the 'pipeline' effect (most first-year students continue into a second year and so on, according to degree length) of prior boom years made 2020 a record year for continuing students. For undergraduate international students 2021 set another enrolment record for continuing student enrolments.[40] However, fewer commencing students in 2020 and 2021 mean that the pipeline effect reduced continuing student numbers in later years. In March 2022, the number of higher education student visa holders was 40 per cent lower than in August 2020.[41]

Although total student visa holders remained below previous levels in 2022, commencing student numbers entered a recovery phase. For 2022, annual commencing students were 84 per cent of 2019 numbers.[42] As of March 2023, commencing higher education students exceeded 2019 levels.[43] Student visa applications as of April 2023 suggest a continued strong recovery in commencing student numbers.[44]

39 DofE, *Students: Selected higher education statistics 2021*, table 7.5 (and preceding years).

40 In 2020, 14.2 per cent of international students who had commenced in 2019 were not enrolled in 2020, compared to 11.4 per cent of those who started in 2018 and not enrolled in 2019: DofE, *Attrition, retention and success rates for commencing higher education students, PowerBI* (Department of Education, 2023). For commencing and continuing students see DofE, *Student enrolment pivot table.*

41 DofE, *Pivot table visa holders by citizenship* (Department of Education, 2023). The number of students enrolled offshore without a visa in March 2022 is unknown.

42 Ibid.

43 DofE, *International student data - for the year-to-date* (Department of Education, 2023).

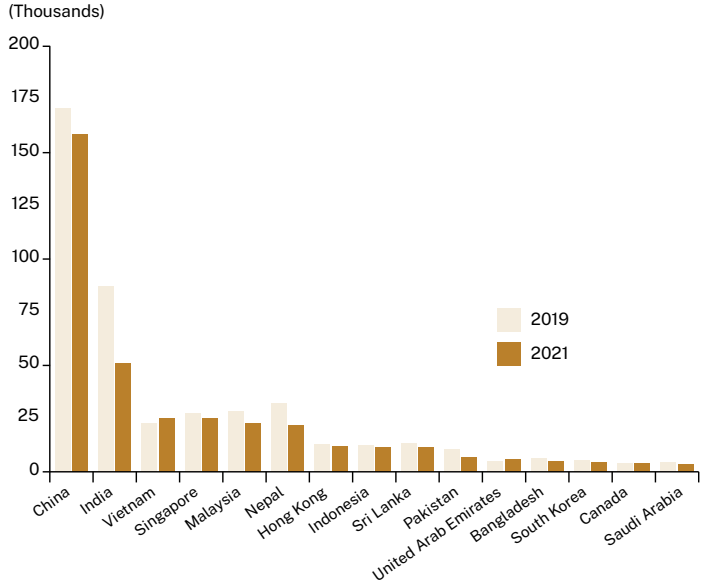
44 DHA, *Student visa program (pivot tables)* (Department of Home Affairs/data.gov.au, 2023).

2.4.3 International student source countries

In 2021, Australian higher education providers enrolled students from 182 countries.[45] Despite this large number, China (36 per cent) and India (12 per cent) made up nearly half of international student enrolments. Source countries can reach the top 15 list shown in Figure 11 with only one per cent of all enrolments.[46] International students from South Asian countries including India rely on Australian labour market income to finance their education (see section 3.7.1 for student work practices). South Asian students' study decisions were consequently more affected by closed international borders, as the Figure 11 comparison between 2019 and 2021 shows. Australia's reliance on China and India as source countries is sometimes raised as a concern.[47]

At an institution level, source country concentration is greater, as Chinese students tend to go to more expensive, higher prestige institutions, while South Asian students prefer cheaper universities (on fee differences see section 7.4).[48]

Figure 11: Top 15 international student source countries 2021, with 2019 comparison



Note: Onshore and offshore students.

Source: Department of Education, Selected student statistics.

45 DofE, *International student data - full year data (to December 2022)* (Department of Education, 2023).

46 DofE, *Students: Selected higher education statistics 2021*, table 7.4. This includes enrolments at offshore campuses but omits students at providers listed in Appendix B.

47 DofE, *International student diversity at Australian universities: Discussion paper February 2022* (Department of Education, 2022), p. 3.

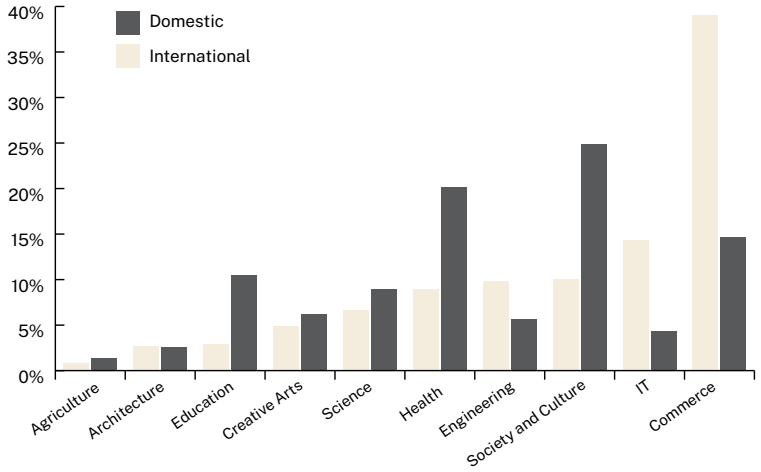
48 J. Chew and E. Forgarty, *Sustainable growth in international higher education* (Nous, 2018).

2.4.4 Courses taken by international students

International students are more concentrated by broad field of education than domestic students, with more than half enrolled in business or IT courses (53 per cent in 2021, Figure 12). Migration considerations influence international student course choices (see section 10.4 on migration). In 2020, international students outnumbered domestic students in both these fields of education, although due to the overall decline in international student numbers this was true only of IT in 2021.

International and domestic students also differ in their choice of qualification level, with international students more likely to take postgraduate courses. The differences are especially significant for coursework masters degrees, with 36 per cent of international enrolments but only 13 per cent of domestic enrolments. International students outnumber domestic students in these courses.[49] A two-year masters degree satisfies the rule that international students must study in Australia for two years to be eligible for post-study work rights and some subsequent permanent residence visas.

Figure 12: International and domestic student enrolment shares by broad field of education, 2021



Source: Department of Education, Enrolment PowerBI.

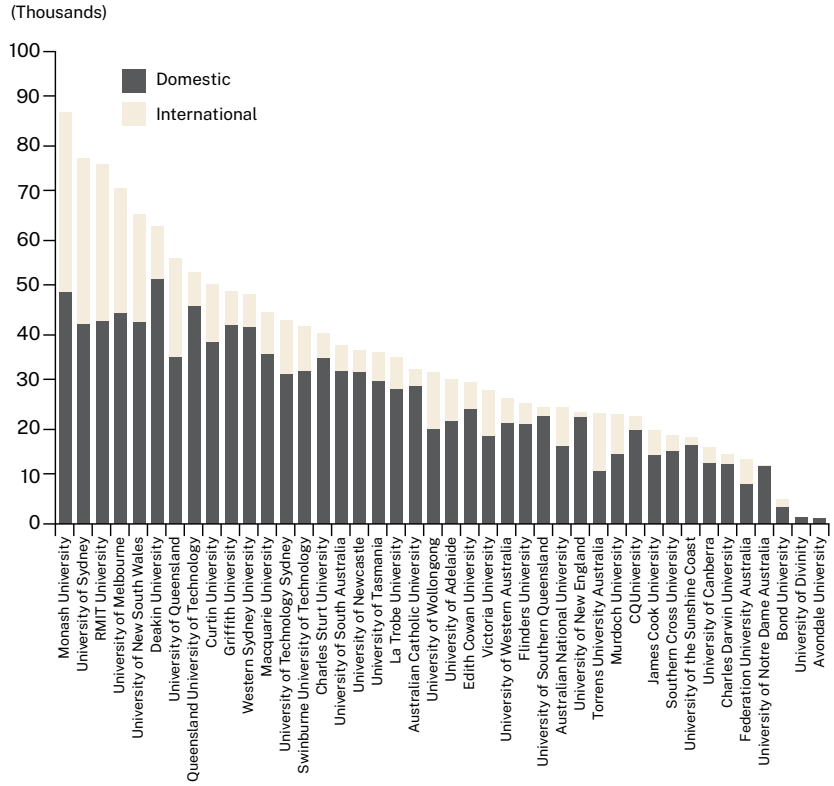
2.5 Student numbers by university

In 2021, Monash University was Australia's largest university by student numbers. It had more international students than any other university. Deakin University had the largest number of domestic students (Figure 13). Of the public universities, the University of Sydney had the highest percentage of students who were international, at 45.5 per cent in 2021.

49 DofE, *Students: Selected higher education statistics 2021*, calculated from tables 2.3 and 7.2.

Monash was also the largest overall and for international students in 2001, but universities grew at different rates this century, altering their relative scale. For domestic students, 2021 first-ranked Deakin had moved up from eighth in 2001. Other universities with strong domestic growth include the Australian Catholic University (30th to 19th largest) and Swinburne University (29th to 14th).[50]

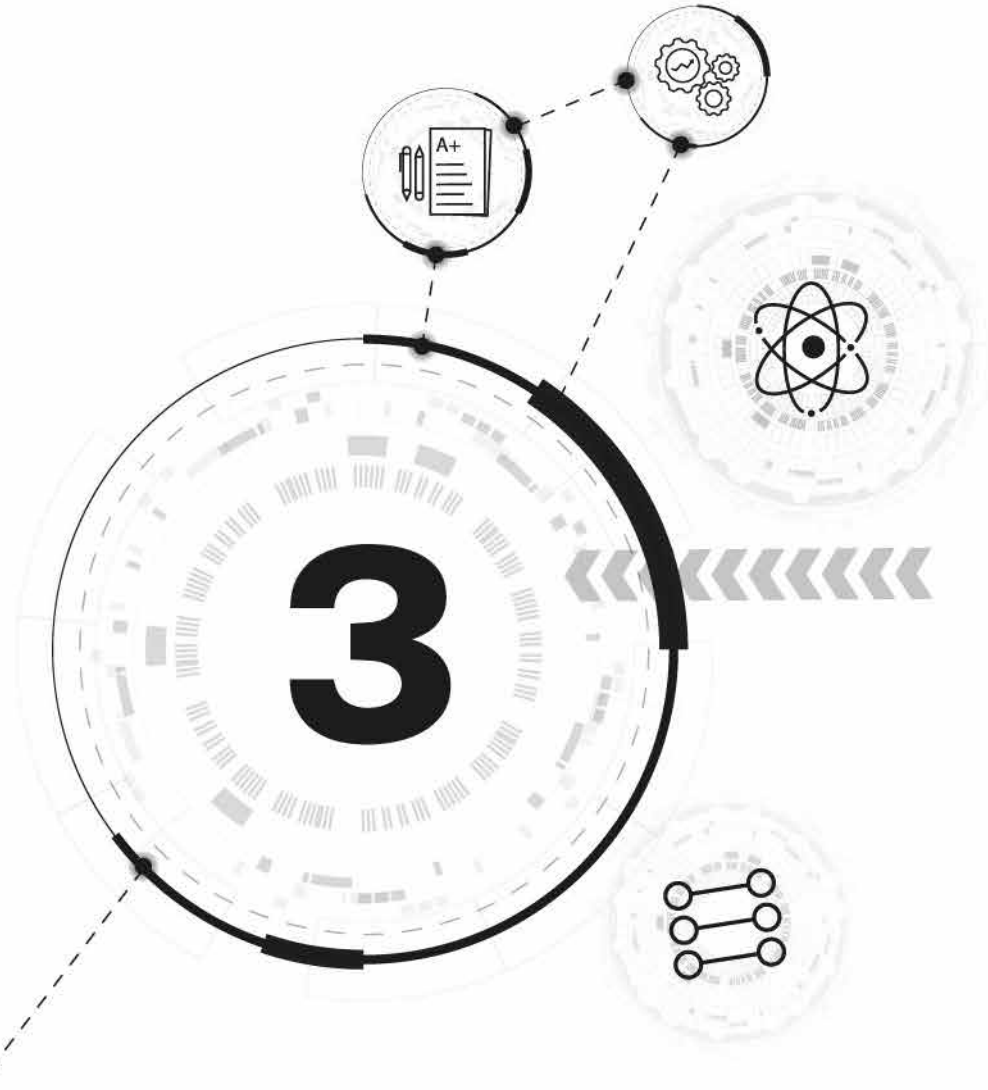
Figure 13: Total enrolment by university, domestic and international, 2021



Source: Department of Education, Student enrolment pivot table.

50 2001 figures from DESE, *uCube - Higher education statistics* (Department of Education, Skills and Employment, 2021).

THE STUDENT EXPERIENCE



3 THE STUDENT EXPERIENCE

This chapter examines the student experience. It covers where students are learning, work-integrated learning, satisfaction with teaching, and rates of successful completion of subjects and courses. It examines how students finance their living expenses and rates of mental health problems.

3.1 Online and part-time study

Technology changes the way students engage with higher education. Educational technology and fast home internet speeds reduce the need for students to go to campus. Increasing numbers rarely do so. Before 2020, enrolments were trending towards online or to 'multi-modal' study, mixing on-campus and online study.[1] For the first time in 2021, a minority of domestic enrolments were 'internal' or on-campus (48 per cent).[2] The main growth was in multi-modal study, with 24 per cent of enrolments.

Forced COVID-19 changes make it hard to distinguish trends and temporary circumstances. Many students who would have preferred a campus experience had to study online. Student satisfaction with in-person parts of the university experience fell (section 3.3). Reduced COVID-19 restrictions in 2022 and later years should see on-campus activity increase again, but possibly not to previous levels.

Changes in the way students engage with higher education are also seen in rates of part-time study, which are increasing slightly for domestic students, with large differences between undergraduates and postgraduate coursework students. For undergraduates, 28 per cent studied part-time in 2021, compared with 65 per cent for postgraduate coursework students.[3] Postgraduate students often have work commitments that reduce their study time. In May 2021, 55 per cent of postgraduate students worked full-time, compared with 26 per cent of undergraduates.[4]

1 Norton, Cherastidtham and Mackey, *Mapping Australian higher education* 2018, p. 24.

2 DofE, *Stu dent enrolment pivot table*. Universities adopted different reporting practices. One Victorian university reported zero on-campus enrolments for 2021, while other universities appear to have reported the student's original intention despite closed campuses for much of the academic year.

3 Ibid.

4 Calculated from ABS, *Education and Work, TableBuilder*.

3.2 Work-integrated learning

Work-integrated learning (WIL) is learning in a work context as part of course requirements.[5] It usually takes place at an employer's premises but can also be simulated on campus. The idea is not new – teaching rounds in education courses and clinical training in health courses are longstanding professional admission requirements – but has become a policy focus. Since 2021, some university grant money has been earmarked for WIL-related and industry partnership activities.[6]

In 2017, 37 per cent of students participated in a WIL-related activity that year, with work placements the most common type.[7] A survey of recent graduates found that 54 per cent had undertaken WIL for academic credit though their degree. This survey also explored other activities without academic credit that may prepare students for future work. Substantial minorities of undergraduates had paid employment relevant to their career while studying or engaged in voluntary activities potentially relevant to employment, such as having an industry mentor or taking a position of responsibility in a club or society.[8]

5 TEQSA, *Guidance note: work-integrated learning* (Tertiary Education Quality and Standards Agency, 2022).

6 DESE, *NPILF [National Priorities and Industry Linkage Fund] Guidance Document* (Department of Education, Skills and Employment, 2021). See also section 6.4.1.

7 Universities Australia, *Work-integrated learning in universities: final report* (Universities Australia, 2019), p. 8.

8 Graduates from 34 universities. D. Jackson et al., *Australian Collaborative Education Network -2022 summary report for Graduate Outcomes Survey items* (Australian Collaborative Education Network/Social Research Centre, 2022), pp. 3–5.

3.3 Student satisfaction

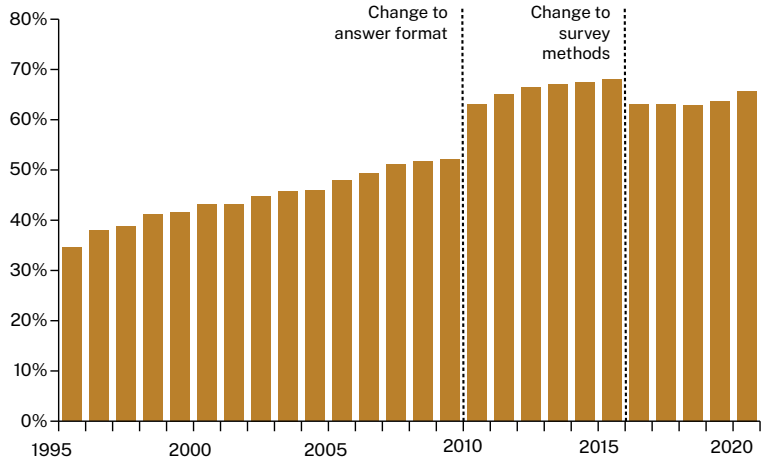
In the 1990s, Australia introduced national student satisfaction surveys. Completing students received a course experience questionnaire (CEQ). Core questions covered teaching, generic skills and overall satisfaction. For teaching, questions were asked about levels and helpfulness of feedback, teaching staff effort and effectiveness, whether students were motivated by teaching staff, and whether teaching staff made an effort to understand difficulties students were having.

Early CEQ results revealed low satisfaction with teaching but a positive trend (Figure 14). Each year, more completing bachelor-degree students indicated satisfaction with elements of university teaching. In 2007, majority satisfaction was achieved. The trend until 2016 was consistently towards more satisfaction. Survey methodology changes in 2010 and 2016 created breaks in the time series.[9] From 2016, results were stable until a slight improvement in 2020, which was the final year these questions were asked.

9 The results are based on averaging responses to teaching questions. In 2010, a previously unlabelled mid-point in a five-point scale was described as 'neither agree nor disagree' with the proposition being offered (for example, 'the staff put a lot of time into commenting on my work'). CEQ respondents may have interpreted 'neither agree nor disagree' as meaning 'I have no opinion', while previously they could have interpreted the unmarked mid-point as representing a view, such as 'middling' or 'mediocre' but not unsatisfactory. The labelling change caused fewer respondents to choose the mid-point and more to choose the second highest point. In 2016, another organisation took over the survey and used different data collection and answer averaging methods.

Possible reasons for long-term improvement in student satisfaction with teaching include research into teaching methods, teacher training, student surveys identifying areas for improvement, academic promotion linked to teaching performance, improved technology including easier communication between students and academics, increased regulation of standards, occasional government financial incentives, and more competition between universities for students.[10]

Figure 14: Satisfaction with teaching, bachelor-degree graduates, 1995-2020



Note: Uses the 'good teaching' scale in the CEQ.

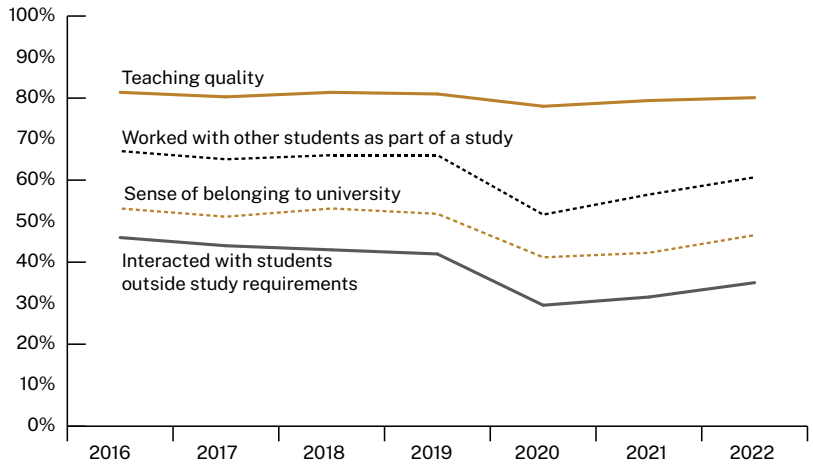
Sources: Graduate Careers Australia (1995–2015)/Social Research Centre (2016–2020).

10 For discussion of possible mechanisms for teaching improvement see A. Norton, J. Sonnemann and I. Cherastidtham, *Taking university teaching seriously* (Grattan Institute, 2013), chapter 6; B. Probert, *The quality of Australia's higher education system: how it might be defined, improved and assured* (Office for Learning and Teaching, 2015).

In 2012, a national survey of current students began, now called the Student Experience Survey (SES). Its specific questions on curriculum, teaching and assessment differ from those in the CEQ, as do the methods used to calculate and report the results. These produce higher satisfaction scores than reported in Figure 14.[11]

Between 2012 and 2022, student satisfaction with teaching quality varied in a narrow range, between 79 per cent and 82 per cent, with 80 per cent recorded in 2022 (Figure 15).[12] COVID-19 disruptions had a minor effect on satisfaction with teaching quality. Questions about relationships with other students and a sense of belonging to the university, however, revealed significantly lower satisfaction than in pre-COVID-19 years.

Figure 15: Select Student Experience Survey satisfaction results, 2016–2022



Note: 'Teaching quality' is a composite indicator based on answers to 11 related questions.

Source: Social Research Centre, Student Experience Survey.

11 The SES allows students to give a clear 'mediocre' or 'middling' response, by choosing options such as 'some' and 'fair'. For 11 questions on teaching quality all responses are coded on a 0–100 scale, and students averaging 55 or more are classified as satisfied. For the specific items in Figure 15 students choosing one of the top two responses on a four or five point scale are classified as satisfied. See SRC, *2022 Student Experience Survey: the higher education student experience* (Social Research Centre/Department of Education, 2023), p. 70.

12 Ibid., p. 3.

In both the CEQ and the SES, international students typically report lower satisfaction with teaching than domestic students. In the 2022 SES, however, their satisfaction levels were near identical.[13] The reasons for these differing teaching satisfaction levels have never been properly explored, but satisfaction tends to be lower in courses popular with international students such as IT, engineering and business (Figure 12).

The 2022 SES included 99 non-university higher education providers (NUHEPs). Students at NUHEPs are on average more satisfied with teaching quality than public university students, but with greater variation in satisfaction levels.[14] Of the 68 NUHEPs with teaching satisfaction data reported in 2022 half reported satisfaction rates exceeding the top-ranked public university. The students of five NUHEPs, however, were less satisfied with teaching than students at the lowest-ranked public university.[15] Teaching satisfaction results by university, NUHEP and field of education are published on the Quality Indicators for Learning and Teaching (QILT) website at www.qilt.edu.au.

3.4 Passing and failing

Each year, the government publishes subject 'success rates' for domestic and international commencing bachelor degree students. These show the proportion of subjects successfully completed of all subjects for which the student reached the census date (section 2.1.2). Since 2010, international students have had a higher success rate than domestic students. In 2021, their success rates were 88 and 85 per cent, respectively.[16]

One reason for this difference is that international students are less likely to withdraw from subjects after the census date.[17] High fees and a full-time study visa condition create incentives to continue with subjects. Domestic students face lower costs if they drop subjects they do not enjoy, think they might fail, or stand in the way of other activities.

For subjects in which students remained enrolled, domestic students had higher pass rates than international students until recently (Figure 16). The crossover year for a higher international student pass rate was 2020 for later-year students and 2021 for first-year students.

13 GCA, *Graduate course experience 2014: figures and tables (Excel file)* (Graduate Careers Australia: Graduate Careers Australia, 2015), table H; SRC, *2022 Student Experience Survey: the international student experience*, p.5.

14 SRC, *2022 Student Experience Survey: the higher education student experience*, chapter 6.

15 Low enrolments at some NUHEPs and sometimes poor response rates to the SES survey mean institution-level results cannot always be reported. The reported NUHEP results pool data from 2021 and 2022 to increase sample size.

16 DofE, *Students: Selected higher education statistics 2021*, tables 15.4 and 15.5. On a full-time-equivalent basis.

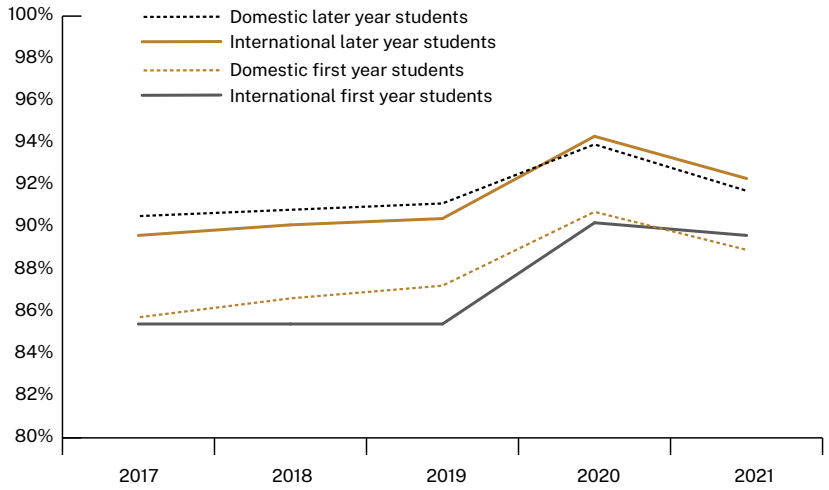
17 This number is not routinely reported, but for bachelor degree students in 2016, international students withdrew from 0.7 per cent of subjects compared with 2.2 per cent of subjects for domestic HELP borrowers: Department of Education data provided to the Grattan Institute.

Interpreting pass rates is not straightforward. Some fails are by 'ghost students' who never seriously engaged with one or more subjects. At one university nearly four per cent of subjects taken by its domestic commencing bachelor-degree students had a grade of zero per cent, having never submitted any work for assessment.[18] In a survey of 2,000 current students, 17 per cent reported being charged fees for a subject they were no longer taking, which happens when a subject census date passes without enrolment formally ending.[19]

Pass rates are higher for later-year than first-year students. This is consistent with students at high risk of failing subjects leaving higher education after their first year and the remaining students adapting to university life.

Pass rates increased between 2019 and 2020, raising a question as to why. In first semester 2020, some universities offered later census dates than usual, giving students more time to drop subjects they were at risk of failing. With opportunities for socialising and paid work reduced by COVID-19 restrictions, study effort may have increased. Possibly academics were lenient on students struggling with online learning in 2020. Pass rates fell slightly in 2021.

Figure 16: Subject pass rates for bachelor-degree domestic and international students, 2017–2021



Notes: The calculation is subjects passed as a percentage of all subjects passed or failed. Withdrawn, yet-to-be-determined and missing subject results are not counted. Subjects dropped before the census date are not recorded in the data.

Source: Department of Education, Special data request.

18 B. Stephenson, B. Cakitaki and M. Luckman, *'Ghost student' failure among equity cohorts: towards understanding non-participating enrolments* (National Centre for Student Equity in Higher Education, 2021).

19 DofE, *Research findings: Census date for higher education courses* (Department of Education, 2022), slide 9.

3.5 Academic integrity

Although section 3.4 suggests benign reasons for an increase in pass rates, not all pass grades reflect genuine academic success.

A survey of 14,000 students in eight Australian universities found that six per cent self-reported cheating on an assignment and/or an exam. International students were twice as likely as domestic students to admit to cheating.[20] In 2021, the University of New South Wales identified more than 2,500 cases of plagiarism and other academic misconduct, involving four per cent of its enrolments.[21] In another university student survey, three per cent admitted to using a ghost writer and 10 per cent to verbatim copying without acknowledgment.[22]

In a survey of 1,150 academic staff, more than two-thirds had suspected that an assessment task was not written by the student who submitted it. In more than 60 per cent of such cases, the academic's knowledge of the student's language ability was a reason for their suspicion. Seven per cent of staff were aware of their students cheating in an exam.[23]

Cheating is a commercial industry, with websites offering to write student essays and assignments for money. Cheating services have been illegal since 2020.[24] By June 2022, TEQSA had identified 579 cheating websites directly targeting Australian students, with access to 150 sites blocked by October 2022.[25] It said that these websites received over 500,000 visits per month from Australian users.[26] Artificial intelligence applications able to write essays and perform other assessment tasks create significant new academic integrity issues.

Although cheating services are widely used, earlier survey research found that most people who cheat use work by other students or friends.[27] While some cheating is sophisticated, often it is amateurish, with document metadata (10 per cent) and off-topic content (36 per cent) being common grounds for academics suspecting malpractice.[28]

20 T. Bretag et al., 'Contract cheating: a survey of Australian university students,' *Studies in Higher Education* 44, no. 11 (2019).

21 UNSW Sydney, *Student conduct and complaints 1 January - 31 December 2021* (University of New South Wales, 2022), p. 5.

22 G. Curtis and K. Tremayne, 'Is plagiarism really on the rise? Results from four 5-yearly surveys,' *Studies in Higher Education* 46, no. 9 (2021).

23 R. Harper et al., 'Contract cheating: a survey of Australian university staff,' *Studies in Higher Education* 44, no. 11 (2019).

24 *Tertiary Education Quality and Standards Agency Amendment (Prohibiting Academic Cheating Services) Act 2020.*

25 TEQSA, 'Intelligence sharing: updated cheating website database', 24 June 2022. TEQSA, 'TEQSA disrupts access to another 110 illegal academic cheating websites', *Tertiary Education Quality and Standards Agency,* 13 October 2022.

26 P. Coaldrake, 'Protecting Sector Integrity: Adapting to generative artificial intelligence, and an update on activities to combat industrial-scale cheating', *Chief Commissioner's letter*, 1 February 2023.

27 Bretag et al., 'Contract cheating: a survey of Australian university students'.

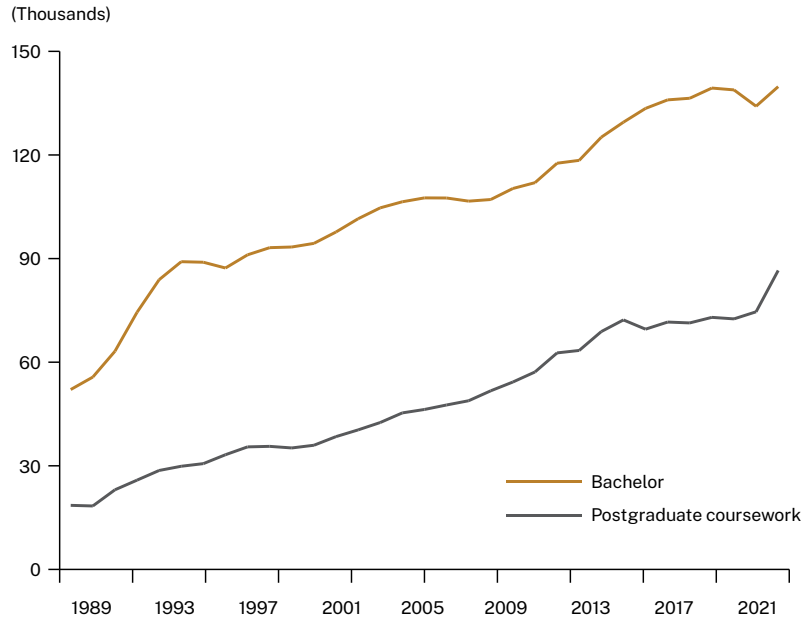
28 Harper et al., 'Contract cheating: a survey of Australian university staff'.

‘Soft marking’ is another academic integrity issue, which can come from student or university pressure. In a National Tertiary Education Union survey, 30 per cent of academics agreed with the proposition that they felt pressure to pass full-fee-paying students whose work was not good enough.[29] In a South Australian ICAC survey, 11 per cent of respondents reported ‘inappropriate practice, pressure or influence’ in student assessment.[30]

3.6 Course attrition and completion

Annual domestic student course completions have more than doubled since 1989 (Figure 17). In 2021, 139,781 bachelor degrees and 86,555 postgraduate coursework qualifications were awarded. Both totals were the highest yet recorded with bachelor-degree completions recovering after numbers fell in 2019 and 2020. For bachelor degrees, increased attrition and students taking longer to finish courses have complicated the relationship between commencements and completions.

Figure 17: Degree completions for domestic students, 1989–2021



Sources: Department of Education: Time series data 1949-2000; uCube; Award course completions pivot table.

29 K. McAlpine, ‘Highlights of the 2019 State of the Uni survey,’ *Advocate (NTEU)* 27, no. 1 (2020), p. 11.

30 ICAC-OPI, *ICAC university integrity survey 2020 South Australia* (Independent Commissioner Against Corruption (South Australia)/Office for Public Integrity, 2020), p. 44.

Of the students who first started a bachelor degree in Australia in 2013, 24.6 per cent left without completing a degree in the following nine years. Of the others, 4.8 per cent were still enrolled, and the remaining 70.5 per cent had completed a degree (not necessarily the one they started). This is the lowest long-term completion rate recorded since the current statistical series began with the commencing students of 2005. Bachelor-degree students who commenced in 2008 achieved the best result of 74 per cent completion after nine years.[31]

The completion rate decreased mainly because universities enrolled more students with characteristics that elevate attrition risk, such as a low ATAR or part-time study, which indicates competing time commitments (see also section 3.7.1).[32] As discussed in section 3.8, an increased proportion of students report mental health issues, which are also associated with attrition.

Despite these factors, short-term attrition rates – students not enrolled in what would have been their second year – trended down for domestic bachelor-degree commencing students between 2018 and 2020. The 2020 figure of 12.7 per cent was the lowest since 2011.[33]

31 DofE, *Completion rates of domestic bachelor degree students: a cohort analysis, 2005-2021* (Department of Education, 2023).

32 Norton, Cherastidtham and Mackey, *Dropping out: the benefits and costs of trying university*, pp. 24–29, 33–36.

33 DofE, *Students: Selected higher education statistics 2021*, table 15.1. Survey research found some students reporting withdrawing from a course of study in 2020 due to COVID-19: Wikins et al., *The Household, Income and Labour Dynamics in Australia Survey: Selected findings from waves 1 to 20, the 17th annual statistical report of the HILDA survey*, p. 133. While this may have been the case, other factors such as more limited alternatives to study due to COVID-19 restrictions and the higher subject pass rate (section 3.4) may have reduced attrition.

Some attrition is not necessarily bad. Not all students arrive at university with clear goals; some decide it is for them and stay and others leave.[34] Students who depart in their first year limit their time and money costs.[35] Students can benefit from attending university despite not completing a degree. In a Grattan Institute survey, 40 per cent of people who had dropped out said they would still begin their degree despite knowing what they know now, suggesting that the benefits outweighed the costs. But 10 per cent of students who drop out have studied for three years or more, accumulating substantial student debt.[36]

The combination of increased enrolments and non-completion rates has made not completing a degree a common experience. In 2018–19, 1.4 million people had an incomplete higher education qualification. Of these 642,000 neither had a degree nor were currently enrolled in non-school study.[37]

3.7 Student personal finance

Student income comes from labour market earnings, family support, government income support, and scholarships.

34 On sense of purpose: C. Baik, R. Naylor and S. Arkoudis, *The first year experience in Australian universities: findings from two decades 1994-2014* (Melbourne Centre for the Study of Higher Education, 2015), p. 23.

35 Norton, Cherastidtham and Mackey, *Dropping out: the benefits and costs of trying university*, pp. 8–12, 17–18. Of the 2013 commencing cohort, a third of those who did not complete never returned after their first year.

36 Ibid., pp. 16–22.

37 Calculated from ABS, *Qualifications and work, Australia, 2018-19, TableBuilder* (Australian Bureau of Statistics, 2020).

In 2021, declared median full-time student income was about $21,000 a year.[38] Data from 2017 explored the balance between income and expenditure. Full-time domestic undergraduates reported median annual income of $18,300 and expenditure of $14,200, of which $1,300 was study-related. Median income in 2021 for part-time students, including those with no declared labour market income, was about $44,400 a year.[39]

3.7.1 Labour market income

Work commitments are a major reason for part-time study. Among part-time tertiary students, which includes vocational education students, 85 per cent were employed in August 2022. Two-thirds of them worked full-time.[40] Median weekly employee earnings for employed part-time students were $1,065 in August 2022.[41]

Student employment rates fluctuate during each year and with the business cycle, but full-time tertiary student employment data starting in the mid-1980s shows a long-term upward trend.[42] An annual survey found that in May 2022, 71 per cent of full-time domestic higher education students were employed. More students work at some point during their course than at any one time. Eight in 10 recent bachelor-degree graduates worked for money during their course.[43]

Just under half (47 per cent) of international students were employed in May 2022. Work rates differ significantly by region of origin; 67 per cent of students from Southern and Central Asia were employed compared with 33 per cent of students from North-East Asia.[44]

Full-time tertiary students spend an increasing amount of time on paid work. The proportion working more than 20 hours per week was 45 per cent in 2017 and 60 per cent in 2022. Their median weekly earnings increased from $400 to $611 in this period.[45]

38 Calculated from ABS, *Census of population and housing, 2021, TableBuilder Pro*. Counting only students whose highest qualification was less than a bachelor degree. Includes students with no income (9 per cent). This uses the administrative data supplement to the census, using linked information from the ATO and the Department of Social Services, with 6.4 per cent of records not able to be linked. This source misses gifts and cash-in-hand income but provides more detailed income data than the self-reported census categories and uses annual income, which minimises issues with fluctuating weekly student income.

39 See footnote 147. Part-time student income and expenditure in 2017 was evenly balanced: Universities Australia, *2017 Universities Australia student finances survey* (Universities Australia, 2018), pp. 18, 27.

40 ABS, *Labour Force, Australia, Detailed* (Australian Bureau of Statistics, 2022), table LQ2.

41 Calculated from ABS, *Characteristics of Employment, 2014-2022, TableBuilder* (Australian Bureau of Statistics, 2022).

42 ABS, *Labour Force, Australia, Detailed*, table LM3.

43 Jackson et al., *Australian Collaborative Education Network -2022 summary report for Graduate Outcomes Survey items*, p. 4.

44 Calculated from ABS, *Education and Work, TableBuilder*. The main source countries from Southern and Central Asia are India and Nepal; from North-East Asia the main source country is China.

45 Calculated from ABS, *Characteristics of Employment, 2014-2022, TableBuilder.*

Using Australian Taxation Office (ATO) data, median annual employee earnings for temporary student visa holders were $14,705 in 2019–20, a figure affected by lockdowns in the last quarter of the financial year.[46] At the time visa conditions restricted international students to 40 hours of work per fortnight during semester. During 2022, this cap was removed, with 42 per cent of employed international students working 30 hours a week or more.[47] From 1 July 2023, the work cap changed to 48 hours per fortnight.

In 2022 the proportion of domestic undergraduates reporting 'negative effects of paid work on study' was nearly 40 per cent. This was an increase on the 36 or 37 per cent usually recorded between 2017 and 2021.[48]

3.7.2 Family support

In a 2017 survey of student finances, 62 per cent of full-time undergraduates reported financial support from their family or partner. Fifteen per cent of domestic undergraduates reported receiving a regular allowance. For international students, the allowance figure was much higher at 51 per cent.[49]

Domestic students save money by living at home. Census data from 2021 shows that 85 per cent of Australian citizen 18-year-old university students live with a close relative. This declines to under half of students by age 24 years.[50]

3.7.3 Student income support

Full-time students with Australian citizenship or permanent residence are eligible for needs-based student income support in most undergraduate and some postgraduate courses.[51] To receive benefits students must satisfy a personal income test. If aged 21 years or less a parental income test also usually applies; for older students a partner income test applies, if relevant.

46 Primary visa holders only, including non-higher education students: ABS, *Personal income in Australia* (Australian Bureau of Statistics, 2022), table 9.1. As reported through tax returns and the PAYG system; unreported cash-in-hand payments are an issue in industries that employ students.

47 Calculated from ABS, *Education and Work, TableBuilder*.

48 SRC, *2022 Student Experience Survey: the international student experience*, p. 6.

49 Universities Australia, *2017 Universities Australia student finances survey,* pp. 19, 24.

50 Calculated from ABS, *Census of population and housing, 2021, TableBuilder Pro*. Comparison with the 2016 census showed a slight increase in living with relatives, possibly due to COVID-19 factors.

51 For a list see the *Student Assistance (Education Institutions and Courses) Determination 2019*. Available from legislation.gov.au. For historical student income support programs and statistics, see D. Daniels, *Student income support: a chronology* (Parliamentary Library, Parliament of Australia, 2017).

The main income support schemes are Youth Allowance, for students aged 24 years or less; Austudy, for students 25 years or more; and Abstudy for Indigenous students. Youth Allowance is the largest scheme. In June 2022, higher education student recipient numbers were Youth Allowance 146,832, Austudy 27,191 and Abstudy 4,657.[52]

Student income support payments vary with personal circumstances but are always low. The June 2023 maximum Youth Allowance payment for an 18-year-old living outside the family home is $562.80 a fortnight. Benefits are reduced if the student earns more than $480 a fortnight or their parents earn more than $58,108 a year. In a share house, a student on income support may be eligible for rent assistance of up to $104.80 a fortnight. Students on income support relocating for study from or to a regional or remote area can receive lump sum annual payments. These peak at $5,080 in the first year, with lower amounts in subsequent years.

In August 2021, 23.5 per cent of Australian citizen students received student income support.[53] Recipient numbers are in a structural decline that COVID-19 interrupted (Figure 18). Beneficiaries increased in 2020, when a special COVID-19 payment made student income support more financially attractive and eligibility levels were lifted by reduced student, parent and partner income during the COVID-19 recession.[54] By 2022, however, the downward trend in recipient numbers observed since 2017 had resumed. Data for early 2023 (up until May), which also included vocational education students, showed monthly recipient numbers were down on 2022.[55]

No in-depth research explains the decrease in student income support recipient numbers. Although official enrolment data is not available for 2022 or 2023 declining student numbers may be a factor for these, but not earlier, years (section 2.3). Apart from the COVID-19 period, increased employment opportunities and pay (section 3.7.1) may encourage some students to choose work over benefits.

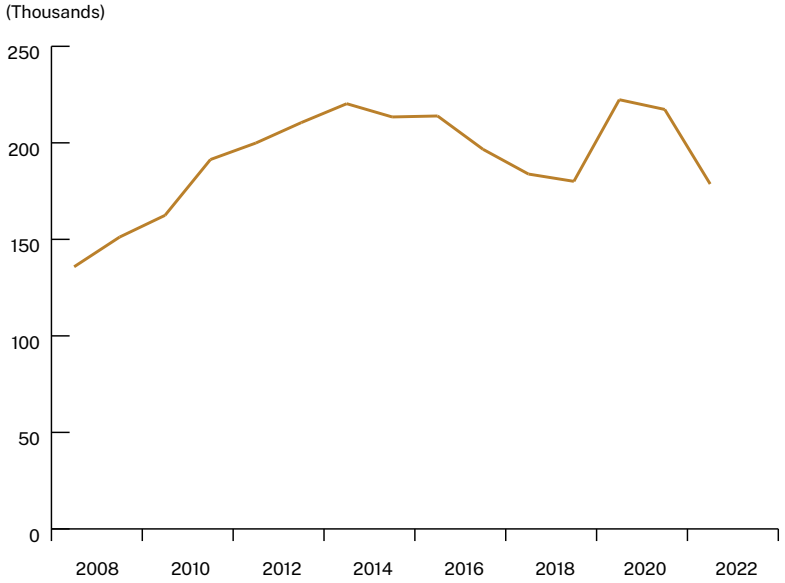
52 Data provided by the Department of Social Services.

53 Calculated from ABS, *Census of population and housing, 2021, TableBuilder Pro* using the linked administrative data described in footnote 38.

54 A. Norton, *Tertiary student finances under COVID-19* (ANU Centre for Social Research and Methods, 2022), pp. 12–15.

55 DSS, *DSS Income support recipients - monthly time series* (Department of Social Services, 2023).

Figure 18: Higher education student income support recipients, 2008–2022



Note: As of late-June in each year. Includes Youth Allowance, Austudy and Abstudy.

Source: Department of Social Services.

Income support recipients are also eligible for a twice-yearly lump sum Student Start-up Loan of $1,201 in 2023. In 2021–22, 91,600 students took out a loan.[56] This money is repaid after other student debt is cleared (see section 6.4.2 on student loans).

Since 2021, some regional students who move to study have been eligible for another lump sum benefit, the Tertiary Access Payment. It pays up to $5,000 for students who proceed straight from Year 12 to tertiary study. Its parental means test of $250,000 a year is much easier to satisfy than its student income support equivalent. In 2022, 3,461 payments were made.[57] The program aims to reduce delays in commencing higher education, which increase the risk that students will not finish their course.[58]

56 DSS, *Department of Social Services Annual Report 2021-22* (Department of Social Services, 2022), p. 46.

57 REC, *Regional Education Commissioner annual report 2022* (Australian Government, 2023), p. 80.

58 DESE, *Tertiary Access Payment program guidelines 2022-2024* (Department of Education, Skills and Employment, 2021).

3.7.4 Scholarships

Research students can receive merit-based stipends through the Research Training Program (see section 6.7.1 for more detail on the RTP). These stipends are funded by the Australian Government but allocated by universities. Universities decide on a stipend amount between a 2023 minimum base rate of $29,863 and a maximum of $46,653.[59] In 2020, 30 per cent of domestic research students received a stipend, which continued an upward trend.[60] In 2022, most universities offered stipends at or near the minimum amount, but some subsequently increased their rates.[61]

The 2017 survey of student finances found that 57 per cent of research students received a 'scholarship, stipend or bursary'.[62] This figure suggests that scholarships not funded by the RTP play a significant role in supporting research students.

A large number of smaller government, university and privately funded scholarship programs also help students finance their study. Many are aimed at disadvantaged groups. The Aurora Education Foundation lists 406 scholarships available to undergraduate Indigenous students.[63] These include Indigenous Commonwealth Scholarships designed to cover education and accommodation costs, which had 3,253 recipients in 2020.[64] The Country Education Foundation lists 820 scholarships for which regional students are eligible.[65] More than 40 scholarships are aimed at humanitarian migrants.[66] In 2017, 10 per cent of undergraduates reported receiving a scholarship, stipend or bursary.[67]

59 DofE, *Research Training Program* (Department of Education 2022).

60 2020 figure Department of Education, special data request. Earlier years: DofE, *Student equity in higher degrees by research: statistical report, August 2019* (Department of Education, 2020), pp. 11–12.

61 N. Garland and C. Belward, 'How are PhD students meant to survive on two-thirds of the minimum wage?', *The Conversation*, 20 June 2022. A number of universities subsequently announced increased rates: J. Ross, 'Australian PhD stipend increase sets off chain reaction', *Times Higher Education*, 3 January, 2023.

62 Universities Australia, *2017 Universities Australia student finances survey*, p. 22.

63 Aurora, *Indigenous pathways portal* (Aurora Educational Foundation, 2022). Not all of these are exclusively available to Indigenous students.

64 Department of Education, special data request. This number has declined each year from its peak of 4,623 in 2017.

65 CEF, *CEF scholarships guide* (Country Education Foundation of Australia, 2022).

66 RESIG, *University scholarships* (Refugee Education Special Interest Group, 2022).

67 Universities Australia, *2017 Universities Australia student finances survey*, p. 19.

3.7.5 Implications of financial situation

In 2017 over half of undergraduates agreed with the proposition that their financial situation was a 'often a source of worry' and 15 per cent went 'without food or necessities'.[68] Perhaps reflecting increased labour market income, the proportion reporting 'negative effects of financial circumstances on study' was slightly down over the 2017 to 2022 period, from 27 per cent to 25 per cent. In 2022, international undergraduate students were more likely than domestic students to say their financial circumstances affected their study negatively (33 per cent), but less likely to report negative effects from paid work (26 per cent).[69]

68 Ibid., p. 40.

69 SRC, *2022 Student Experience Survey: the international student experience*, p. 6.

3.8 Student mental health

Student surveys identify high rates of self-reported psychological distress.[70] The COVID-19 pandemic triggered a further deterioration in mental health.[71] A 2021 census question on clinically diagnosed health conditions found that 13 per cent of higher education students reported one relating to mental health.[72]

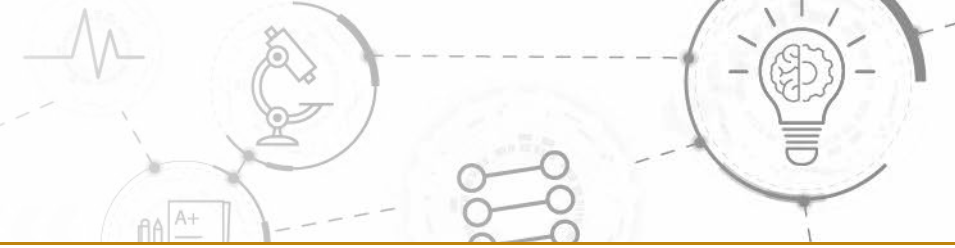
Data sources linking higher education enrolment and Medicare data show that worsening student mental health pre-dates COVID-19. In 2010, 10 per cent of higher education students used a mental health service funded under the Medicare Benefits Schedule (MBS). By 2016, this had risen to 15 per cent. The 2010 data omitted mental health medications funded under the Pharmaceutical Benefits Scheme (PBS). Including them for 2016 lifts clinically diagnosed mental health conditions to 21 per cent of students.[73]

70 Orygen, *Under the radar: the mental health of Australian university students* (Orgyen: The National Centre of Excellence in Youth Mental Health, 2017); findings and research cited in Productivity Commission, *Mental Health (Report no. 95)* (Productivity Commission, 2020), section 6.2.

71 D. Tuck et al., 'Distress of tertiary education students in Australia during the COVID-19 pandemic,' *Journal of Clinical Psychology* 79, no. 3 (2023); L. Vernon, K. Modecki and K. Austin, *Understanding well-being challenges for university students during crisis disruption* (National Centre for Student Equity in Higher Education, 2022); C. Forrest, *Treading water: effects of the COVID-19 pandemic on youth transitions* (National Centre for Vocational Education Research, 2022).

72 Calculated from ABS, *Census of population and housing, 2021, TableBuilder Pro*. A caveat to this data is that the question specified diagnosis by a doctor or a nurse, which read literally would exclude diagnosis by a psychologist.

73 DESE, *Completing higher education: Early usage of mental health services improves higher education students' success* (Department of Education, Skills and Employment, 2020).



Increases in mental health problems are a general social issue rather than being specific to higher education.[74] For students commencing higher education for the first time between 2012 and 2015, 13 per cent had previously had an MBS-financed mental health consultation or used a mental health medication funded under the PBS.[75] Rates of seeking professional assistance for mental health issues were lower in the first year of university than in the six months prior to commencement.[76] Up to age 23 for men and 22 for women, higher education students report lower rates of mental health diagnoses than other people their age.[77]

Mental health issues negatively affect the student experience. Of the nearly one in five undergraduates who seriously considered leaving their institution in 2022, half gave 'health or stress' as a reason.[78] A diagnosed mental health condition is associated with higher rates of course non-completion.[79] This can cause long-term loss of employment opportunities and income (section 10.3).

74 F. Botha and R. Wilkins, *The Household, Income and Labour Dynamics in Australia Survey: Selected findings from waves 1 to 19, the 17th annual statistical report of the HILDA survey* (Melbourne Institute of Applied Economic and Social Research, 2022), pp. 100–117.

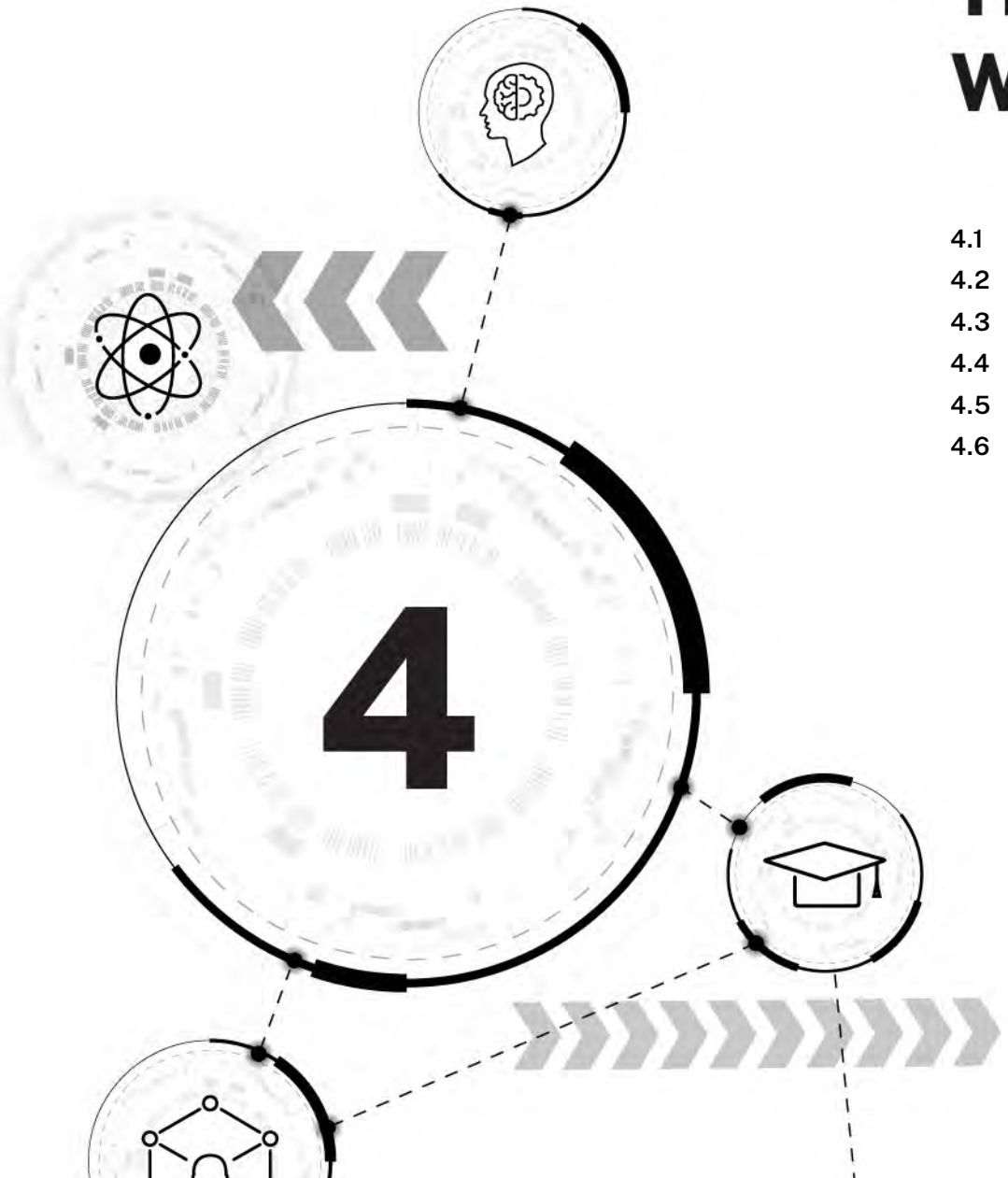
75 T. Zajac et al., *Intestigating the relevance of mental health for the current equity group framework: An analysis of multi-agency linked administrative data* (University of Queensland/ National Centre for Student Equity in Higher Education, 2022), p. 13.

76 DESE, *Completing higher education: Early usage of mental health services improves higher education students' success*, p. 2.

77 Calculated from ABS, *Census of population and housing, 2021, TableBuilder Pro*.

78 SRC, *2022 Student Experience Survey: the higher education student experience*, pp. 31–32.

79 DESE, *Completing higher education: Early usage of mental health services improves higher education students' success*; Zajac et al., *Intestigating the relevance of mental health for the current equity group framework: An analysis of multi-agency linked administrative data*



THE UNIVERSITY WORKFORCE

4 THE UNIVERSITY WORKFORCE

This chapter looks at the university workforce. It covers employment numbers, the differences between academic and non-academic staff, and the sector's high use of temporary employment contracts.

4.1 Employment in universities

In first semester 2022, university employment totalled 206,128, slightly up on 2021 but nearly 10 per cent below 2019 levels.[1] Universities cut staff as COVID-19 reduced international enrolments (section 2.4) and university revenue (section 6.1).

Job losses were greatest for casually employed staff, down 20 per cent between 2019 and 2021, although casual headcount statistics need to be used cautiously (casual academic staff are discussed in section 4.4).[2] After a 2.1 per cent increase in continuing or fixed-term contract staff between 2021 and 2022, their total of 125,214 was only one per cent below the 2019 number. On a headcount basis, they were 61 per cent of all staff in early first semester 2022.

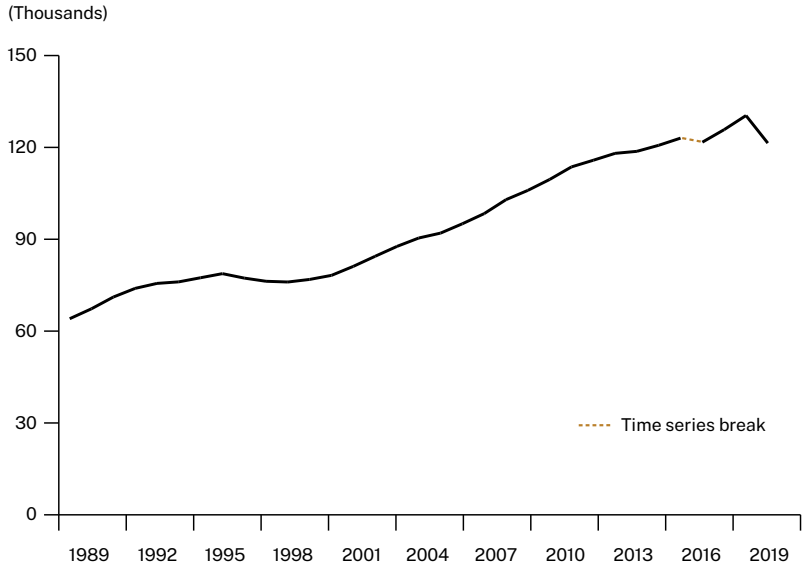
Using a different data source, Figure 19 reports continuing or fixed-term staff numbers from 1989 to 2021. Their employment reached a high of 130,414 in March 2020 before falling to 121,364 in 2021.[3] This decline was the first since the late 1990s and the largest year-on-year change recorded in a time series that begins in 1989. Despite COVID-19, however, universities in the early 2020s remained large employers by their own historical standards.

1 The numbers are calculated from institution-level data released by the Workplace Gender Equality Agency, for example, WGEA, *2022 WGEA data-public data file* (Workplace Gender Equality Agency/data.gov.au, 2023). This is census date data; the number of employees on a certain day. WGEA lets employers choose the date. For non-casual employees, Department of Education and WGEA staff statistics report similar numbers in years for which both have published data, suggesting that most universities used Education's required 31 March census date in both cases. Missing data from Murdoch's WGEA 2022 entry was filled using information from its annual report. Torrens University and the University of Divinity not included. This is not a unique person count since casual staff especially can be employed by more than one university. The latest published NUHEP employment data is from 2017: TEQSA, *Statistics report on TEQSA registered higher education providers 2019* (Tertiary Education Quality and Standards Agency, 2019), pp. 34–40.

2 Tertiary education payroll data shows that March is a peak month for pay transactions, suggesting that the average monthly number of casual employees would be lower: ABS, *Weekly payroll jobs and wages in Australia* (Australian Bureau of Statistics, 2023), industry subdivision table. Casual numbers reported by some universities also show significant year-to-year volatility, raising the possibility that census dates vary between years.

3 The comparable 2021 WGEA total was 122,604. Counts at different dates and varying practices in including staff employed by subsidiaries are among the explanations for differences.

Figure 19: Continuing and fixed-term staff in universities, 1989–2021



Note: The apparent decline in staff in 2018 was due to previous errors in reporting by one university.

Source: Department of Education, Higher education staff selected higher education statistics.

4.2 Entry into the academic workforce

Unsurprisingly, the main motivations for seeking academic work are intellectual. In a 2010 survey, more than 90 per cent of academics in Australian universities agreed that opportunities for intellectually stimulating work, passion for a field of study, and the opportunity to contribute to developing new knowledge drew them to academia.[4] A survey of research students in the same year had similar findings. Developing knowledge, along with the interest and challenge of academic work, were rated most highly as reasons to choose academic over other types of work.[5]

Most research students aspire to an academic job, although fewer see this as a realistic goal.[6] Increased research student enrolments (section 5.1) make the academic job market more competitive. PhD graduates from Australian universities compete in a global academic jobs market. Nearly half of 'university lecturers and tutors' in the 2021 census were migrants, compared to 32 per cent of all employees.[7]

4 Bexley, James and Arkoudis, *The Australian academic profession in transition*, p. 13.

5 D. Edwards, E. Bexley and S. Richardson, ***Regenerating the academic workforce: The careers, intentions and motivations of higher degree research students in Australia: Findings of the National Research Student Survey (NRSS)*** (Australian Council for Educational Research, 2011), p. 39.

6 Ibid., p. 22; P. Bentley, E. Bexley and M. Dollinger, *Mapping the external engagement of Australia's PhD candidates* (LH Martin Institute/Melbourne Centre for the Study of Higher Education, 2017), pp. 29–30. In another survey academic work was the most popular career choice at 49 per cent: P. McCarthy and M. Wienck, *Who are the top PhD employers?* (Australian Mathematical Sciences Institute/CSIRO, 2019), p. 11.

7 Calculated from ABS, *Census of population and housing, 2021, TableBuilder Pro.* Includes academics who arrived in Australia as children. 30 per cent of academics have arrived since 2001.

A PhD is not always essential for academic work but over time it has become more expected. Its desirability is most obvious for research work, but teaching staff now need a PhD or a qualification level above the course they teach, or possess equivalent professional experience.[8] In 1991, when many academics had started their careers in teaching-focused colleges of advanced education (section 1.3.1), less than half of all academics had a PhD; by 2021, nearly 75 per cent had one.[9] Some academic staff are enrolled in but yet to complete research qualifications.[10]

4.3 Continuing and fixed-term academic employment

The Australian academic workforce has a hierarchical structure, with the ascending ranks of Level A (tutors or associate lecturers), Level B (lecturers), Level C (senior lecturers), Level D (associate professor) and Level E (professor). Job titles can vary, with terms like 'research fellow' used for research-only staff.

In 2021, 51,828 continuing or fixed-term contract staff had academic job classifications and responsibilities, a 4.6 per cent drop from 2020. Most academics are employed to teach and research (56 per cent), or to research only (32 per cent; the research workforce is discussed in section 5.1). Teaching-only staff are the smallest (12 per cent) but fastest-growing part of the academic workforce.[11]

Academic staff in Australian universities are not tenured in the North American sense of a guaranteed job. Australian academics can be dismissed (although see section 1.3.4 on academic freedom). However, Australian academics with continuing rather than fixed-term employment enjoy generous redundancy provisions. If retrenched, long-serving academics can receive 15 to 18 months of their salary.[12] In 2021, 55 per cent of academic staff (not counting casuals) were on continuing contracts. At least to early 2021, continuing academic staff were relatively protected from COVID-19 job losses.

8 *Higher Education Standards Framework (Threshold Standards) 2021,* section 3.2.

9 *DofE, Staff: Selected higher education statistics 2021* (Department of Education 2022), table 4.2; DEET, *National report on Australia's higher education sector* (Department of Employment, Education and Training, 1993) p. 149.

10 Bexley, James and Arkoudis, *The Australian academic profession in transition*, p. 41.

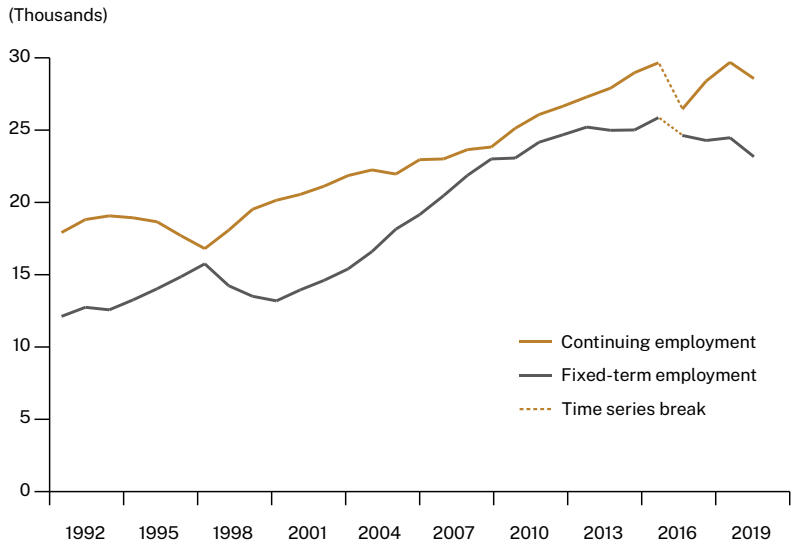
11 Calculated from DofE, *Staff pivot table* (Department of Education, 2022). Another 1,633 persons had academic job classifications but were not classified as having a teaching or research function.

12 E. Bare et al., *Does the COVID-19 emergency create an opportunity to reform the Australian university workforce?* (Melbourne Centre for the Study of Higher Education, 2021), p. 6.

Universities employ the other 45 per cent of non-casual academic staff on fixed-term contracts. They are entitled to separation payments in some circumstances but retrenching them costs much less than for continuing staff. This may be one reason why limited term employment grew this century, before stabilising and then declining in more recent years (Figure 20). Of the academics on fixed-term contracts, most (59 per cent in 2021) were in research-only positions. This reflects the time-limited nature of much research funding. The major research agencies – the Australian Research Council and the National Health and Medical Research Council – award project funding of up to five years only. A late-2010s decline in project funding probably explains the downward trend in fixed-term contract academics (section 6.7.1).

Younger academics are most affected by less secure employment. Up to age 40, academics with fixed-term contracts outnumber those with continuing employment.[13] Some build careers on successive short-term jobs. In 2019, 44 per cent of fixed-term contract employees had been on them for six years or more.[14]

Figure 20: Continuing and fixed-term academic staff, 1992–2021



Notes: Research-only staff holding jobs without academic classifications are excluded from this chart. The apparent decline in staff in 2018 was due to previous errors in reporting by one university.

Sources: Department of Education, Special data request 1992–2017, Staff PowerBI 2018–2021.

13 Calculated from DofE, *Staff: Time series PowerBI* (Department of Education 2022). Not including casuals.

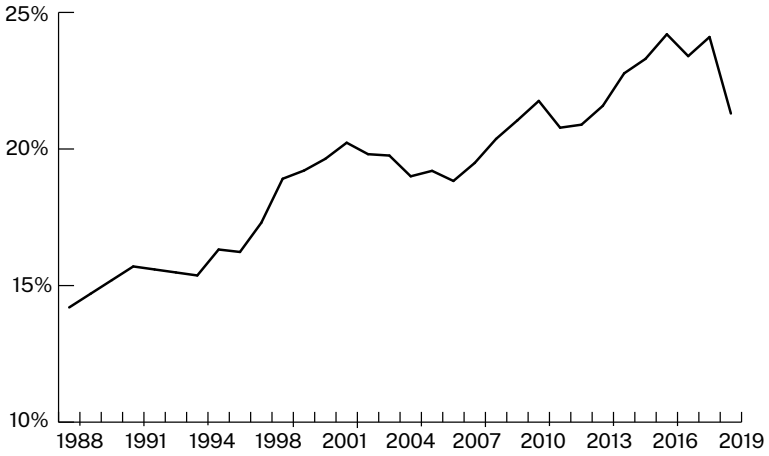
14 NTEU, *Issues paper: The growth of insecure employment in higher education* (National Tertiary Education Union, 2020), p. 8.

4.4 Casual academic employment

Casual academic jobs have become more common since the 1990s (Figure 21). On a full-time-equivalent basis, casual staff were 21 per cent of the university academic workforce in 2020, but a more typical pre-COVID-19 share was about 24 per cent.

Teaching work drove growth in casually employed academic casual staff between 2009 and 2019. Casual employment in research-only roles fell slightly. On a headcount measure most university teachers are casual employees.[15]

Figure 21: Casual employment as a share of the full-time-equivalent academic workforce, 1988–2020



Source: Department of Education staff data collection.

15 The WGEA casual numbers are not reported by function. In 2020, 61.7 per cent of casual FTE had a teaching, or teaching and research role: calculated from DofE, *Staff: Selected higher education statistics 2021*, appendix 1.15, which if indicative of headcount WGEA 2020 casuals would equal 58,305 teaching casuals. This FTE-headcount assumption will not be fully accurate and WGEA data has the issues described in footnotes 1 and 3. The plausible range of number of casual teaching jobs in first semester 2020 is mid-50,000s to low 60,000s. In 2015, an NTEU survey found that one in five casuals worked at more than one institution, so the WGEA figures double count some people. By comparison, 37,562 academics on continuing or fixed-term contracts had teaching responsibilities.

Most academic casuals (72 per cent on a full-time-equivalent basis in 2020) are employed at the most junior Level A academic rank. This compares to 17 per cent for academics with fixed-term or permanent contracts.[16] Casuals on relatively low hourly rates and employed only during semester keep university costs down.[17]

For students, casual teaching staff can offer expertise – often from professional practice – that full-time academics lack.[18] For aspiring academics studying for a PhD, casual teaching work helps them financially and provides career-relevant experience. A decade ago, about half of casually employed academics were also students, mostly in PhD programs.[19]

While casual employment suits some staff, for others low pay and job insecurity produce frustration. Some academics are employed casually for long periods. Of the casual staff responding to a 2019 union survey, 46 per cent reported working on a casual or sessional basis for six years or more. Most casuals did not believe that their work was genuinely of an occasional or short-term nature, with 59 per cent agreeing with the proposition that their work was needed on an ongoing basis.[20]

Universities do not always manage their casual workforce well. Union and media reports have highlighted multiple cases of underpaid university casual employees.[21] In 2022, the Fair Work Ombudsman announced that the university sector was a 'new compliance and enforcement priority'.[22]

4.5 Academic pay and job satisfaction

For research students, pay is an aspect of work life that they believe will be worse in academia than in alternative careers.[23] While stipends for research students are low (section 3.7.4), academics earn more than most other workers. In the 2021 census, nearly 80 per cent of 'university lecturer' employees working full-time reported an income of $2,000 a week or more, compared with 30 per cent of all full-time workers. Nineteen per cent reported earnings of $3,500 a week or more.[24] Professors earn more than $200,000 a year when including superannuation.

16 Ibid., appendix 1.17.

17 While some universities teach throughout the year, most have long mid-year and summer breaks, making full-time teaching-only staff expensive. Universities Australia, *Summary of 2023 principal academic dates for Australian universities* (Universities Australia, 2023).

18 R. May, D. Peetz and G. Strachan, 'The casual academic workforce and labour segementation in Australia,' *Labour and Industry* 23, no. 3 (2013), p. 264.

19 Bexley, James and Arkoudis, *The Australian academic profession in transition*, p. 38; G. Strachan et al., *Work and careers in Australian universities: Report on employee survey* (Centre for Work, Organisation and Wellbeing, Griffith University, 2012), p. 59.

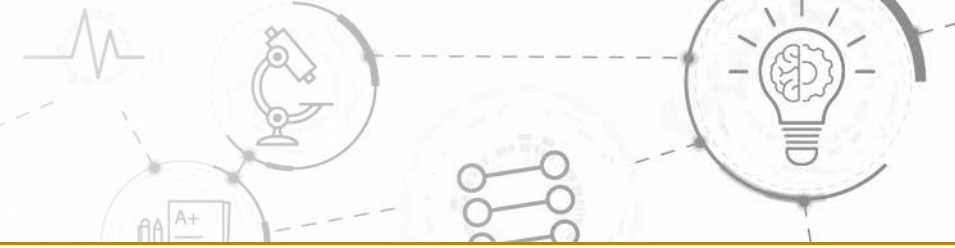
20 NTEU, *Issues paper: The growth of insecure employment in higher education*, pp. 6–7.

21 NTEU, *NTEU wage theft report* (National Tertiary Education Union, 2023).

22 FWO, 'FWO announces 2022-23 priorities', *Fair Work Ombudsman media releases*, 22 June 2022.

23 Edwards, Bexley and Richardson, *Regenerating the academic workforce: The careers, intentions and motivations of higher degree research students in Australia: Findings of the National Research Student Survey (NRSS)*, p. 39.

24 Full-time defined as 35 hours a week or more. Calculated from ABS, *Census of population and housing, 2021, TableBuilder Pro.*



While high incomes from academic work are possible, for the reasons described earlier, academic careers are high risk. If younger PhD graduates find academic work it is typically in casual or fixed-term contract jobs, with less job security than their university-educated contemporaries in other professions. The academic workforce has become more polarised in rank as well as employment security, with the lowest (level A) and highest (levels D and E) increasing their share of full-time-equivalent employment between 2000 and 2020.[25]

Surveys of academics since the early 1990s reveal issues with academic job satisfaction.[26] In 2022, only 57 per cent of early-career science researchers were satisfied with their jobs.[27] The National Tertiary Education Union (NTEU) conducts regular surveys of academics but has not recently reported them in detail. In 2017, it found 77 per cent agreed with the proposition that 'my work gives me satisfaction'. But this may be satisfaction with their core academic work, rather than their overall employment. The same survey showed dissatisfaction with workloads, lack of promotion, and senior management.[28]

4.6 Non-academic staff

Continuing or fixed-term contract academic staff are outnumbered by the 67,900 employees with non-academic job classifications. They were known as 'general' staff, but 'professional' staff is now preferred. Like academics their job classifications have a hierarchical structure. Professional staff below senior management are described in industrial documents as 'higher education workers' from levels 1 to 10. A 'HEW 10' is the most senior.

According to a common belief, non-academic staff are a growing share of the university workforce.[29] But for permanent and fixed-term contract employees, the non-academic share of the total workforce has been stable at around 57 per cent for at least the past 33 years, on a full-time-equivalent basis. Earlier data sources suggest that this share may go back nearly 60 years.[30] Although most COVID-19 job cuts were to the non-academic university workforce, their 2021 employment share of 56.9 per cent remained in this narrow historical range.

25 DofE, *Staff: Selected higher education statistics 2021;* DESE, *uCube - Higher education statistics*. Level A: 27 per cent in 2000, 31 per cent in 2020; levels D and E: 18 per cent in 2000, 25 per cent in 2020.

26 See the sources cited at Norton, Cherastidtham and Mackey, *Mapping Australian higher education 2018*, p. 40.

27 N. Jones, 'Early-career researchers in Australia are miserable at work', *Nature*, 23 January 2023.

28 NTEU, *2017 state of the uni survey: report 1, overview*, pp. 16–17.

29 For example, Forsyth, *A history of the modern Australian university*, chapter 7.

30 DofE, *Staff: Selected higher education statistics 2021*, table 1.2 and predecessor publications. The same share appears in the early-to-mid-1980s: DEET, *National report on Australia's higher education sector,* p. 137. For full-time staff only, the 57 per cent was also recorded in the mid-1960s: CBCS, *Social statistics Australia, no. 54: Universities preliminary bulletin, staff 1967 and finance 1966* (Commonwealth Bureau of Census and Statistics, 1967).

Although overall employment shares are stable, support staff levels have declined, and managerial staff have increased.[31] This has contributed to complaints about 'managerialism' (section 1.3.5).

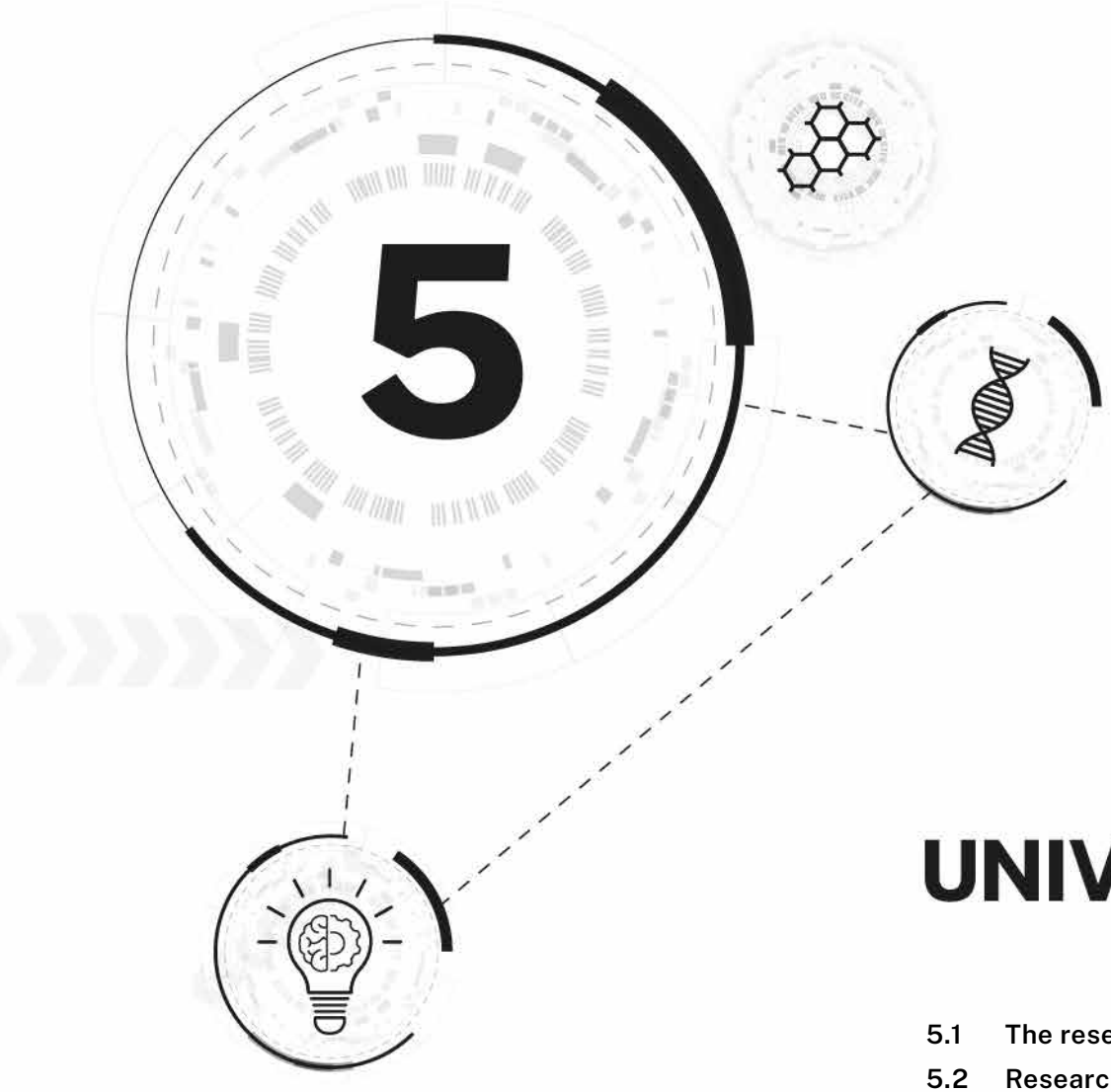
No data source provides a satisfactory account of the work done by non-academic higher education staff. Official university statistics describe non-academic employees according to their rank and where they work in the university, not their role. Apparent trends may reflect organisational changes rather than real shifts in resource allocation. Outsourced work does not appear in the statistics while job classifications do not necessarily describe daily duties.[32]

With these caveats, on a full-time-equivalent basis, 24 per cent of continuing and fixed-term contract university staff in 2021 worked in central administration and general services, which includes managing and maintaining buildings, IT, cleaning and security, as well as general administrative work. Another 19 per cent of staff on these contracts work in non-academic roles in faculties and departments. Ten per cent work in learning support services such as libraries, and 4.5 per cent work in student welfare services, such as health and counselling.[33]

31 G. Croucher and P. Woelert, 'Administrative transformation and managerial growth: a longitudinal analysis of changes in the non-academic workforce at Australian universities,' *Higher Education* 84, no. 159-175 (2022).

32 For example, some people with academic titles are primarily administrators, while some non-academic staff are 'research only' (section 5.1) or work in teaching-focused 'learning design' teams.

33 Calculated from DofE, *Staff: Selected higher education statistics 2021*, table 1.10 with non-academic staff in faculties and departments identified from DofE, *Staff pivot table.*



UNIVERSITY RESEARCH

5 UNIVERSITY RESEARCH

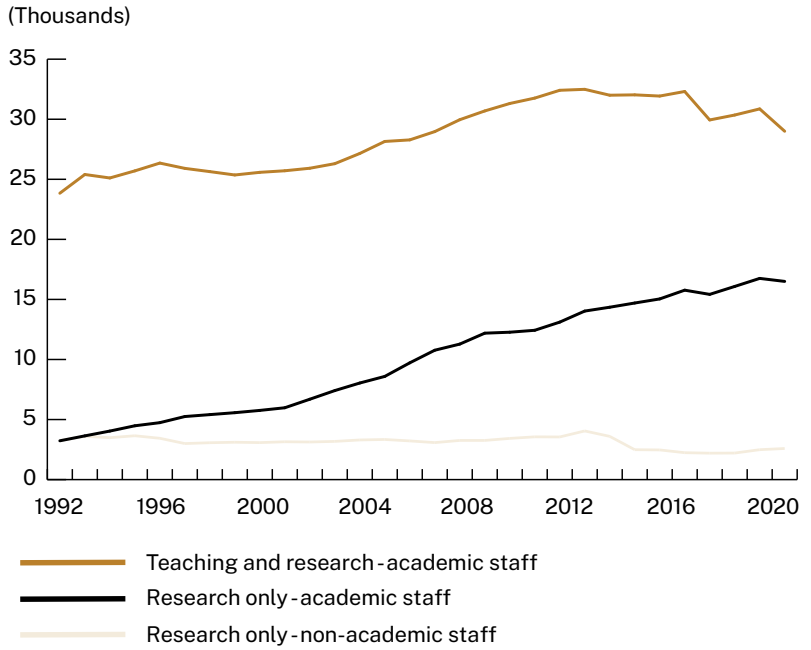
Research is a central activity of universities. Without it, they could not use the 'university' title. The research workforce and research output have both increased significantly over the past 20 years. Research can address practical problems or goals, or advance knowledge as an end in itself.

5.1 The research workforce

The higher education research workforce overlaps with, but is not the same as, the academic workforce described in chapter 4. This is mainly due to research students, but also because academics with teaching-only positions are excluded, while research-only staff with non-academic classifications are included.

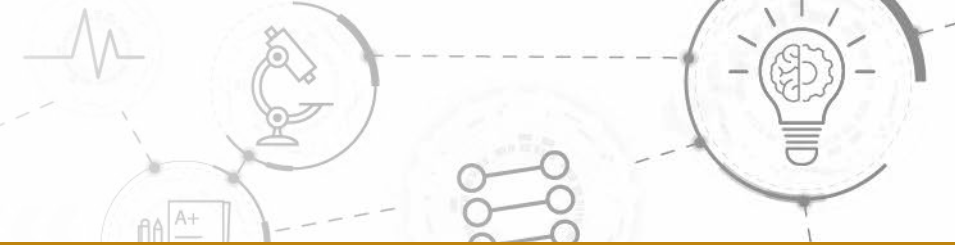
In 2021, 45,501 academics with continuing or fixed-term positions had a research, or a teaching and research, function (Figure 22). With non-academic research support staff added, the university research workforce was 48,087. The total fell by four per cent between 2020 and 2021, reflecting financial losses from fewer international students. The job losses were mostly in teaching and research positions, increasing the proportion of research academics with a research-only role to 36 per cent of the research workforce. This figure was 12 per cent in 1992.

Figure 22: Teaching and research staff, and research-only staff, 1992–2021



Note: The apparent decline in staff in 2018 was due to previous errors in reporting by one university.

Sources: Special data request from the Department of Education and the Staff pivot table.



Universities do not pay all research staff. A third of research outputs in the 2011 to 2016 period included a contribution from a person who volunteered, such as an emeritus professor or an honorary fellow, or who was employed by another organisation, such as a medical research institute.[1] Universities also have more than 2,300 international staff exchange agreements.[2]

Research students are another source of unpaid or low-paid research labour. Including international students, who make up 36 per cent of enrolments, 64,884 research students were enrolled in 2021.[3] This was a five per cent decline on the research degree enrolment peak in 2019 (Figure 23). International students being unable to enter Australia and practical obstacles for some research projects under COVID-19 restrictions may have affected enrolments.[4] In 2021, 8,412 PhDs were completed, along with 1,455 masters by research degrees; the total of the two was 10 per cent down on the 2019 peak.[5] COVID-19 factors may have delayed completions.

On both a headcount and full-time-equivalent basis, postgraduate research students outnumber university staff with research job descriptions. On ABS figures, in 2020, 55 per cent of all research and development 'person years of effort' in higher education institutions came from postgraduate students.[6]

Collaborative arrangements supplement Australia's university research capacity. Of Australian businesses collaborating for innovation, 7.6 per cent did so with universities in the two years to 30 June 2021, which is equivalent to approximately 9,500 businesses.[7]

1 ARC, *State of university research 2018-19: ERA national report* (Australian Research Council, 2019).

2 Universities Australia, *International links (member universities)* (Universites Australia, 2023).

3 DofE, *Student enrolment pivot table.*

4 An implication of the increased stipends paid to research students (section 3.7.4) supported by a fixed pool of research student funding (section 6.7.1) is that fewer students can be supported.

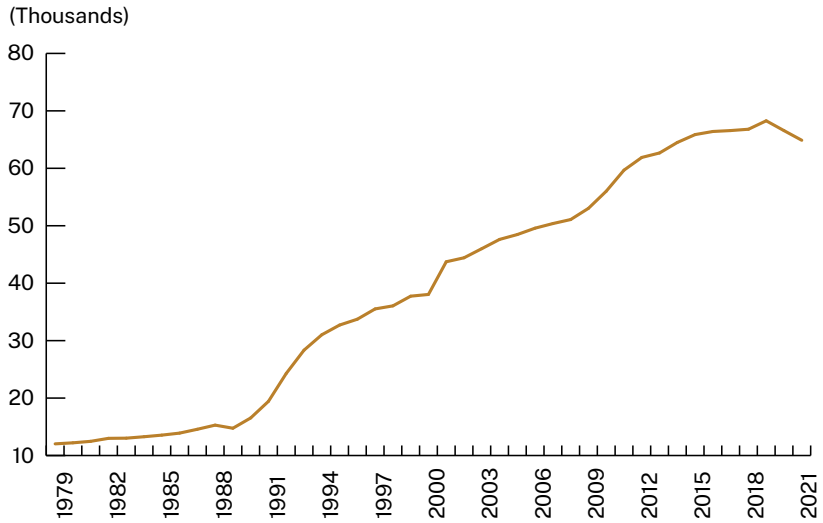
5 DofE, *Students: Selected higher education statistics 2021*, table 14.1.

6 ABS, *Research and experimental development, higher education organisations, Australia, 2020* (Australian Bureau of Statistics, 2022). Person years of effort is analogous to full-time-equivalent in the higher education data collection.

7 ABS, *Innovation in Australian business 2020-21* (Australian Bureau of Statistics, 2022).

In 2020, Australian universities had nearly 5,300 academic or research collaboration agreements with higher education institutions overseas, up from just over 3,000 in 2003 but down on more recent years.[8] In the 2008 to 2014 period, more than half of Australian scientific publications had an international co-author.[9] Increased government concern about 'foreign interference' makes some international collaboration more difficult than previously.[10] Some university 'foreign arrangements' can be vetoed by the Minister for Foreign Affairs.[11]

Figure 23: Enrolments in research degrees, 1979–2021



Sources: Department of Education: Time series data 1949–2000; uCube; Student enrolment pivot table.

8 Universities Australia, *International links (member universities).*

9 UNESCO, *UNESCO science report: towards 2030* (United Nations Educational, Scientific and Cultural Organisation, 2016), p. 790.

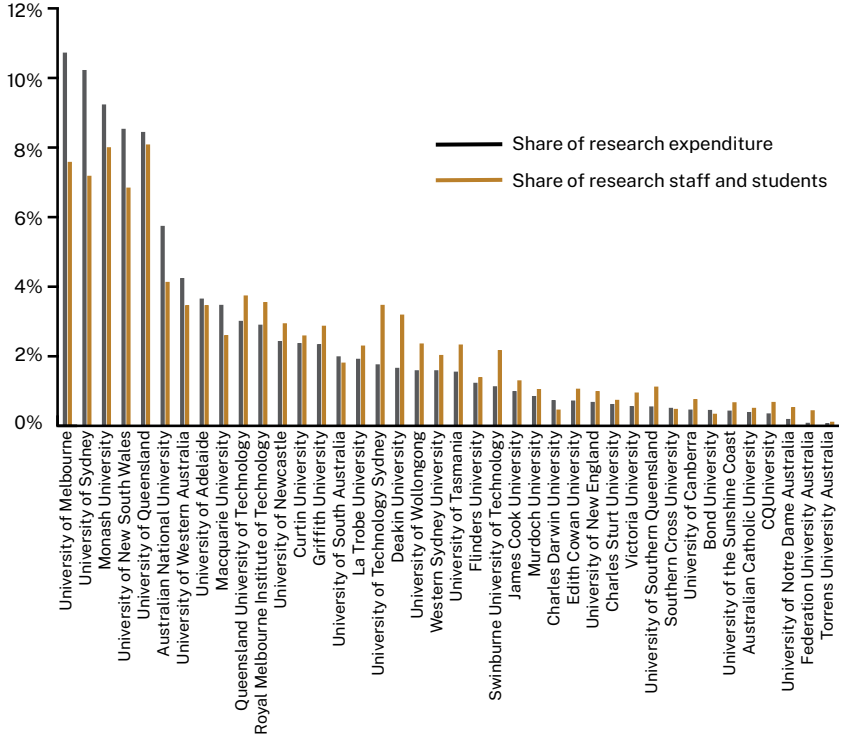
10 UFITSG, *Guidelines to counter foreign interference in the Australian university sector* (University Foreign Interference Taskforce, made up of the Australian Government, Universities Australia and the Group of Eight, 2021).

11 DFAT, *Foreign arrangments scheme* (Department of Foreign Affairs and Trade, 2022).

5.2 Research capacity by university

Although every university must be active in research (section 1.3.1), in practice research activity is concentrated. In 2020, members of the research-intensive Group of Eight universities (see Appendix A) reported more than 60 per cent of all research expenditure and nearly half of all research human resources, counting both staff and research students (Figure 24). The differences between these figures reflect Group of Eight dominance of the more expensive research fields, such as health, science and engineering. Differences in the average time academics with teaching and research responsibilities spend on research may also affect the results.

Figure 24: Human and financial research capacity by university, 2020



Note: Full-time-equivalent staff and students. Teaching and research staff counted as 0.4 on a full-time-equivalent basis, in line with common time allocations.

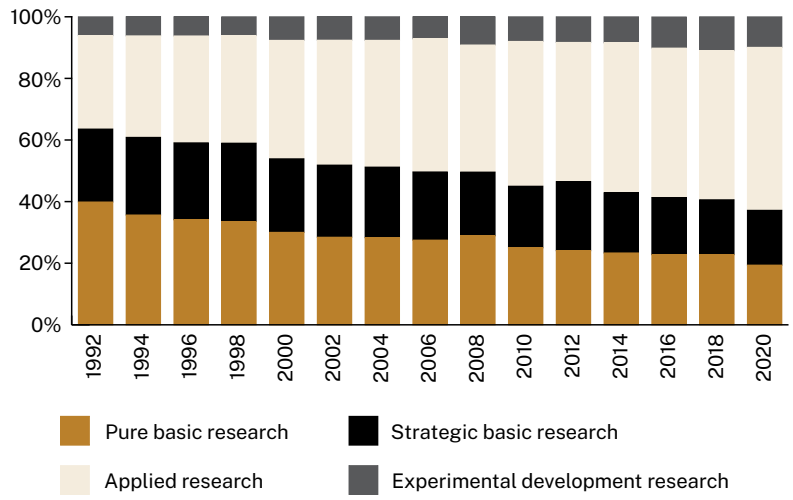
Sources: ABS, Research and experimental development, higher education institutions; Department of Education, Student load pivot table; Department of Education, Staff pivot table.

5.3 Research topics and types

Research spending in Australia is strongly skewed towards scientific and technology disciplines, and especially medical science. Medical and health research accounted for 32 per cent of higher education research spending in 2020, with other sciences, engineering and IT together responsible for 43 per cent. About 10 per cent of research spending was on the humanities.[12]

Research is classified using OECD categories according to its approach to knowledge as well as its field. As Figure 26 shows, 'pure basic research', the pursuit of knowledge without looking for long-term benefits other than advancing knowledge, has halved as a proportion of all research spending since 1992. With total university research spending increasing substantially (section 6.7), however, basic research spending increased in real terms until 2012. In 2020 it was at about 2008 levels.[13] The shift has been to applied research, a category covering research aimed at finding possible uses for basic research or new ways of achieving specific and predetermined objectives. Government policy has encouraged this trend (section 6.7.1).

Figure 25: Research expenditure by type, 1992–2020



Source: ABS, Research and experimental development, higher education institutions.

12 ABS, *Research and experimental development, higher education organisations, Australia, 2020.*

13 Ibid. and preceding years.

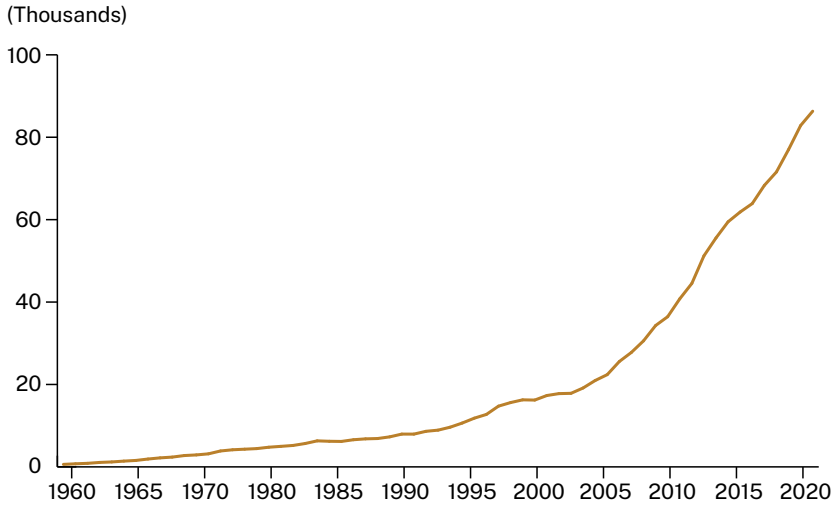
5.4 Research outputs

Publications are the main academic research output, but research evaluation exercises accept 'original creative works' such as sculpture, music, exhibitions, and films.[14] For the period 2011 to 2016, universities submitted 506,294 research outputs for evaluation in Excellence in Research for Australia (ERA) 2018 (for quality assessment, see section 9.3). Journal articles were the most common research output, at 74 per cent of all those submitted.[15]

Growth in research staff and students (section 5.1) have contributed to large increases in research output. In the first ERA, covering the 2003 to 2008 period, 333,093 research outputs were submitted, indicating a 52 per cent increase in less than a decade.[16] Figure 26, which shows trends in research journal articles with at least one author with an Australian university affiliation shows continued rapid growth. In 2022 86,323 articles were published, more than double the 2011 figure.

Research staff and student losses in recent years, new political obstacles to international research collaboration, and likely lower teaching profits constraining research expenditure (section 6.7.2) may constrain future growth in publications. However, no downward trend is yet evident in output statistics.

Figure 26: Research journal articles with one or more Australian university affiliated author, 1960–2022



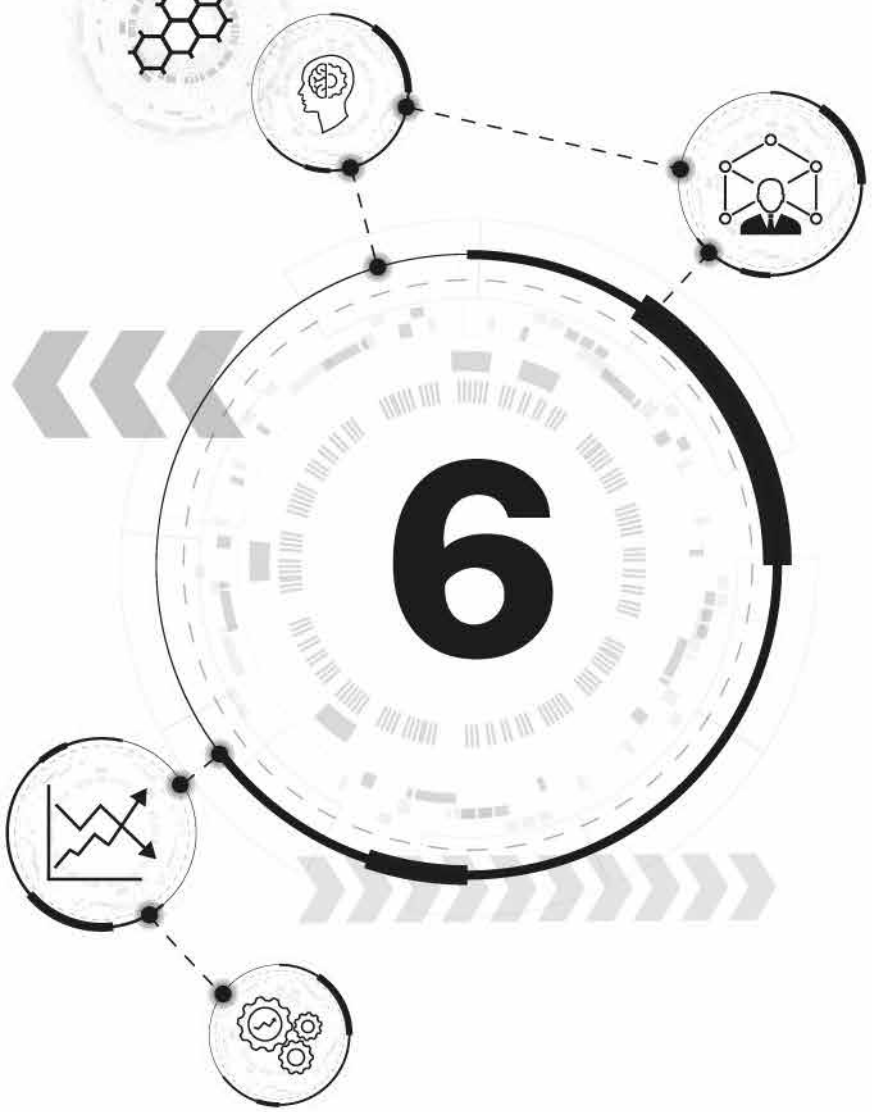
Note: The search was limited to organisations or faculties that included an Australian university name. Faculty names without a specified university and medical research institutes, which often have university affiliated staff, were excluded.

Source: Scopus database.

14 ARC, *ERA 2018 submission guidelines* (Australian Research Council, 2017), pp. 35–39.

15 ARC, *State of university research 2018-19: ERA national report*.

16 ARC, *Excellence in Research for Australia 2010: National report* (Australian Research Council, 2011), p. 212.



6

HIGHER EDUCATION FINANCE – OVERVIEW AND THE MAIN REVENUE SOURCES

6 HIGHER EDUCATION FINANCE – OVERVIEW AND THE MAIN REVENUE SOURCES

This chapter looks at higher education sector revenue sources and the main funding programs. The following chapter describes how courses are priced and how funding is distributed between universities.

6.1 University revenue and expenses

In 2021, revenue for public universities was $38.4 billion. Deducting $33.1 billion in expenses left an operating surplus of $5.2 billion, the largest ever.[1] This strong result was due to Chinese international students studying online (despite fewer onshore international students, section 2.4), lower costs after staff cuts (section 4.1) and other expenditure reductions, once-off government COVID-19 financial assistance (sections 6.4.1 and 6.7.1) and high investment earnings.

Despite volatility in specific income sources, total sector revenue increased in real terms every year except one, 2020, in the 1989 to 2021 period shown in Figure 27. Most universities that had released 2022 annual reports by June 2023, however, reported deficits. These will produce a second sector-level real decrease in total revenue and the first overall operating loss in the 1995–2022 period.[2] Most factors producing the 2021 surplus reversed themselves in 2022, with reduced domestic student demand also a factor.[3]

University and to a lesser extent NUHEP revenue sources are documented in this chapter. Publicly available data on their expenditure is more limited. Routine financial reports focus on what money was spent on, not why it was spent. Employee salaries and benefits are always the largest university expense, at 58 per cent of costs in 2021.[4] High-level expenditure patterns can be inferred by combining sources. In 2020, 51 per cent of university expenditure was on teaching and scholarship, and 37 per cent was on research, leaving 12 per cent for other activities.[5]

1 DofE, *Finance 2021: Financial reports of higher education providers* (Department of Education, 2023).

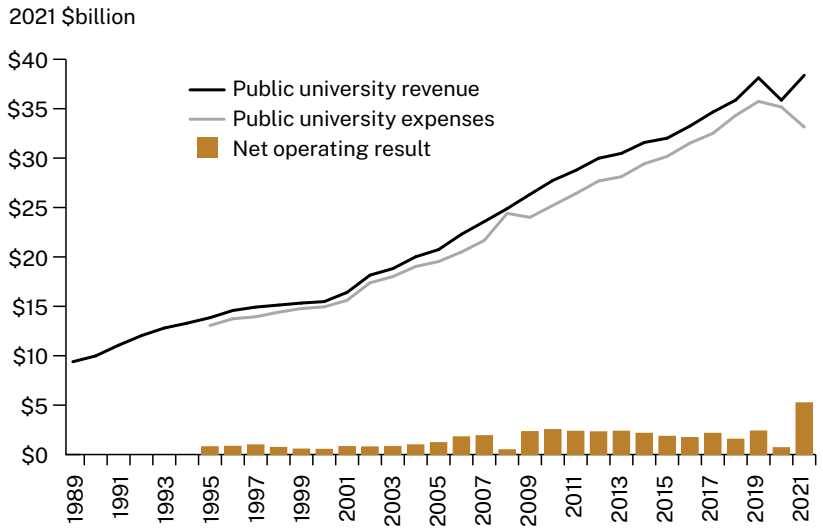
2 At the time of writing 35 public universities had released their 2022 results, with 25 reporting deficits. The total net losses are too large for the three yet-to-report universities to reverse the conclusion of a sector-level net loss for 2022.

3 The most detailed summary to June 2023 is NSW Audit Office, *Universities 2022: Financial audit 31 May 2023.*

4 DofE, *Finance 2021: Financial reports of higher education providers.*

5 Teaching and scholarship: Deloitte Access Economics, *Transparency in higher education expenditure: 2022* (Deloitte Access Economics/Department of Education and Training, 2022), pp. 31–32. Research: Total research expenditure as reported in ABS, *Research and experimental development, higher education organisations, Australia, 2020* as a percentage of total expenditure in DofE, *Finance 2020: Financial reports of higher education providers* (Department of Education, 2021). Given the limitations of these measures of expenditure and the overlap between 'scholarship' and 'research', double counting is possible with consequent greater spending on other university activities.

Figure 27: Public university revenue and expenses, 1989–2021



Notes: Indexed using CPI. The 2008 expenses spike was due to investment losses in the global financial crisis. Investment returns were also a factor in the 2020 to 2021 volatility. The University of Notre Dame is included in this time series from the year 2000.

Source: Department of Education, Financial: Financial reports of higher education providers.

At the end of 2021, public universities reported assets of $102.6 billion and net assets of $69.7 billion. The largest single asset class was buildings, valued at $35.3 billion.[6]

In 2021, private university revenue was $512.1 million, with expenses of $449.4 million.[7] Limited information is released on non-university higher education provider finances.[8] For 2020 and 2021, TEQSA assessed an increasing share of providers as at 'moderate' or 'high' financial risk.[9] About 40 per cent of NUHEPs depend on the international students prevented from entering Australia in those years (see section 1.2 on NUHEPs). As of June 2023, however, no NUHEPs had triggered involvement of the government's Tuition Protection Service, which arranges alternative courses or refunds for students of failed higher education providers.

6 *DofE, Finance 2021: Financial reports of higher education providers*. Including the University of Notre Dame.

7 Ibid., excluding Avondale University which is not yet in this data collection.

8 An annual summary of their revenue ceased publication. In 2016–17, excluding TAFEs, non-university higher education providers had revenues of $3.9 billion: TEQSA, *Statistics report on TEQSA registered higher education providers 2018* (Tertiary Education Quality and Standards Agency, 2018), p. 45.

9 TEQSA, *Key findings from the 2021 risk assessment cycle* (Tertiary Education Quality and Standards Agency, 2022), pp. 5–6. The totals include universities but the numerically dominant NUHEPs drive the overall results.

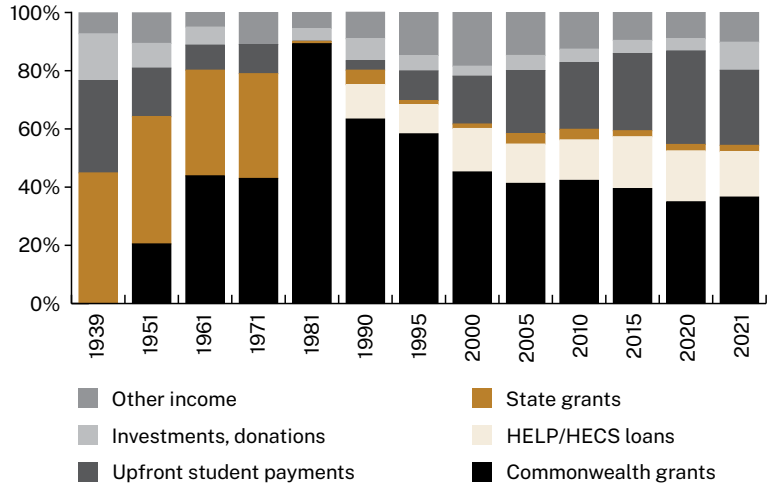
6.2 Public and private revenue sources

Universities are funded from public and private sources. Their respective shares have two distinct phases over the past 80 years, as Figure 28 shows. Until the late-1980s, public funding complemented and then replaced income from students, pushing up the government share of all university revenue. From 1974 to 1988, higher education was free of tuition charges for domestic students.[10]

From the late-1980s, public funding continued to increase in most years (sections 6.4.1 and 6.7.1). However, private funding usually grew more quickly. From the mid-1980s, universities could charge international students and some domestic postgraduates unregulated fees. Student charges were reintroduced in 1989 for government-supported students. These changes pushed government spending down as a share of all university revenue.

Despite increased private funding universities remain reliant on government. In 2021, 54.4 per cent of university revenue – counting both grants and student loans – came from public sources.[11]

Figure 28: Public and private revenue shares of universities, 1939–2021



Note: Upfront student payments include fees and HECS or student contribution payments.

Sources: Department of Education, Employment and Training, National Report on Australia's Higher Education Sector (1993). Department of Education, Finance: Financial reports of higher education providers (various years).

10 A. Norton, *From private to public benefit: The shifting rationales for setting student contributions* (Melbourne Centre for the Study of Higher Education, 2022), p. 8.

11 Australian Government grants, 36.6 per cent; HELP loans, 15.6 per cent; state government grants, 2.2 per cent.

6.3 Overview of public funding

Commonwealth financial support for higher education takes four main forms:

- grants to higher education institutions, primarily for teaching (section 6.4.1)
- student loans mostly paid to higher education institutions on behalf of students borrowing for tuition and other costs (section 6.4.2)
- student income support payments paid directly to students (section 6.5)
- grants to higher education institutions for research (section 6.7.1).

No official summary of Commonwealth higher education financial support exists. Table 2 provides an overview but needs significant caveats. The available financial data is organised around government departments, programs and legislation that do not always map neatly onto higher education as an activity or industry. Financial support includes grants and loans; the latter will be partly repaid, and so net support is lower than the total in Table 2. The source documents use both financial and calendar year bases; the latter is averaged here.

The focus of Table 2 is on recurrent programs for current higher education support purposes. It omits minor grants from government agencies other than the Department of Education, higher education-related payments to organisations other than higher education providers, contractual payments to universities for services delivered to government, legacy superannuation costs, and public service administrative expenditure.

With these provisos, Commonwealth cash flow to higher education institutions and students in 2021–22 was approximately $22.2 billion. Of this $15.3 billion was grants. Total outlays were offset by HELP repayments of $5.6 billion.

Table 2: Overview of Commonwealth financial support for higher education institutions and students, 2021–22

Category	Sub-category	Description	$ billion
Teaching-related grants ($7.9 billion)	Funding for Commonwealth-supported students	Commonwealth Grant Scheme	7.28
		Transition funding for Job-ready Graduates	0.35
		NPILF	0.23
Student loans ($6.95 billion)	Income-contingent loans (averaged calendar year)	HECS-HELP	4.68
		FEE-HELP	1.94
		Student Start-up	0.16
		SA-HELP	0.12
		OS-HELP	0.05
Income support ($2.5 billion)	Youth Allowance	Living expenses for students aged 16–24 years	1.74
	Austudy	Living expenses for students aged 25 years or more	0.59
	Abstudy	Living expenses for Indigenous students	0.15
Equity programs delivered by universities ($0.36 billion)		Indigenous Regional and Low SES Attainment Fund; programs for Indigenous students; disability support	0.36

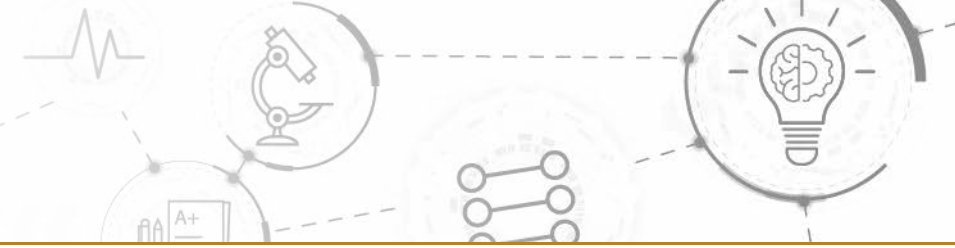
Category	Sub-category	Description	$ billion
Research grants ($4.5 billion)	Project grants (averaged calendar year)	Australian Research Council	0.74
		National Health & Medical Research Council	0.70
		Medical Research Future Fund	0.28
		Other Commonwealth competitive grants	0.26
	Block grants (averaged calendar year)	Research Training Program	1.07
		Research Support Program	1.43
Other minor grants ($.1 billion)			0.10
Total			**22.23**

Notes: Youth Allowance, Austudy and Abstudy expenditure is estimated based on the share of recipients in higher education in June 2022. The table excludes state and local government spending. NHMRC and MRFF spending is on universities only.

Main sources: Portfolio Budget Statements 2022–23 for the Department of Education and the Department of Social Services; Department of Education, Higher Education Research Data Collection, Research Block Grant Time Series, and Funding determinations.

6.3.1 Institutional eligibility for Commonwealth funding assistance

Registration by TEQSA to deliver higher education (chapter 1) does not of itself create any funding entitlements. It is a necessary but not sufficient condition of Commonwealth assistance. Higher education providers are eligible for varying types of assistance depending on their status in the *Higher Education Support Act 2003.*



The form of Commonwealth assistance used by the largest number of providers is the FEE-HELP student loan scheme. Any TEQSA-registered institution can apply for FEE-HELP (discussed in 6.4.2). This is a rule-driven higher education provider funding program, where an institution that meets set criteria is approved. NUHEPs and their students are the main beneficiaries of rule-driven access to FEE-HELP. The list of NUHEPs approved for FEE-HELP (Appendix A) changes regularly.

NUHEPs can, if listed in guidelines, receive Commonwealth teaching subsidies for 'national priority' courses, outcomes or students. This happens at the Minister for Education's discretion. Only five NUHEPs regularly receive support, although in recent years larger numbers have obtained short-term funding (see section 7.2).

Eligibility for other Commonwealth student and block grant research funding programs is restricted to institutions specifically named in the *Higher Education Support Act 2003*. Which institutions are named is due to history, precedent and politics rather than legally defined characteristics. They are listed on Tables A and B of the legislation. These lists change only occasionally.

The 39 institutions named on Table A are eligible for all teaching and student loan programs (section 6.4.2), equity programs (section 6.6) and research assistance (section 6.7.1). Except for the University of Notre Dame, Table A institutions can trace their origins back to organisations that were publicly funded by the late-1980s. The 38 Table A universities are often described as 'public universities', including for convenience in this report, although this is not a legal category or a precise term. The University of Notre Dame and the Australian Catholic University are on Table A but were not government initiatives. The Batchelor Institute of Indigenous Tertiary Education is on Table A but is not a university.[12]

Table B listing entitles institutions to FEE-HELP and research funding. Table B institutions can, like NUHEPs, receive 'national priority' funding for student places. Bond University, the University of Divinity, and Torrens University are currently on Table B. Although university status does not guarantee Table B listing, historical precedent suggests that new universities will be added. Avondale University, which became a university in 2021, will join Table B in 2024 with bipartisan support.[13] Table B institutions are often called 'private universities'.

12 In practice Batchelor delivers higher education courses in collaboration with Charles Darwin University, with its student funding managed by the university since 2012.

13 Morrison Liberal government legislation to add Avondale to Table B lapsed with the 2022 federal election. The Albanese Labor government reintroduced the legislation which passed in June 2023.

Another institutional list, Table C, gives FEE-HELP to students in higher education providers operating in Australia but controlled from overseas. As with Table B, listing is not automatic but both institutions ever recognised by TEQSA as 'overseas universities' were listed on Table C. One institution is listed as of mid-2023 but it is withdrawing from Australia.

Open Universities Australia (section 1.4), which is owned by seven Table A universities but is not a separately registered higher education provider, is authorised in the funding legislation to offer FEE-HELP loans for subjects offered by its partner organisations. It has its origins in early-1990s university access schemes.[14]

Eligibility for research project grants (section 6.7.1.1) is not formally linked to Table A or B listing but heavily overlaps. For the Australian Research Council (ARC), the list of eligible higher education providers is identical to Tables A and B. Organisations with appropriate health research capacity can apply to the National Health and Medical Research Council (NHMRC) or the Medical Research Future Fund (MRFF) for project funding. In practice all universities except the University of Divinity are eligible for health research project funding but only one NUHEP is eligible.[15]

Table 3 summarises eligibility for different funding programs by funding category.

14 Croucher and Waghorne, *Australian universities: a history of common cause*, p. 187.

15 The Cairnmillar Institute. NHMRC, ***NHMRC approved administering institutions*** (National Health and Medical Research Council, 2022); DHAC, ***MRFF eligible organisations*** (Department of Health and Aged Care, 2023)

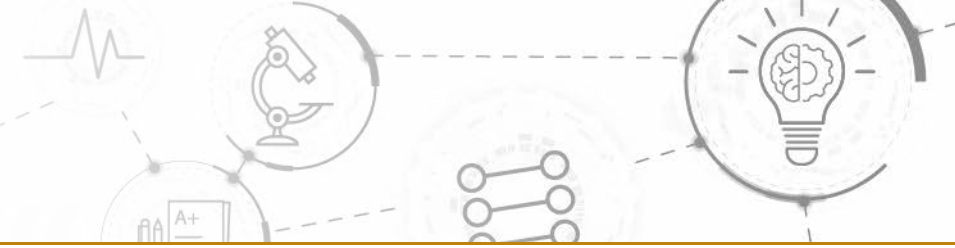


Table 3: Overview of institutional funding eligibility

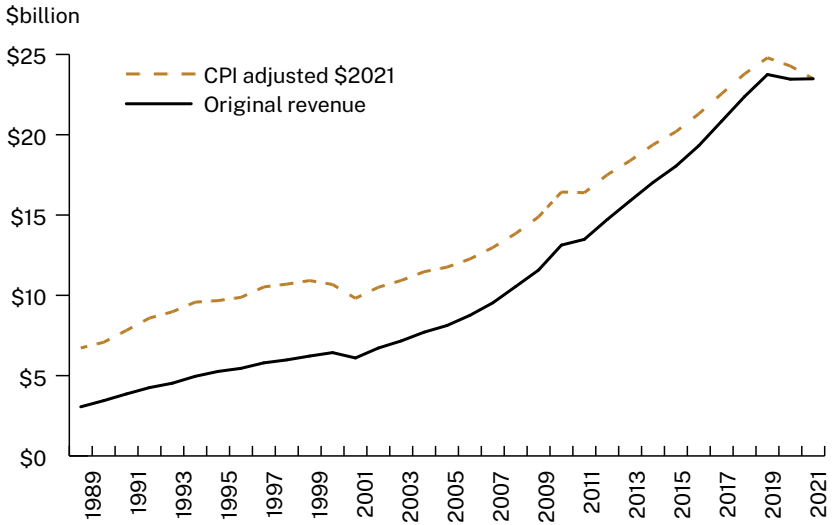
Funding Type	Table A	Table B	Table C	NUHEPs	OUA
FEE-HELP loans	✓	✓	✓	✓	✓
Commonwealth-supported places and HECS-HELP loans	✓	✓ (provided the place is in a 'national priority' category)*	✓ (provided the place is in a 'national priority' category)* [none ever allocated]	✓ (provided the place is in a 'national priority' category)*	~ Indirect via university award programs
Research Support Program	✓	✓	✗	✗	✗
Research Training Program	✓	✓	✗	✗	✗
ARC project grants	✓	✓	✗	✗	✗
NHMRC / MRFF project grants	✓	If has medical research capacity	If has medical research capacity	If has medical research capacity	✗
Student income support	✓	✓	✓	✓ If provider offers HELP	✓

*Notes: * Commonwealth-supported places when the government decides to make an allocation. The Batchelor Institute of Indigenous Education is classed as a NUHEP but is eligible for RSP and RTP grants due to its listing on Table A and is an eligible organisation for ARC grants.*

6.4 Teaching funding

Total public university revenue for teaching, including public subsidies, student loans and fees paid directly to universities was $23.5 billion in 2021. In real terms teaching revenue fell in 2020 and 2021 due to lower international student income. Despite this recent downward trend, teaching revenue has more than doubled in real terms since 2005 (Figure 29). Teaching income in 2021 was 61 per cent of all university revenue.

Figure 29: Total university teaching revenue, 1989–2021



Notes: Total teaching revenue is the university component of the teaching grants discussed in section 6.4.1, HELP lending discussed in section 6.4.2 and upfront payments by students discussed in section 6.4.3. For further notes and sources see these sections.

Sources: Department of Education, Financial reports of higher education providers.

6.4.1 Teaching grants for higher education institutions

The Commonwealth Grant Scheme (CGS) provides the main government grant for students. Public universities have the principal entitlements to CGS funding (Table 3). Total CGS funding for 2023 is $7.2 billion, of which public universities are allocated all but $29 million.[16] The CGS is the largest source of public subsidy for higher education.

Section 7.2 explains how CGS money is allocated to universities. Each institution's final payment, however, is normally related to the number of delivered student places – meaning that universities may receive less money than they were originally allocated.[17]

For funding purposes student places need to be distinguished from the student numbers discussed in chapter 2. Each student place is equivalent to the volume of study expected of a full-time student (equivalent full-time student load, or EFTSL, has the same meaning as a place). Notionally, a full-time student is expected to spend about 1,200 hours a year on learning-related activities.[18] A student place can support multiple students if they study part-time. On average in 2021, there were 1.39 enrolments per place.[19]

16 Based on funding determinations by the Department of Education: https://app.heims.education.gov.au/HeimsOnline/IPInfo/Determination

17 See the discussion on transition funding below for a partial exception. In the 2020–2023 period, a COVID-19-related payment guaranteed allocated funds, although technically this uses another funding program to compensate for lost CGS funding.

18 AQF, *Volume of learning: an explanation* (Australian Qualifications Framework, 2014).

19 Calculated from DofE, *Student load time series, PowerBI* (Department of Education, 2023), Commonwealth supported places and enrolments.

The CGS payment per place depends on its discipline. All disciplines are allocated to funding 'clusters', each with its own Commonwealth funding rate, called a Commonwealth contribution. Section 7.1 discusses these and the separate student contribution rates.

While the CGS is the major grant for teaching, other smaller programs support teaching-related activities. The largest current non-CGS program is the National Priorities and Industry Linkage Fund (NPILF), which supports engagement with industry, such as through work-integrated learning (section 3.2). NPILF allocated $242.5 million in 2023.

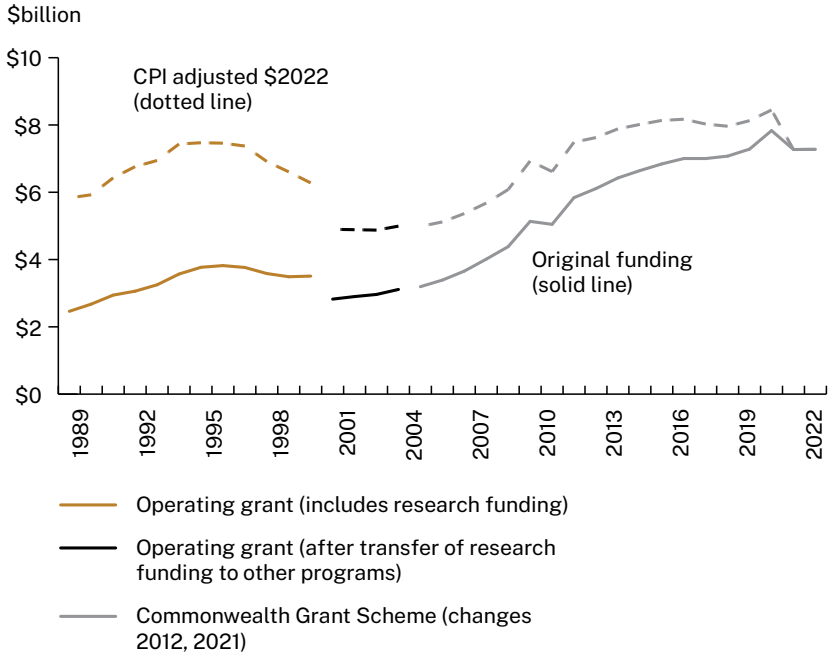
Temporary transition funding compensates universities adversely affected by changes to Commonwealth and student contributions by the Job-ready Graduates policy described in chapter 7. It paid $415.9 million in its first year (2021), and $97.9 million in 2023, its final year.

Policy changes complicate reporting long-term trends in the core teaching grant. The most significant policy shifts since 1989 are the 1997 and 2021 replacements of some public funding with student charges, and the 2001 creation of separate block grants for teaching and research, predecessors of the research programs discussed in section 6.7.1. On a smaller scale, teaching-related programs not funded from the CGS and temporary funding complicate the time series.[20]

20 For example, the Job-ready Graduates policy moved money from the CGS to other programs –including NPILF and loadings for preparatory enabling programs and regional campuses. Temporary COVID-19 funding caused a spike in 2021 and subsequent fall in 2022.

With these caveats, Figure 30 shows significant real increases in teaching grants from the late-1980s to the mid-1990s, and again from the mid-2000 to the late-2010s, mostly to finance the enrolment increases described in section 2.3.

Figure 30: Teaching grant funding, 1989–2023



Notes: Prior to 2005, universities were principally funded by an 'operating grant' for teaching and research. Much of the assumed research component was withdrawn in 2001 and paid separately under other programs. Prior to 2005 HECS was a separate cost recovery scheme. Annual HECS charges were deducted each year to identify the underlying grant amount. The figures are amounts paid, not amounts originally allocated. See section 7.2 for how these can differ. Prior to 2012, the figures are cash flows that include adjustments for previous years, which exaggerates volatility. From 2012 the payments are in respect of the year shown, not when the cash flowed. Adjusted using December quarter CPI. The practice in this report is to index to the latest year possible shown in the chart. Inflation volatility complicates the trend because CPI adjustments to grants are lagged. Funding for 2023 is current dollars.

Source: Data from the Department of Education funding determinations since 2012, data provided prior to 2012.

6.4.2 Lending to students

Since 1989, the Australian Government has lent students money to pay for their courses and, later, other associated expenses.[21] These loans are income contingent, meaning that repayments vary with the debtor's income. Students or former students who earn more than a specified amount pay a share of their income each year until their debt is fully repaid.

Within Australia, employers usually deduct repayments from the salaries of student loan debtors and send them to the Australian Taxation Office (ATO) through the PAYG system. Student loan debtors living overseas report their worldwide income to the ATO and repay using the same thresholds and rates as debtors in Australia.

21 For a history of HECS and HELP loans see T. Higgins, 'The Higher Education Contribution Scheme: Keeping tertiary education affordable and accessible', in *Successful Public Policy: Lessons from Australia and New Zealand*, ed. J. Luetjens, M. Mintrom, and P. `t Hart (ANU Press, 2019).

In 2023–24, student loan debtors begin repaying at an annual income of $51,550. Up to an income of $56,519 they repay one per cent of all their income. The share of income repaid increases with earnings, up to a maximum of 10 per cent for those earning $151,201 a year or more.[22]

6.4.2.1 Student loan schemes

Australia's original income-contingent loan scheme was known as HECS (Higher Education Contribution Scheme). It was replaced with HELP (Higher Education Loan Program) in 2005. Income-contingent loan schemes for higher education students have proliferated, with five now operating and a sixth to commence in 2024. Table 4 summarises these schemes.

The original scheme's most direct descendant, HECS-HELP, lends money to pay student contributions – the student share of the funding rate for a Commonwealth-supported place (see section 7.1). Approximately $4.9 billion is expected to be lent through HECS-HELP in 2023.[23] Ninety per cent of student contribution liabilities are deferred using HECS-HELP.[24]

The FEE-HELP scheme lends money to domestic full-fee students (see section 7.3) – mainly postgraduate coursework students in public universities and coursework students outside the public universities. FEE-HELP also supports preparatory programs called enabling courses, bridging courses for migrants seeking Australian recognition of overseas qualifications, subjects provided by OUA, and a limited list of microcredentials.[25]

All higher education providers listed in the funding legislation can offer FEE-HELP along with 103 others, making a total of 146, or just under three-quarters of all higher education providers (Appendix A). FEE-HELP lending in 2023 is estimated at $1.9 billion, with private university students borrowing 11 per cent of the total and NUHEP students 28 per cent.[26] Based on 2021 figures, over two-thirds of total FEE-HELP lending is for postgraduate study.[27]

HELP borrowing for tuition expenses is capped. For 2023, the cap is $162,336 for medicine, science, dentistry and aviation students, and $113,028 for other students.[28] HECS-HELP borrowing prior to 2020 is not counted towards the cap, but all FEE-HELP borrowing and debt accrued under tuition fee loan schemes for vocational education is included.

22 The thresholds and rates are available from the ATO: https://www.ato.gov.au/Rates/HELP,-TSL-and-SFSS-repayment-thresholds-and-rates/

23 All HELP lending estimates are based on funding determinations by the Department of Education: https://app.heims.education.gov.au/HeimsOnline/IPInfo/Determination

24 In dollar terms. In 2021, 12.6 per cent of student-contribution-liable students made an upfront payment, 3.8 per cent because they were not eligible for HECS-HELP (see section 7.1) and 8.8 per cent because they chose not to take out a loan: DofE, *Student load time series, PowerBI* (Department of Education, 2022), amounts charged and liability status (headcounts) section. In 2021 and 2022, students eligible to borrow could receive a 10 per cent discount on their student contribution amount if they paid upfront. This was abolished from 1 January 2023.

25 As of 2023, only microcredentials subsidised and price capped by the Australian Government are eligible for FEE-HELP, an exception to its normal purpose of supporting full-fee students.

26 Funding determination for 2023 dated 11 May 2023. Due to its move to Table A the University of Notre Dame is not included in this private university percentage. OUA lending is also classified to public as Table A institutions are the primary teaching institutions.

27 Calculated from DofE, *Student load time series, PowerBI*, amounts charged page.

28 As indexed to inflation. The cap includes HECS-HELP, FEE-HELP, VET FEE-HELP and VET Student Loans. It does not include loan fees, indexation, OS-HELP, SA-HELP, START-UP HELP or Student Start-up Loans.

Before 2020, the borrowing limit was for a lifetime. Since 2020, HELP debtors whose repayments bring their balance below the limit can borrow again, up to the maximum amount.

SA-HELP lends for student services and amenities fees, a separate charge on top of student contributions and tuition fees. Its maximum annual loan is $326 in 2023 (the student amenities fee price limit). An estimated $121 million will be borrowed in 2023.

OS-HELP helps finance Commonwealth-supported students studying overseas. The student borrowing limit depends on circumstances up to $9,989 for a six-month period.[29] Students can borrow twice under OS-HELP. Unlike the previously mentioned HELPs, an OS-HELP loan is not an entitlement for students meeting its criteria. The Department of Education distributes capped amounts to higher education providers, which then allocate it to students. An estimated $108 million will be lent through OS-HELP in 2023. Lending was $168 million in 2019, but only $104 million was lent in total between 2020 and 2022 as COVID-19 restrictions limited student travel.

STARTUP-HELP, to support students working on business start-up ideas, will commence in 2024. The student borrowing limit is limited to two full-time equivalent years at the student contribution rate for medicine (Table 5 in chapter 7). In 2023 this is $11,800, so a maximum of $23,600. Borrower numbers are limited to 2,000, so like OS-HELP this is not a student entitlement. The government will allocate the approximately $24 million in START-UP HELP funding to universities, which will then decide which students receive it.[30]

Each student's borrowing under the different HELP schemes is combined into a total HELP debt recorded by the ATO.

In 2016, the Australian Government converted a previous twice-yearly lump sum grant for student income support recipients into an income-contingent loan, the Student Start-up Loan. Loan eligibility is restricted to Youth Allowance, Austudy and Abstudy recipients (section 3.7.3). Eligible students can receive $1,201 twice a year. In 2021–22, they borrowed $157.9 million.[31] The Student Start-up Loan is separate from HELP but has the same repayment system. Debtors repay Student Start-up Loan debt after clearing their HELP and vocational education debt.

29 In 2023, the standard OS-HELP cap per six-month period is $7,348, or $8,817 for students going to an Asian country. An additional $1,172 is available for language study in preparation for going to an Asian country.

30 For the policy background see DofE, *Startup year consultation paper* (Department of Education, 2022).

31 Data provided by the Department of Social Services.

Table 4: Overview of higher education student loan schemes

Loan name	Loan supports	Annual borrowers	Annual lending
HECS-HELP (Starts 1989 as HECS, becomes HECS-HELP in 2005)	Student contributions (for Commonwealth supported students).	Headcount 2021 = 787,394	$4.7 billion in 2021, estimated $4.9 billion in 2023
FEE-HELP (Starts 2005 replacing OLPDS for OUA students 1994-2004; BOTPLS for bridging courses for overseas professionals 2002-2004; PELS for postgraduates 2002-2004.)	Tuition charges for full-fee domestic students, OUA fees, bridging courses for overseas-trained professionals, limited list of microcredentials.	Headcount 2021 = 155,721	$1.9 to $2 billion annually in the 2021-2023 period
OS-HELP (Starts 2005)	Overseas study expenses	Headcount pre-COVID-19 in 2019 = 16,661	$168 million in 2019, estimated $109 million in 2023
SA-HELP (Starts 2012)	Student services and amenities fees	Headcount 2021 = 522,673	Estimated $121 million in 2023
STARTUP-HELP (Legislated 2023, commences 2024)	Students working on business start-up ideas	Policy of 2,000 per year	Estimated $24 million
Student Start-up Loan (Starts 2016, similar purpose Student Financial Supplement Scheme 1998-2003, Austudy/Abstudy Supplement 1993-1997.)	Living expenses for higher education income support recipients.	Headcount 2020-21 = 91,600	$158 million in 2021-22

6.4.2.2 HELP borrowing and repayment trends

Estimated HELP lending in 2023 is $7 billion (Figure 31). Growth from the mid-2000s to the late-2010s reflected higher student contributions, new loan schemes and enrolment increases, while the slowdown in more recent years reflected soft higher education demand and transitional arrangements for Job-ready Graduates student contribution changes (student contribution rates are discussed in section 7.1).[32]

While new annual HELP lending was stable between 2019 and 2022, repayments increased significantly (Figure 31). For the 2021–22 tax year, total repayments were nearly $5.6 billion, including $780 million in voluntary repayments. Annual repayments have more than doubled since 2016-17.

Repayment increases are due to more people making repayments. This is partly an echo of enrolment increases in the 2010s (section 2.3). The number of HELP debtors grew from 1.57 million in 2010–11 to 3 million in 2021–22.[33] The first waves of additional graduates from the 2010s struggled in the labour market but employment and wages subsequently entered a catch-up phase (sections 10.1 to 10.3) that increased repayments. Compulsory repayments are likely to increase further due to the strong labour market in 2022 and 2023.

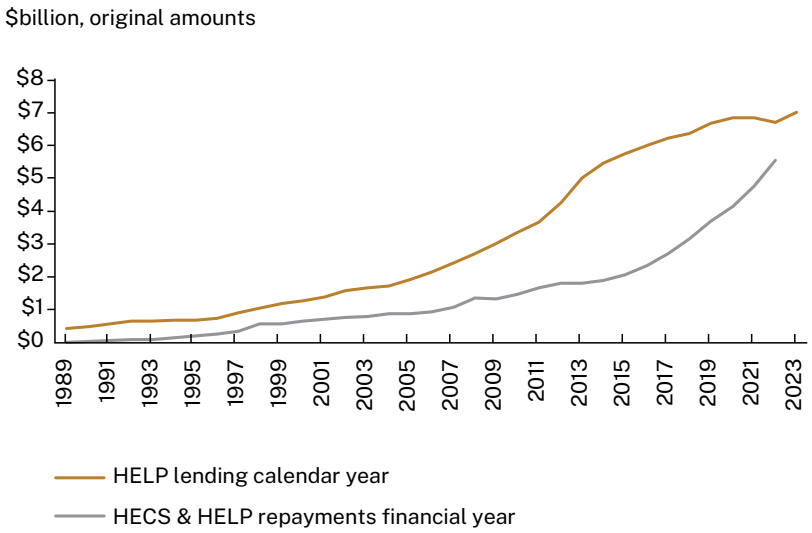
Policy changes also increased the number of repaying debtors. The first income threshold for repaying HELP debt was reduced in 2018–19 and again in 2019–20, bringing lower-income debtors into repayment. The proportion of debtors making repayments increased from 21.3 per cent in 2015–16 to 38.5 per cent in 2020–21.[34]

32 All students in courses with lower student contributions received the discounted rate from 2021, while only students commencing in 2021 or later paid the increased rate in courses with higher student contributions.

33 ATO, *Higher Education Loan Program: HELP statistics, 2005-06 to 2021-22 financial years* (Australian Taxation Office, 2022), table 8. Including people holding only VET FEE-HELP debt.

34 Calculated from ATO, *Taxation statistics 2020-21* (Australian Taxation Office, 2023), table 1A and ATO, *Higher Education Loan Program: HELP statistics, 2005-06 to 2021-22 financial years*, table 8. The effect of the 2019–20 threshold changes on total repayments is less clear, as they reduced annual repayments for many middle-income HELP debtors.

Figure 31: HELP lending and repayment, 1989–2023



Notes: Lending includes HECS-HELP, FEE-HELP, OS-HELP, SA-HELP and their predecessor schemes. Repayment figures include repayments of VET FEE-HELP debt, for vocational education, as they cannot be distinguished in the data source. Repayments include compulsory and voluntary repayments. Lending figures are for the calendar year shown, with 2023 estimated. Repayment figures are for the tax year ended 30 June of the year shown.

Sources: Department of Education funding determinations; Department of Education, Higher education report 2011–2013; ATO, Taxation Statistics 2020–21; ATO, Higher Education Loan Program: HELP Statistics 2005–06 to 2022–23 financial years.

6.4.2.3 Total HELP debt

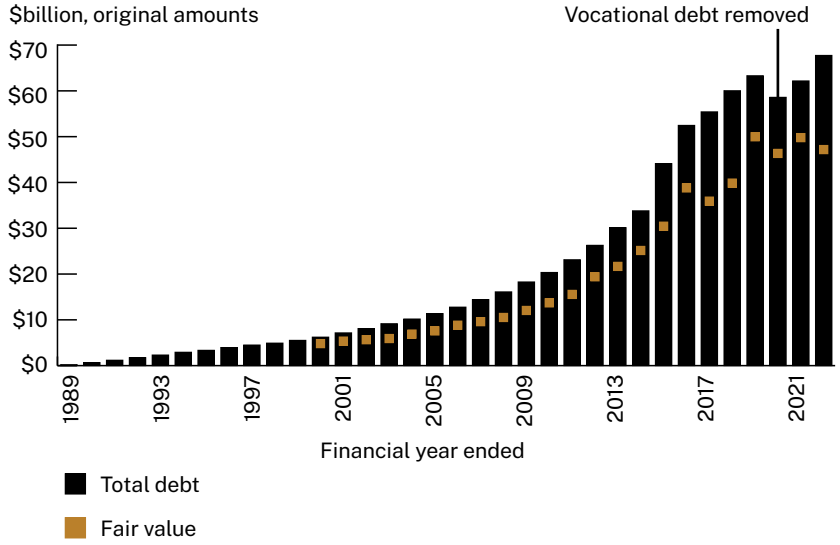
At 30 June 2022, HELP higher education debtors owed the Australian Government $67.7 billion (Figure 32).[35] Student Start-up Loan borrowers owed another $984 million.[36] Total HELP debt escalated significantly in the 2010s reflecting the enrolment boom lending and slow repayment increases discussed in the previous section. In the near-term, subdued lending and expected repayment increases will moderate debt growth. However, outstanding debt is indexed using CPI each 1 June. Recent high inflation has accelerated debt growth.

Since 2000, the government has published the HELP debt's 'fair' value (shown in Figure 32). This is the HELP debt's estimated worth to the government. At 30 June 2022, the HELP debt's 'fair value' was $47.2 billion; $20.6 billion less than its nominal value. The debt's fair value is lower than its face value due to debt not expected to be repaid (DNER), sometimes called doubtful debt, and interest subsidies on outstanding debt.

35 DESE, *2021-22 Annual report* (Department of Education, Skills and Employment, 2022), p. 152.

36 Data provided by the Department of Social Services. Another $2 billion is reportedly owed by borrowers under the predecessor student income support schemes shown in Table 4: C. Cassidy, ''It's obscene': ATO still chasing $2 billion in student debt from controversial 1990s loan scheme', *The Guardian*, 24 April 2023.

Figure 32: HELP debt, total and fair value, 1989–2022



Sources: Department of Education annual reports; Department of Education Higher education reports.

6.4.2.4 Student loan costs

Australian student loans are subsidised by the government. The main costs are DNER and, in normal years, interest subsidies.

HELP's largest cost is DNER. Higher education HELP debt is not written off until the debtor dies. With 98 per cent of HELP debt held by persons aged less than 60 years, only a small amount of HELP debt has ever been formally written off.[37]

DNER costs are therefore estimates, given what we know about HELP debtors and their patterns of repayment.[38] In 2021–22, the Australian Government Actuary estimated that 11.8 per cent of new HELP debt issued that financial year would not be repaid.[39] That would amount to approximately $800 million. In the same financial year, the DNER estimate on the stock of HELP debt was increased by $2.16 billion, reflecting lower predicted repayments from previous as well as current borrowers.[40]

The Student Start-up Loan has high DNER. The Australian Government Actuary recommended that 60 per cent of lending be classed as doubtful, equivalent to $95 million for 2021–22.[41] This is partly because it is only repaid after student debt, a delay that puts it at greater risk of non-repayment.

37 As of 2021–22, $227.5 million of HELP debt had been written off, with 19,307 HELP debtors dying before completing repayment: ATO, *Higher Education Loan Program: HELP statistics, 2005-06 to 2021-22 financial years*, tables 1 and 2. Age profile: table 8.

38 For a description of how DNER is calculated see AGA, *Reporting of the HELP receivable at 30 June 2021* (Australian Government Actuary, 2021).

39 DESE, *2021-22 Annual report*, p. 57.

40 Ibid., p. 152.

41 Information supplied by the Department of Social Services.

In normal times, HELP's other major cost is an interest subsidy. In the government's accounts this is calculated in a complex way.[42] The cost arises because the government borrows money in the bond markets, which it re-lends to students whose debts are indexed at the typically lower CPI inflation rate. In 2023, government bond rates are however below inflation.

HELP's costs are reduced by revenue from loan fees. Other than at Table B universities, full-fee undergraduates incur a 20 per cent loan fee if they take out a FEE-HELP loan. For example, if a full-fee undergraduate student borrows $10,000, this amount goes to their higher education provider, but the government records a debt of $12,000. Due to restrictions on full-fee undergraduates at public universities this policy mostly affects NUHEP students.

The Department of Education's portfolio budget statements include a summary statement of HELP costs.[43] However, this summary does not itemise costs or include all expenses associated with HELP.[44]

6.4.3 Upfront payments by students

Upfront payments by domestic students to public universities, which are mostly student contributions and postgraduate fees, have declined in real terms since their late 2000s peak (Figure 33). A greater propensity to use HELP rather than pay upfront is the main cause of this trend.

Over the three decades before COVID-19, international student revenue grew strongly in most years (Figure 33). In 2017, international student fees replaced the CGS as the single largest source of university revenue. Despite the COVID-19 downward trend in international student fees this was still the case in 2021, with $8.7 billion from international students and $7.8 billion from the CGS.[45]

42 AGA, *Reporting of the HELP receivable at 30 June 2021*.

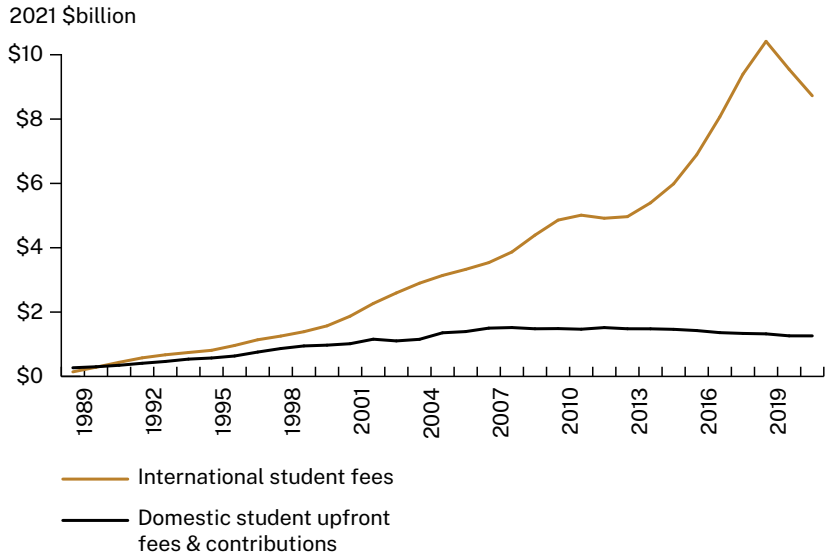
43 DofE, *Portfolio Budget Statements 2023-24* (Department of Education, 2023), p. 56.

44 PBO, *Alternative financing of government policies: understanding the fiscal costs and risks of loans, equity injections and guarantees* (Parliamentary Budget Office, Parliament of Australia, 2020), pp. 15–16.

45 The published university figures understate the economic significance of international students to them, due to both onshore and offshore revenue coming from international education but classified as royalties, dividends, and payments from third party providers (see section 1.2 on NUHEPs).

The ABS publishes estimated fees paid by higher education international students. These include fees earned by private universities and NUHEPs but exclude revenue from offshore campuses and online students, which are managed differently in ABS statistics.[46] For 2019, the ABS reported total onshore higher education fee revenue of $12.9 billion. The changed location of international students (section 2.4) caused a fall of more than 50 per cent between 2019 and 2021 to $6.1 billion, before a recovery to $8.7 billion in 2022. Revenue for 'correspondence courses', as the ABS describes what is now largely online education, increased from $9 million in 2019 to $4.9 billion in 2021, a figure that includes all levels of education, before declining to $2.8 billion in 2022 as students returned to Australia.[47]

Figure 33: Upfront payments from public university students, 1989–2021

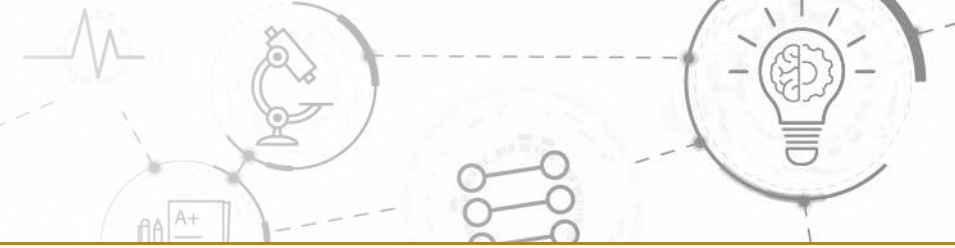


Notes: Does not include fees or charges paid by students for non-teaching services such as student amenities or accommodation. Indexed using CPI.

Source: Department of Education, Finance: Financial reports of higher education providers.

46 Deloitte Access Economics, *The value of international education to Australia* (Australian Government/Deloitte Access Economics, 2015).

47 Onshore higher education: ABS, *International trade: supplementary information, calendar year 2022* (Australian Bureau of Statistics, 2023), table 9.1. Correspondence courses: ABS, *Balance of payments and international investment position* (Australian Bureau of Statistics, 2023), table 8.



6.5 Student income support funding

Funding for the main student income support programs of Youth Allowance, Austudy and Abstudy is not capped – it is paid to all students who apply and meet its eligibility criteria (section 3.7.3 describes the criteria and reports recipient numbers).

Reported expenditure on student income support does not distinguish between higher education and other students. The estimates provided here assume payments in proportion to recipient numbers.[48] On this assumption, higher education student income support payments in 2021–22 were approximately $2.5 billion, made up of $1.74 billion for Youth Allowance, $591 million for Austudy, and $155 million for Abstudy.[49]

Applying the same formula to the Tertiary Access Payment, for regional students who relocate to study, higher education students are estimated to have received $28 million in 2022.[50]

Spending on Indigenous Commonwealth Scholarships and Research Training Program stipends (section 3.7.4) is not separately identified within their broader capped funding programs.

48 Differences between education sectors in how parent, personal and partner income tests affect payment levels would affect the accuracy of this estimate.

49 Youth Allowance figures for higher education student numbers supplied by the Department of Social Services; total numbers from DSS, *DSS Payment Demographic Data* (Department of Social Services/data.gov.au, 2022), budget numbers from DSS, *Porfolio budget statements 2022-23 (October)*, *Social services portfolio* (Department of Social Services, 2022), including main figures p. 40 and rent assistance p. 41.

50 Of the $33 million expected to be spent: DESE, *Tertiary Access Payment program guidelines 2022-2024*, p. 5.

6.6 Equity program funding

Higher education policy has six official equity groups:

- women in disciplines where they remain a minority such as engineering and IT
- non-English-speaking-background students who arrived in the past decade (with a broader definition, see section 2.3.6)
- students with disabilities
- Indigenous students (section 2.3.5)
- regional and remote students
- low socioeconomic status (SES) students (with a different definition see section 2.3.4)

In practice only the last four are the focus of equity programs.[51]

Including equity student support scholarships already described, $360 million was spent on these programs in 2021–22.[52]

51 Recently arrived non-English speaking background students are a historical equity group but these migrant groups are not under-represented at university (section 2.3.6). Separate programs aim to attract women to STEM fields.

52 Calculated from DofE, *Portfolio Budget Statements 2022-23 (October)* (Department of Education, 2022), p. 64 and Treasury, *2022-23 Budget Statement No. 4* (Treasury (Australian Government), 2022), p. 121.

The largest equity program is the Indigenous, Regional and Low SES Attainment Fund (IRLSAF), which received $250.6 million in 2021–22. It is in a transition phase as it absorbs smaller programs.[53] The funding allocated to universities is largely based on their share of low SES, Indigenous and regional students.

The government uses equity programs to steer university behaviour and assist universities with high proportions of equity students. However, equity students are primarily funded through the CGS, HELP and student income support.

6.7 Research funding

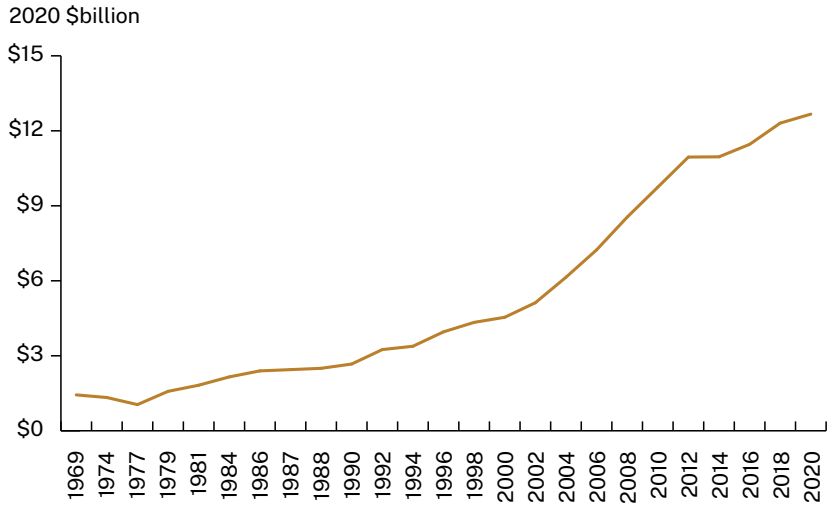
University research expenditure has expanded significantly in real terms over the last 50 years, as seen in Figure 34. It reached $12.7 billion in 2020. This figure includes assumptions about how much time teaching and research staff (section 5.1) spend on research and attributes some university overhead costs to research.

Research funding falls into three main categories:

- government grants specifically for research
- private funding specifically for research
- other university sources.

University profits on teaching, commercial income, investment earnings, and donations all provide revenue that supports research.

Figure 34: Higher education research expenditure, 1969–2020



Sources: ABS, Year Book until 1990; ABS, Research and experimental development: higher education organisations, 1992–2020.

53 These are the Higher Education Participation and Partnerships Program and loadings for regional campuses and students in enabling programs, which build their academic skills.

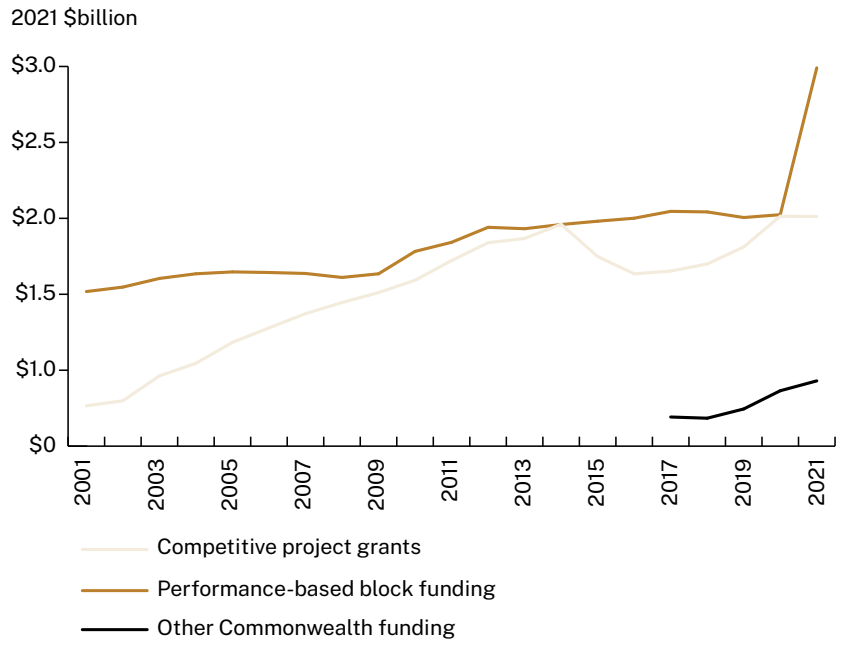
6.7.1 Public research funding programs

Table A and B institutions receive several types of Commonwealth research funding.

Competitive grants fund specific projects, centres or individuals through fellowships. Bidding institutions propose project details, and experts select successful projects. Performance-based block research grants go to universities as institutions. Each university's grant is primarily based on its relative success in attracting other funding. 'Block' funding means that universities decide its precise use, within the funding scheme's broad parameters.

As Figure 35 shows, funding for competitive research grants increased significantly in real terms until the early 2010s, when it was reduced for several years before returning to previous levels. Block funding programs increased from the late 2000s to the early 2010s. Since then, research block grants have in real terms fluctuated in a narrow range, apart from a once-off increase in 2021 described in section 6.7.1.2. Trends in other Commonwealth funding are harder to interpret. Earlier numbers are not shown due to changes in the data collected. Apart from a special Australian National University national institute grant, much of this funding is for time-limited projects.

Figure 35: Commonwealth research funding for universities, 2001–2021



Source: Department of Education, Higher education research income time series and Research block grant time series.

In addition to resources recorded in Figure 35 universities share in funding under the National Collaborative Research Infrastructure Strategy. Two research commercialisation programs, the Trailblazer Universities Program and Australia's Economic Accelerator, have funding allocated but do not yet appear in the Figure 35 time series.[54]

6.7.1.1 Competitive grants

The Australian Research Council (ARC) and the National Health and Medical Research Council (NHMRC) are the main sources of competitive grant funding. ARC grants are largely restricted to universities, but medical research institutes and hospitals share in NHMRC grants. In 2021, universities received $743 million from the ARC and $665 million from the NHMRC. Other Commonwealth competitive grant schemes totalled $604 million, with the Medical Research Future Fund the largest source.[55] The MRFF is an increasing source of funds. As of March 2023, $1.7 billion in MRFF grants to universities had been announced for projects with completion dates between 2023 and 2029.[56]

For universities, the significance of competitive grants goes beyond the money they receive. Their level of grant income contributes to their performance-based block research funding (see next section). For academics and their institutions, winning competitive grants brings prestige as well as money.

Winning an ARC grant is difficult. Projects are assessed by academic experts with only the highest quality projects supported. For Discovery Project grants, aimed at supporting excellent basic and applied research, 18.5 per cent of the 2,588 applications for funding in 2023 were approved; in recent years this rate has ranged between 18 and 23 per cent.[57] The research-intensive Group of Eight universities (section 8.3.1; Appendix A) won 63 per cent of new Discovery Projects funded in 2023. Funded projects receive between $30,000 and $500,000 a year for up to five years. Discovery grant applications must show the researchers' track records and how their proposal addresses a significant problem and fills a gap in knowledge.[58]

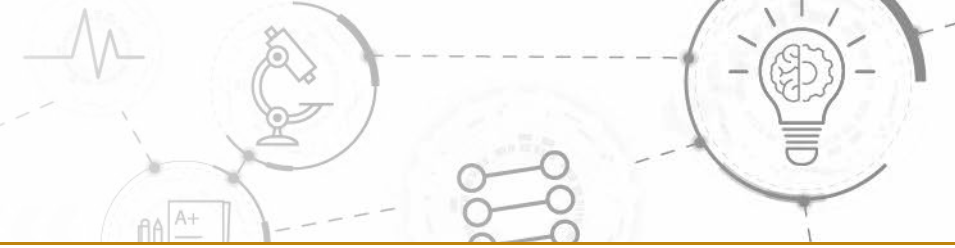
54 DofE, *Portfolio Budget Statements 2023-24*, p. 59.

55 DofE, *Higher education research data collection* (Department of Education 2022).

56 MRFF, *Medical Research Future Funding grant recipients as at March 2023* (Medical Research Future Fund, 2023).

57 ARC, *National competive grants program dataset* (Australian Research Council, 2021); ARC, *Selection report: Discovery projects 2023* (Australian Research Council, 2022).

58 ARC, *Selection report: Discovery projects 2023.*



Linkage Projects encourage collaboration between higher education providers and other organisations, including industry. Linkage grants reflect a government emphasis on useful knowledge and innovation. These grants are one reason why research activity shifted towards applied research (section 5.3). Linkage grant programs typically receive fewer applications than Discovery grants and have higher success rates – 32 per cent for the 2021 funding year. Group of Eight universities also dominate this pool, securing 58 per cent of new funding for 2021.[59]

For NHMRC project grants application success rates are also low, at only 14 per cent for universities in 2022. The criteria for assessing projects vary between NHMRC programs but scientific quality, significance and/or innovation, and the researchers' track record in research output and impact are all important. Even more so than for ARC funding, Group of Eight universities dominate. They secured 84 per cent of NHMRC project grants to universities in 2022.[60]

Project grants do not cover all direct project costs. For example, ARC Discovery Project grants do not include the salaries of their academic leaders. Of the costs that can be covered, for 2022 new grants, the ARC allocated 72.5 per cent of the requested amount.[61]

59 ARC, *Selection report: Linkage projects 2021* (Australian Research Council, 2022).

60 NHMRC, *Summary of the results of the NHMRC 2022 Grant Application Round* (National Health and Medical Research Council, 2022).

61 ARC, *Selection report: Discovery projects 2023*.

6.7.1.2 Performance-based block grants

The Research Support Program (RSP) and the Research Training Program (RTP) are both flexible block grants allocated using performance-based formulas.[62] The performance indicators vary between programs but in general have become less academic over time. Academic publication numbers ceased use in 2016. The funding formula gives more weight to income from industry and other research end-users than it did in the past.

The RSP supports the 'systemic' costs of research, including the 'indirect' costs of competitive grants.[63] For example, competitive grants do not fund general university infrastructure and overheads. The RSP is slightly weighted to industry and other engagement income (53 per cent) compared to competitive grant income (47 per cent).[64] RSP funding is $968 million for 2023, with Group of Eight universities allocated two-thirds of the total. In 2021, reflecting a one-off extra $1 billion dollars to support university research during the COVID-19 pandemic, RSP funding totalled $1.926 billion.[65]

62 Historically, several research block grant programs operated with different purposes and funding formulas, see F. Larkins, *Australian higher education research policies and performance 1987-2010* (Melbourne University Press, 2011). The current program structure has been in place since 2017.

63 The language used in the *Other Grants Guidelines (Research) 2017*.

64 DofE, *Calculating Research Support Program amounts* (Department of Education, 2021).

65 DofE, *RBG allocations time series* (Department of Education, 2022).

In normal years, the RSP is too low to cover all competitive grant indirect costs.[66] Figure 35 shows that competitive grants have increased as a share of all Commonwealth research funding since 2001, generating greater indirect costs.

RTP funding is distributed to universities according to their share of research degree completions (50 per cent weighting) and their share of competitive grants, and industry and other research income (25 per cent weighting each). High-cost fields of education and Indigenous graduates get higher weightings within the completions part of the funding formula.[67] From 2024, completions by students who completed industry internships will receive an additional weighting.[68]

The RTP provides student income support as well as offsetting other university research training costs (section 3.7.4). Its allocation is $1.11 billion for 2023, with 59 per cent going to Group of Eight universities.[69]

66 I. Watt, *Review of research policy and funding arrangements: report* (Department of Education and Training, 2015), pp. 13–14.

67 DofE, *Calculating Research Training Program amounts* (Department of Education, 2021).

68 The new weightings are set out in the *Commonwealth Scholarships Guidelines Amendment (Research) 2021.*

69 DofE, *RBG allocations time series.*

6.7.2 Other sources of research funding

Universities also draw on research funding from other governments and private sources of research funding, including industry contracts and donations. In 2021, universities received $1.7 billion in government research grants and contracts other than the major programs already discussed. This includes Commonwealth, state, local and foreign governments. Another $1.9 billion came from non-government sources.[70]

No official data source identifies how the $12.7 billion in research expenditure estimated by the ABS is funded. The ABS itself attributes 53 per cent of expenditure to 'general university sources'.[71] The block grants plus the research income reported to calculate the block grants can push unexplained expenditure down to 45 per cent of the total, or $5.7 billion.

No publicly available university financial report supports a precise calculation of where this $5.7 billion came from. Other potential sources of research funding include investment income, donations not made specifically for research, royalties, and profits from university commercial activities. However, potential research funding from these sources adds up to much less than $5.7 billion.

70 DofE, *Research income time series* (Department of Education, 2022).

71 ABS, *Research and experimental development, higher education organisations, Australia, 2020*, table 1.

Surpluses on teaching are the only possible source of the balance of research expenditure. For 2020, taking the estimate of 51 per cent of university expenditure being on 'teaching and scholarship' (section 6.1) and deducting that amount from teaching-derived revenue (section 6.4) would yield a surplus of $6.1 billion, sufficient on its own to fund the unexplained $5.7 billion of research expenditure.[72]

For 2021 and 2022, teaching profits on this scale are unlikely. Reduced domestic student funding rates discussed in section 7.1 cut surpluses on CGS-funded students. International student enrolments are in a recovery phase (section 2.4) but 2022 fee revenue is expected to be below 2020 levels.[73]

72 DofE, *Finance 2020: Financial reports of higher education providers.*

73 Based on university annual reports released by early June 2023.

HIGHER EDUCATION STUDENT FINANCE – FUNDING PER STUDENT AND INSTITUTION

7 HIGHER EDUCATION STUDENT FINANCE – FUNDING PER STUDENT AND INSTITUTION

This chapter explains student financing arrangements at the micro-level of how funding is allocated to students and universities. It distinguishes between full-fee and Commonwealth-supported students. It describes how public funding is distributed among higher education providers.

7.1 Commonwealth-supported students

'Commonwealth-supported students' are domestic students in student places eligible for Commonwealth Grant Scheme (CGS) funding (section 6.4) who are typically charged a price-capped student contribution.[1] These students are sometimes known as 'CSPs' (a reference to 'Commonwealth-supported places') or 'HECS students' (a reference to the student charges introduced in 1989). The key contrast is with full-fee students (section 7.4).

Australian citizens, permanent residents and New Zealand citizens residing in Australia are eligible domestic students for CGS funding. However, only Australian citizens, permanent humanitarian migrants, and New Zealand citizens who have lived in Australia for 10 or more years and arrived aged less than 18 years can access the HECS-HELP student loans that finance student contributions.[2]

To be eligible for a CSP, domestic students must enrol in a higher education provider with a CGS allocation (section 6.3.1) and in a course the CGS funds. These courses include all the non-research higher education courses in the Australian Qualifications Framework (AQF) (section 1.1) and preparatory enabling courses.

Except in limited circumstances, every domestic undergraduate in an institution listed in Table A of the funding legislation – primarily the public universities (section 6.3.1) – is Commonwealth-supported.[3] For domestic postgraduate coursework students, Table A institutions can offer either a Commonwealth-supported or a full-fee place (discussed in section 7.4). Other higher education providers with Commonwealth-supported places have this choice at undergraduate and postgraduate levels.

CGS payments to higher education providers for Commonwealth-supported students are based on a subsidy called a Commonwealth contribution, within total funding limits described in section 7.2. The Commonwealth contribution plus the student contribution is the overall per student funding rate received by the university.

1 Most Commonwealth-supported students are supported by the CGS and pay a student contribution. However, students in CGS-enabling places preparing them for a higher education course do not pay student contributions, higher education providers can set student contributions at $0, and higher education providers do not receive CGS payments for CSP enrolments with a value in excess of their funding agreement entitlement (section 7.2).

2 From 1 July 2023, New Zealand citizens who have been resident in Australia for four years or more are eligible for Australian citizenship.

3 For the exceptions see A. Norton, 'When can domestic undergraduates be charged full fees?', *Andrew Norton: Commentary from Carlton*, 15 October 2018.

The dollar amounts of Commonwealth and student contributions are both based on the unit of study, or subject. They are identical for undergraduates and postgraduates and for online and on-campus students but differ according to field of education.[4] There are four Commonwealth contribution amounts and four maximum student contribution amounts.[5] Universities can charge a lower or no student contribution, but this is unusual. Table 5 lists fields of education and their funding levels, expressed as the rate for a full year of study. Each of these rates is indexed annually to CPI.

Total funding rates were significantly revised in 2021 as part of the former Morrison government's Job-ready Graduates policy.[6] The new rates were based on a study of teaching and scholarship costs (see also section 7.5).[7] This costing study excluded research expenditure previously implicitly covered by student-driven funding.[8] As a result, some disciplines, including engineering and science, moved to lower total funding rates. Humanities, creative arts, business and law subjects moved to higher total funding rates.

4 For psychology and social work-related subjects, rates also vary depending on whether or not they are taught in courses qualifying the student for related professions: DofE, *2023 indexed rates* (Department of Education, 2022).

5 Disciplines with the same Commonwealth contributions are described as being in a 'funding cluster', and disciplines with the same student contributions are described as being in the same 'student contribution band'.

6 DESE, *Job-ready Graduates: Higher Education Reform Package 2020 (discussion paper)* (Department of Education, Skills and Employment, 2020).

7 Deloitte Access Economics, *Transparency in higher education expenditure: November 2019* (Deloitte Access Economics/Department of Education and Training, 2020).

8 Since 2005, the funding legislation has not specified what Commonwealth or student contribution revenue should be spent on, although a High Court case may limit use of Commonwealth contributions to student-related activities (section 8.1). However, the contributions replaced a previous grant for 'operating purposes' that was explicitly for teaching and research: *Higher Education Funding Act 1988*, sections 3 and 15. This was embedded in university practices, including the joint teaching and research academic positions described in section 5.1.

Table 5: Commonwealth and student contributions for a 2023 Commonwealth-supported place

Discipline	Commonwealth contribution ($)	Maximum student contribution ($)	Maximum total funding rate ($)
Dentistry, medicine, veterinary science	28,196	11,800	39,996
Agriculture	28,196	4,124	32,320
Engineering	16,969	8,301	25,270
Science	16,969	8,301	25,270
Computing	13,836	8,301	22,137
Visual and performing arts	13,836	8,301	22,137
Allied health	13,836	8,301	22,137
Architecture	13,836	8,301	22,137
Nursing	16,969	4,124	21,093
Languages	16,969	4,124	21,093
Mathematics, statistics	13,836	4,124	17,960
Education	13,836	4,124	17,960
Law, business, economics	1,147	15,142	16,289
Humanities except languages	1,147	15,142	16,289

Notes: The student contributions listed in the table are the maximum that universities can charge. 'Grandfathered rates' for students in some disciplines who first enrolled before 2021 are not shown here but are available at the source listed below.

Source: Department of Education, Indexed rates.

The conceptual basis for Commonwealth and student contributions changed in 2021. Previously student contributions were allocated to price levels using assumptions around relative future graduate income and course teaching costs. The Commonwealth contribution was effectively the overall funding rate minus the student contribution. Under the Job-ready Graduates policy, the government used the student funding system to promote courses it deemed national priorities. These courses received higher Commonwealth contributions and consequent lower student contributions. Courses that were not national priorities received lower Commonwealth contributions and consequent higher student contributions.[9] Before the Job-ready Graduates policy, humanities courses had the equal lowest student contribution. As Table 5 shows they now have, with business and law, the equal highest student contribution.

9 Norton, *From private to public benefit: The shifting rationales for setting student contributions.*

In 2022, a CSP 'Student Learning Entitlement' (SLE) was introduced.[10] It limits most students to an initial seven full-time-equivalent years of being a Commonwealth-supported student. Exceptions apply for long undergraduate and postgraduate courses. Another three years of 'Lifelong SLE' accrues a decade after commencement. Subjects taken prior to 2022 do not count towards the SLE total, so this policy change will not limit study for some time.

7.2 Allocating CGS funding to higher education providers

The government does not directly decide who receives a Commonwealth-supported place. Effectively, higher education providers are delegated decision makers on Commonwealth support, within the rules discussed in sections 2.1 and 7.1. The government does however decide which higher education providers can receive CGS funding (see section 6.3.1) and how much.

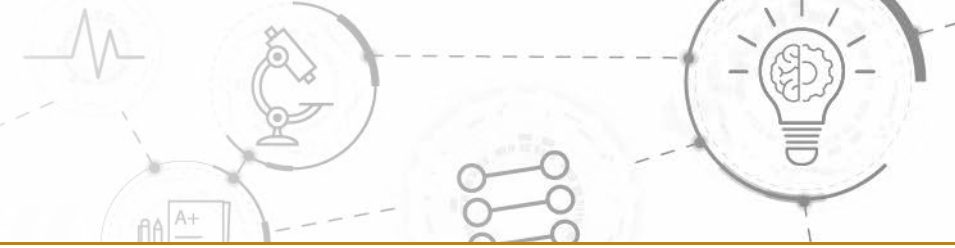
Each institution receiving CGS funding must have a funding agreement with the government. These can last up to three years, which is also their normal length. One-year agreements are sometimes used during periods of policy transition and for temporary CGS grants to higher education providers that do not normally receive them.[11]

In 2021, the Job-ready Graduates policy changed the CGS system. Commonwealth-supported places are now funded in four categories:

- higher education courses funding for Table A universities
- higher education courses funding for other institutions
- designated higher education courses funding
- demand-driven funding for regional Indigenous students.

10 A previous similar SLE was in place between 2005 and 2012.

11 Funding agreements are public documents available from the Department of Education website.



7.2.1 Higher education courses funding for Table A universities

The largest CGS funding category is for 'higher education courses' for Table A universities. It totals $6.7 billion in 2023.

Through their funding agreement, each Table A university is allocated a 'maximum basic grant amount' (MBGA) for CSPs in higher education courses. The MBGA is an annual upper limit on Commonwealth contribution payments.

Each Table A university's higher education courses MBGA is set on a largely historical basis, based on its Commonwealth-supported enrolments.[12] MBGAs include small amounts of 'growth' funding to increase capacity.[13] MBGAs in current funding agreements have annual increases based on predicted CPI rates, although this is not a legal requirement (in contrast to legislated indexation of Commonwealth and student contributions).

Within their MBGAs, universities can support AQF higher education courses, except medicine, up to masters by coursework (section 1.1). Universities can move funding between disciplines, courses (except medicine), and qualification levels, making this pool of funding a flexible block grant.[14] With Commonwealth contributions varying significantly between disciplines (Table 5) the number of student places this block grant funds could vary widely. In 2023, a million dollars from the CGS funds 872 business places but only 59 nursing places.

7.2.2 Higher education courses funding for Table B universities and NUHEPs

Higher education courses support for Table B universities and NUHEPs is allocated in student places. These places must be for 'national priority' fields, students or outcomes. The Minister for Education sets national priorities through the *Commonwealth Grant Scheme Guidelines 2020*.[15] Education and nursing courses are recurrent national priorities. Other national priorities are added on an ad hoc basis. Currently they include additional disciplines and increasing enrolments from 'persons from under-represented backgrounds'.

12 Changed Commonwealth contributions under the Job-ready Graduates policy caused significant changes in dollar amounts allocated. Students enrolled before 2021 in courses with higher student contributions under the Job-ready Graduates policy are 'grandfathered' at the old rates. Formula-driven assumptions about their transition out of the system reduce the underlying MBGA, as they are replaced with new students on lower rates. However, the assumed number of Commonwealth-supported places and their distribution between disciplines was based on historical enrolments.

13 3.5 per cent annual growth for regional campuses, 2.5 per cent for metropolitan campuses in high growth areas, and 1 per cent for metropolitan campuses in low growth areas: DESE, *Job-ready Graduates: Higher Education Reform Package 2020 (discussion paper)*, p. 15.

14 However, under the funding agreements all providers receiving CGS funds need to consult with the government before closing courses leading to occupations in skills shortage areas or which are priority areas under the Job-ready Graduates policy. The Albanese government allocated temporary MBGA increases for equity students in specified courses, worth $100.1 million for Table A universities in 2023, creating an exception to the intended flexibility of higher education courses funding.

15 Either house of parliament can disallow these guidelines but cannot propose national priorities. The term 'national priorities' is used in different ways in higher education policy. Here it has a precise legal meaning.

Within the 'national priority' areas, student places are allocated to higher education providers through funding agreements. The MBGA must be at least the allocated number of student places multiplied by the relevant Commonwealth contribution. Because this CGS allocation is in student places rather than an overall dollar amount, as it is for Table A institutions, it benefits from Commonwealth contribution indexation (section 7.1). In 2023, five NUHEPs and one private university were allocated $25.5 million for their recurrent programs. Three private universities and four NUHEPs were allocated $3.8 million for other courses and students.

Non-Table A institutions can only enrol Commonwealth-supported students in the disciplines and courses described in their funding agreements. However, they can mix CSP and full-fee students, with no restrictions on numbers, fee revenue or loan income for full-fee students.[16] This is flexibility Table A universities do not have for undergraduate courses.

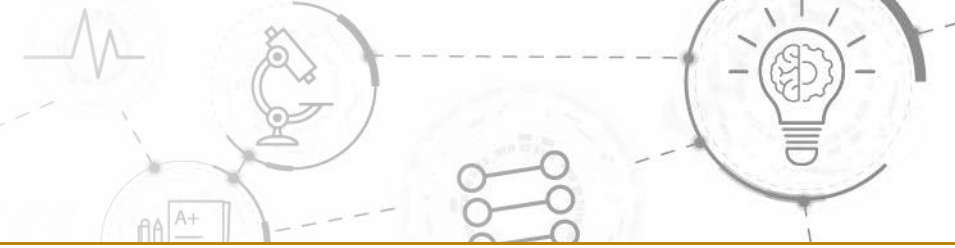
7.2.3 Designated higher education courses

Designated higher education courses are used when the government wants to cap student places in Table A universities. Courses in medicine are designated under the funding legislation. The Minister for Education can designate other courses but as of June 2023 had not done so.[17] It is expected that $383 million will be paid for designated medical places in 2023. A medical student loading intended to support clinical training is also paid, worth $20.1 million in 2023.

Funding for a 'designated higher education course' is allocated in student places. As for places allocated to non-Table A institutions, the MBGA must be at least the allocated number of student places multiplied by the relevant indexed Commonwealth contribution rate.

16 FEE-HELP lending by higher education providers that are not on Table A or Table B can be limited. However, no limits applied as of June 2023.

17 Either house of parliament can disallow a ministerial designation. Before 2021, sub-bachelor and postgraduate CSPs were designated and allocated according to the then funding clusters.



7.2.4 MBGAs and amounts paid

For higher education courses and designated courses, the amount of CGS funding a provider receives is reduced if they 'under-enrol'. This means that the student places delivered are valued at less than the MBGA (based on student places multiplied by the relevant Commonwealth contributions). The amount paid is the lesser of the MBGA or the value of student places delivered. However, until 2023, a Higher Education Continuity Guarantee means that the CGS under-enrolment penalty does not apply. This was introduced to support financial stability as COVID-19 affected university revenues. In July 2023 the government announced a new guarantee for 2024 and 2025, but with conditions on how the money can be spent.[18]

If universities 'over-enrol' in these course categories – deliver CSP student places valued at more than their funding agreement allocation – they receive no additional CGS funding but still receive student contributions (section 7.3). For medical courses, however, universities can be penalised for taking more students than specified by their funding agreement.

7.2.5 Demand-driven funding

The smallest CGS funding category is 'demand-driven' funding for Indigenous students from regional and remote areas attending Table A institutions. Universities are paid the relevant Commonwealth contributions for all students meeting these criteria enrolled in bachelor degrees other than medicine. There is no maximum funding amount under this program. It is expected that $46.8 million will be paid in 2023. The government has announced plans to extend demand driven funding to all Indigenous students.[19] Between 2012 and 2017, demand-driven funding applied to all bachelor-degree students at Table A institutions.[20]

7.3 Allocating student contribution funding to universities

While Commonwealth contributions are capped (except for regional Indigenous students), total student contribution payments to universities have no maximum amount. They are paid according to the number of student places multiplied by the relevant student contribution amount. The money comes from upfront student payments (section 6.4.3) or HECS-HELP (section 6.4.2).

18 Clare, 'Australian Universities Accord Interim Report and immediate actions'.

19 Ibid.

20 A. Norton, *After demand driven funding in Australia: Competing models for distributing student places to universities, courses and students* (Higher Education Policy Institute, 2020).

Although no legal limit restricts student contribution revenue, in practice allocated CGS funding acts as a soft cap. In most courses the student contribution is less than half of total revenue per student (Table 5), making over-enrolments potentially loss making.

7.4 Full-fee-paying students

Full-fee-paying students do not receive CGS funding. The fees they pay are lightly regulated. There is a floor price for onshore international students, but no legal ceiling on what universities can charge international students or domestic students in full-fee markets.[21] Only market forces regulate maximum fees.

Except for medical students, the number of full-fee students is unregulated.[22] There is no limit on total upfront fees or FEE-HELP revenue. Full-fee students therefore provide greater revenue growth opportunities than CSP students.

Figure 36 shows median fees charged to international students taking select bachelor degrees in 2022, along with the maximum and minimum fee charged. The median fee ranges from $30,500 to $36,400 a year, depending on discipline. Fees vary widely around these mid-points. The most expensive university can charge twice as much as the cheapest university offering a similar course. International students often choose high-fee over low-fee universities.[23]

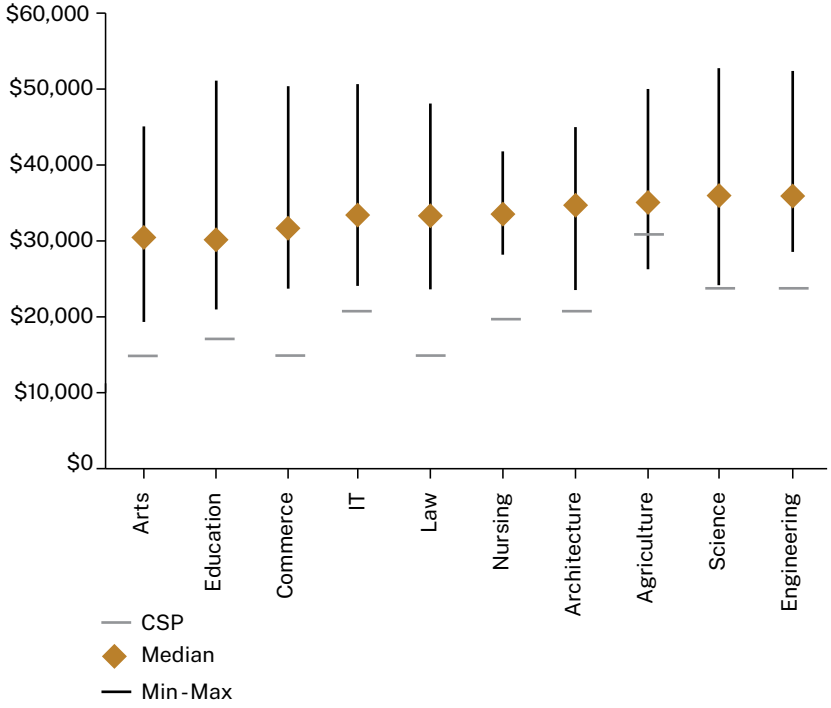
Generally, universities earn more from an international than a domestic undergraduate student, shown by the CSP marker in Figure 36. However, in science and agriculture the minimum reported international student fee is similar to or below the combined Commonwealth and student contributions for 2022 (those reported in Table 5 less indexation for 2023).

21 The floor prices are available in DofE, *2023 indexed rates*. Their purpose is to prevent universities spending public money on international students.

22 In Table A institutions domestic full-fee undergraduates can only be enrolled in limited circumstances, but there are no caps on numbers.

23 A. Norton and I. Cherastidtham, *University fees: what students pay in deregulated markets* (Grattan Institute, 2015), chapter 2.

Figure 36: Annual international student bachelor-degree fees, 2022



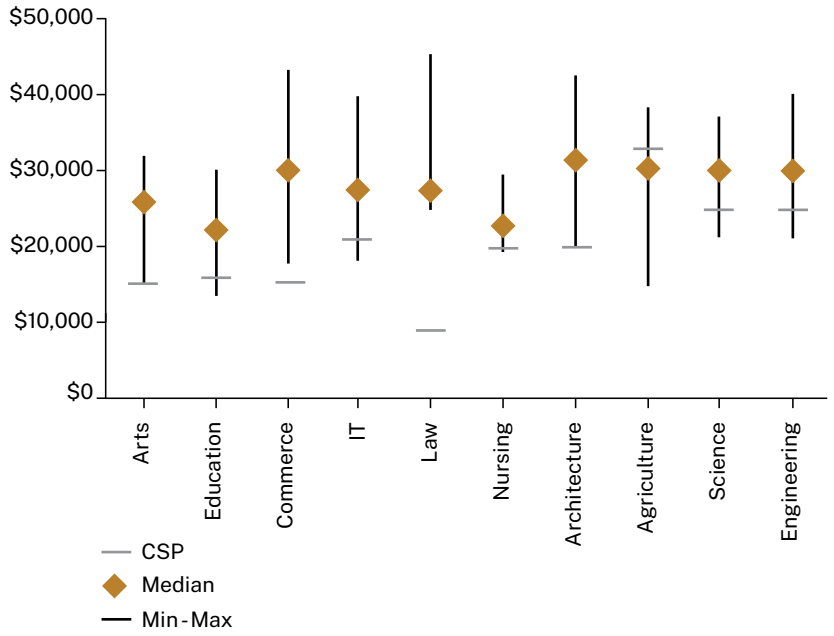
Notes: Fees are indicative as students are charged by the subject.
CSP = Commonwealth-supported place. Data from 40 universities.

Source: StudyMove.

Although full-fee domestic postgraduates are sometimes charged high fees, they pay significantly less than bachelor-degree international students in the same field (Figure 37). In several courses the cheapest domestic full-fee university charges less than the CSP funding rate. In education, nursing and agriculture the median fee is also close to the CSP rate.

Generally, less prestigious universities set lower fees. Mission as well as market factors influence the fees charged. Universities use domestic full-fee postgraduate places to expand their capacity beyond the limits imposed by CSP funding policy (section 7.2). Lower fees may also attract price-sensitive students.

Figure 37: Annual domestic postgraduate student coursework fees, 2022



Notes: Fees are indicative as students are charged by the subject. CSP = Commonwealth-supported place. Data from 35 universities.

Source: StudyMove.

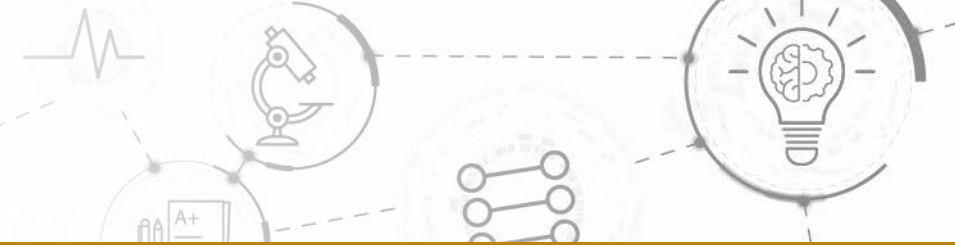
7.5 Teaching spending per student

While income from teaching has long been reported (section 6.4), regular teaching expenditure data is recent. It needs caveats due to inherent calculation difficulties. The same staff and facilities produce teaching, research and community engagement. Assumptions made in dividing joint costs between activities may inflate or deflate teaching costs. Universities use different cost methodologies, which can affect teaching cost estimates.

Using 2020 cost data, a 37-university study found that on average a full-time-equivalent student cost $18,800 a year to teach. Average costs were lower for bachelor-degree ($17,900) than postgraduate coursework students ($21,700).[24] By field of education, bachelor teaching costs varied from around $15,000 for business, education and most arts fields to more than $46,000 for veterinary science.[25]

24 Deloitte Access Economics, *Transparency in higher education expenditure: 2022*, p. xvii.

25 Deloitte Access Economics, *Transparency in higher education expenditure: 2020 spreadsheets (QILT website)* (Deloitte Access Economics/Department of Education, 2022).



Another cost study using 2019 data was smaller, involving 11 universities, but all used the same subject-level costing methodology.[26] The number of students enrolled in the subject was the most significant factor explaining different cost levels. Other important factors were mode of delivery, with online being cheaper, and campus location, with regional campuses having higher costs. As with the other study, postgraduate subjects cost more to teach.[27]

7.6 Internal allocation of teaching revenue

How universities spend teaching revenue is not well researched. The funding legislation does not specify how either Commonwealth or student contributions are to be spent.

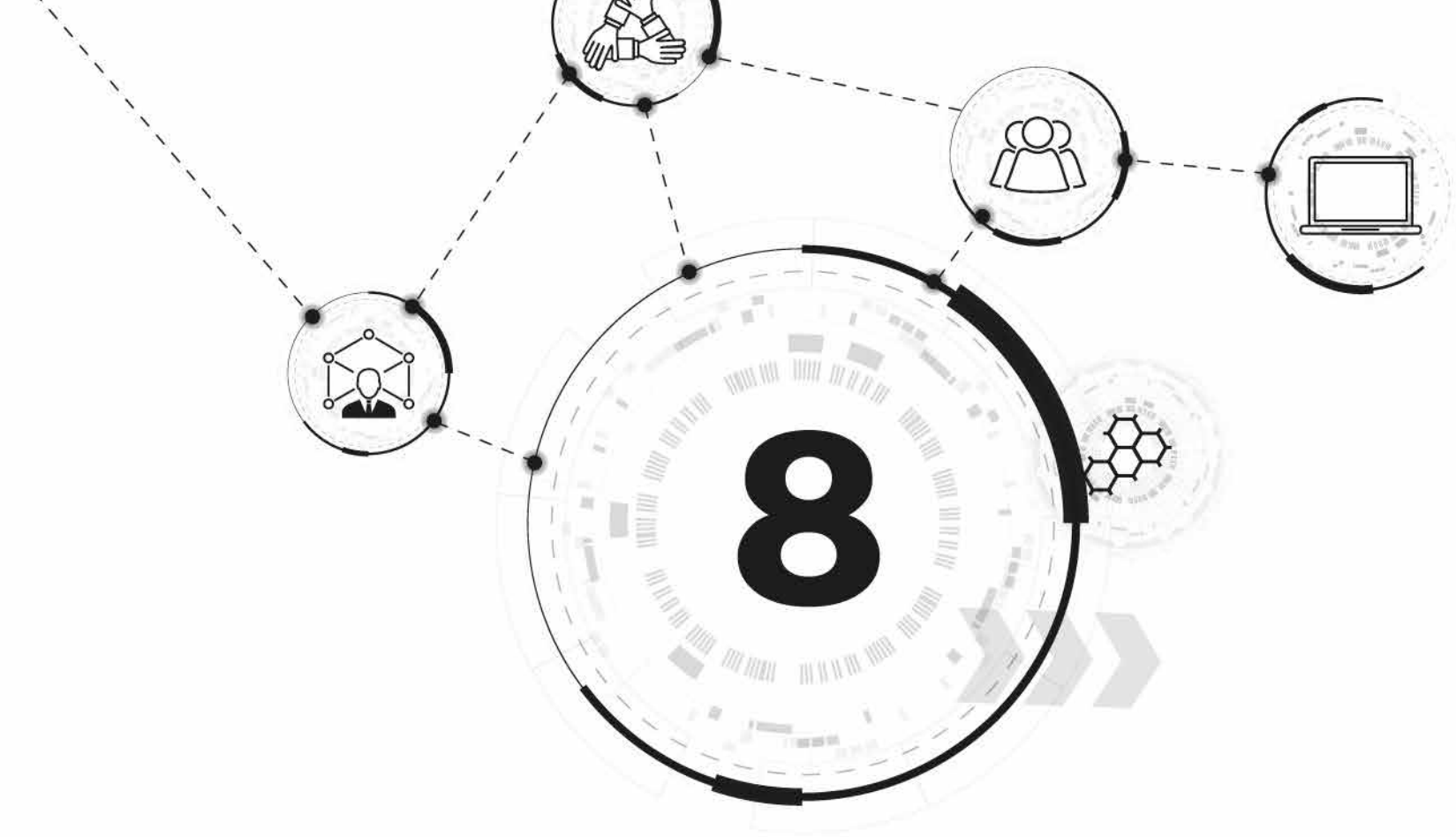
Within their overall funding allocation universities can, with a few exceptions specifying in detail the student places to be delivered, distribute CSP funding internally according to their own costs and priorities. The funding system does not adjust per-student rates to institutional differences, but it does permit universities to adjust their own spending.

In practice, however, revenue from Commonwealth-supported students tends to be allocated to the faculties or departments where the students are enrolled. If spending on these students exceeds revenues, the faculties or departments are typically described as losing money or receiving cross-subsidies from profitable parts of the university. In practice, Commonwealth funding rates shape university behaviour more than is required by the funding legislation.

Full-fee students can generate significant surpluses above teaching costs, with no rules on how to use the money. These features make full-fee students attractive. A significant amount of profit on full-fee students is spent on research (section 6.7.2).

26 G. Croucher et al., *What does it cost to educate a university student in Australia?* (Melbourne Centre for the Study of Higher Education /Pilbara Group, 2021).

27 Regression analysis of cost drivers in earlier Deloitte Access Economics teaching expenditure work had parallel findings, with student to staff ratios the largest determinant of costs. Students with regional backgrounds were associated with higher costs: Deloitte Access Economics, *Transparency in higher education expenditure: 2022*, pp. 73–74.



HIGHER EDUCATION POLICYMAKING

8 HIGHER EDUCATION POLICYMAKING

Higher education policymaking is centralised in Canberra. This chapter explains how the Australian Government became dominant, summarises the key government ministries and agencies, and outlines the sector's interest groups.

8.1 The rise of Commonwealth authority

Australian higher education began as a state responsibility. Except in its territories, the Australian Government lacked clear constitutional power to establish, regulate or fund a higher education institution. The Canberra-based Australian National University, legislated in 1946, is the only Australian Government university.[1]

While the states had full responsibility for education in Australia's early decades, during and after World War II, the Commonwealth slowly increased its policy involvement in higher education.[2] A Universities Commission was established in 1943 for war-related skills planning, with various similarly named successor bodies, but there was no Australian Government department or minister for education until 1966.[3] A 1946 amendment to the Australian Constitution authorised laws with respect to 'benefits to students'. This remains the only reference in the Australian Constitution to education, albeit an indirect one.

1 Other universities are based on state or territory legislation or company law.

2 See H. Tracey, *Education for all Australians: a history of the Commonwealth education agency 1945-2001* (Department of Education, Training and Youth Affairs, 2001); Forsyth, *A history of the modern Australian university*, especially chapter 3; Department of Prime Minister and Cabinet, *Reform of the federation white paper: roles and responsibilities in education, part B vocational education and training and higher education* (Australian Government, 2014), chapter 4; Croucher and Waghorne, *Australian universities: a history of common cause*.

3 Previously education was managed by the Department of Prime Minister and Cabinet. There was a minister assisting the prime minister on education and research from 1963: See Tracey, *Education for all Australians: a history of the Commonwealth education agency 1945-2001*; Parliamentary Library, *Parliamentary Handbook (online version)* (Parliamentary Library, Parliament of Australia, 2023).

The ‘benefits to students’ power supported merit-based Commonwealth scholarships from 1951, and from 1974 the means-tested student income support payment TEAS (Tertiary Education Assistance Scheme), the predecessor of current income support programs (section 3.7.3).[4]

In 1988, the ‘benefits to students’ power was used to legislate the loan component of HECS, the first time the Constitution’s words appeared in higher education funding legislation. The ‘benefits to students’ power was not, however, explicitly used to support Commonwealth teaching grants to universities until 2005.

For decades the main constitutional vehicle for funding higher education institutions was conditional grants to the states under section 96 of the Constitution. This bypassed the lack of clear legal authority to make direct teaching grants to higher education institutions in the states. In 1993, however, the Commonwealth started making direct grants.[5]

The Commonwealth’s funding gave it significant but incomplete power over higher education for domestic students. The rules it imposed were conditions of grants, not laws applying to all higher education institutions. The funded institutions could, in theory, have declined a Commonwealth grant and its associated conditions. In practice, they generally accepted whatever funding conditions were set. This let the Commonwealth leverage its limited legal position into extensive control.

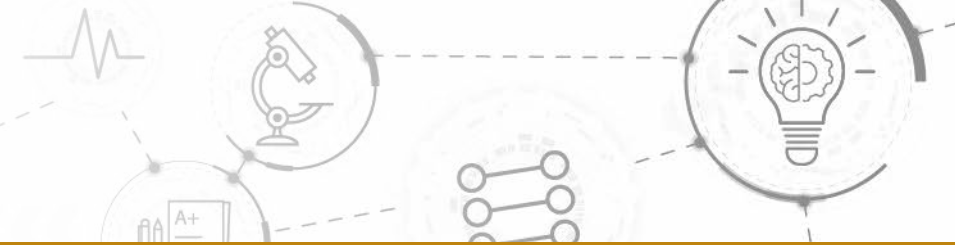
Commonwealth funding power over public universities and higher education providers reached its peak in the decade after 1974. State governments stopped funding teaching and research on a regular basis, and Commonwealth-supported providers were not allowed to charge tuition fees until these were reintroduced from the mid-1980s. Although governments of this time respected university academic autonomy, the universities had limited non-Commonwealth income to fund their own priorities (Figure 28).

International education, by contrast, could be directly regulated through constitutional powers over immigration, ‘external affairs’ and ‘trade and commerce with other countries’. In the 1990s, the Commonwealth increased controls on higher education providers offering courses to international students.[6]

4 Daniels, *Student income support: a chronology.*

5 The Constitutional issues are not mentioned in the legislation’s explanatory memorandum or the minister’s second reading speech. Possibly they thought it was section 81 of the Constitution, which provides legal authority to appropriate money ‘for the purposes of the Commonwealth’: G. Craven, ‘Commonwealth power over higher education: implications and realities,’ *Public Policy* 1, no. 1 (2006), p. 7. The High Court’s interpretation of this wording was narrowed in the 2009 *Pape* case.

6 Megarrity, ‘A highly regulated ‘free market’: Commonwealth policies on private overseas students from 1974 to 2005’, pp. 48–49.



Unless offering courses to international students, in the 20th century the private higher education sector was largely outside the Commonwealth's power. Private higher education institutions were regulated by state government accreditation agencies, although with national coordination of rules from 2000.[7] Until FEE-HELP began in 2005, most private higher education institutions received no Commonwealth money to which funding conditions could be attached.

The 2006 High Court *WorkChoices* was a legal turning point. The court took an expansive view of the Australian Constitution's power to make laws concerning corporations. Since higher education is largely delivered by organisations, including universities, that are legally corporations (as opposed to partnerships or state government departments), the Commonwealth now uses the corporations power to regulate higher education accreditation and quality control. The Tertiary Education Quality and Standards Agency (TEQSA) replaced state higher education accreditation bodies in 2012.[8] Although a satisfactory constitutional basis for most of TEQSA's duties, the corporations power has limits. In 2019, the Commonwealth acknowledged that it lacked full constitutional power to regulate cheating by domestic students.[9]

In most situations the corporations power lets the Commonwealth mandate rather than buy compliance with its higher education policies. The corporations power brings all higher education institutions, not just those receiving public funds, under national government control.

While the *WorkChoices* case increased Commonwealth power, other High Court cases have complicated it. In a 2014 case on Commonwealth funding of school chaplains, the High Court took a narrow view of the 'benefits to students' power. The benefit needs to be closely related to being a student and for specific students.[10]

The Commonwealth Grant Scheme (CGS), which funds student places filled by specific students (sections 7.1 and 7.2), would be constitutionally valid. HELP allows specific students to defer their tuition costs. The Research Training Program (RTP) similarly has close links to students. However, the 'benefits to students' power does not support general research funding.

7 MCEETYA, *National protocols for higher education approval processes* (Ministerial Council on Education, Employment and Youth Affairs, 2000).

8 For more detail on the legal issues, see G. Williams and S. Pillai, 'Commonwealth power over higher education,' *University of Queensland Law Journal* 30, no. 2 (2011).

9 Australian Government, *More support for academic integrity in higher education* (Department of Education, 2019).

10 S. Chordia, A. Lynch and G. Williams, 'Williams v Commonwealth [No. 2]: Commonwealth executive power and spending after Williams [No. 2],' *Melbourne University Law Review* 39 (2015).

Direct Commonwealth research funding lacks an explicit constitutional basis. Some High Court authority exists for using an implied 'nationhood' power to support research spending.[11] In 2015, the government strengthened the legal basis of research block grants and some other university programs. It listed in the funding legislation areas of Commonwealth legislative power that could also be the subject of research or other higher education grants.[12] If direct Commonwealth research funding was successfully challenged in the High Court it could be restored through conditional grants to the states.

The more likely outcome is that the states will continue with their current limited role in higher education policy.[13] They still have university acts on their statute books and impose reporting and accountability requirements on universities. Changes to the AQF (section 1.1) require state government approval. States must be consulted about some TEQSA-related matters, including new universities in their jurisdictions. State and federal education ministers meet about four times a year through the Education Ministers Meeting, which can affect higher education policy, such as their agreement on schoolteacher workforce policies.[14] State governments help market their universities to international students and sometimes fund special projects at universities within their borders. Yet on key higher education regulatory and funding matters the states have little influence.

11 See A. Twomey, 'Pushing the boundaries of executive power - Pape, the prerogative and nationhood powers,' *Melbourne University Law Review* 34 (2010) for an analysis and critique.

12 Now section 41-95 of the *Higher Education Support Act 2003.*

13 Charles Darwin University and the University of Canberra have legislation from their respective territories. Although territories and states have different constitutional positions, the paragraph applies to them both.

14 EMM, *The National Teacher Workforce Action Plan December 2022* (Education Ministers Meeting, 2022).

8.2 Commonwealth departments and agencies

8.2.1 The Department of Education

Higher education is primarily the responsibility of the Department of Education. It manages the major teaching, equity and research block grant funding schemes described in chapters 6 and 7. It also runs the HELP loan scheme in collaboration with the Australian Taxation Office (ATO). These policies are authorised by the *Higher Education Support Act 2003.* The department has overarching policy responsibility for higher education standards (discussed below). These are authorised by the *Tertiary Education Quality and Standards Agency Act 2011.* The *Education Services for Overseas Students Act 2000* and the *Australian Research Council Act 2001* are also administered by the Department of Education.

8.2.2 Tertiary Education Quality and Standards Agency

TEQSA began operations in early 2012. Its main task is to apply and enforce the TEQSA legislation. The *Higher Education Standards Framework (Threshold Standards) 2021*, made by the Minister for Education under the authority of the TEQSA legislation on the advice of the Higher Education Standards Panel (section 8.2.3), cover higher education provider registration and course accreditation.

TEQSA registers higher education providers and approves courses offered by non-self-accrediting institutions (chapter 1). It carries out these tasks independently of the minister, who can only give TEQSA directions of a general nature (not about a specific provider). These directions can be disallowed by a majority vote of the House of Representatives or the Senate.

TEQSA is also responsible for several regulatory functions under the *Education Services for Overseas Students Act 2000*.

The legislation establishing TEQSA sought to minimise its bureaucratic burden on higher education providers. Instead of detailed auditing, TEQSA uses risk indicators to monitor higher education providers, concentrating its attention on the institutions with warning signs of non-compliance with the standards.[15]

8.2.3 Higher Education Standards Panel

The Minister for Education appoints a Higher Education Standards Panel to develop and advise on the standards framework. Before making a standard, the minister consults state education ministers and TEQSA. In practice, ministers use the panel to investigate and report on matters broadly related to the standards, such as how admissions requirements are publicised, students not completing their courses, and the quality of online higher education.

15 TEQSA, *TEQSA's risk assessment framework: version 2.3* (Tertiary Education Quality and Standards Agency, 2019).

8.2.4 The research project grant agencies

The two main competitive grant research agencies are the Australian Research Council (ARC) and the National Health and Medical Research Council (NHMRC) (section 6.7.1). They each have their own statutes. They report respectively to the education minister and the health minister.

The ARC and NHMRC work within broad policy frameworks established by the government, with priorities set by the relevant ministers. Both organisations use systems of peer review – assessment by experts, usually academics – to determine which applications are successful. This approach respects the culture of universities (section 1.3). Each organisation's legislation prevents its minister directly interfering in favour of a project. The ministers can only approve or not approve funding recommendations made by the agencies. Approval is usually a formality, but recent Liberal ministers vetoed small numbers of ARC grants.[16] These vetoes are always controversial. In recent years, other aspects of ARC operations have also attracted criticism, leading to a government-appointed review that reported in April 2023.[17]

The Medical Research Future Fund (MRFF) is an increasing source of research revenue. It is financed by earnings from a government investment fund established in 2015. The NHMRC administers some MRFF grants.

16 Brennan and Ferguson, *Independence of the Australian Research Council.*

17 M. Sheil, S. Dodds and M. Hutchinson, *Trusting Australia's ability: review of the Australian Research Council Act 2001 final report* (Australian Government, 2023).

8.2.5 The Chief Scientist

Australia's Chief Scientist advises the Prime Minister and other ministers on science, technology and innovation. This occurs formally through the National Science and Technology Council, of which the Chief Scientist is executive officer.

8.2.6 Department of Home Affairs

The Department of Home Affairs, which includes the former Department of Immigration, has a major influence on Australian higher education. It controls eligibility for student visas (section 2.4.1), and the post-study temporary and permanent migration programs that attract international students to Australia (section 10.4).

8.2.7 Department of Foreign Affairs and Trade

In 2020, the Minister for Foreign Affairs acquired a significant power, under new 'foreign arrangements' legislation, to veto certain university international collaborative and other agreements.[18]

A statutory agency in the Foreign Affairs and Trade portfolio, the Australian Trade and Investment Commission, known as Austrade, promotes Australian education to international students.

18 DFAT, *Foreign arrangments scheme.*

8.2.8 ASIO and other security agencies

The foreign minister's powers over 'foreign arrangements' were part of a range of policies reflecting concerns of the Australian Security Intelligence Organisation (ASIO) and other security agencies about 'foreign interference' in Australian universities.[19] These concerns also led to immigration review of research student thesis topics, and new restrictions on the political activities of temporary migrants, including international students.[20]

8.2.9 Department of Social Services

The Department of Social Services is responsible for student income support policy. Through Centrelink, Services Australia administers payment of student income support, including the Start-up Loan (section 3.7.3).

8.2.10 Minister for Indigenous Australians / Department of Prime Minister and Cabinet

The Minister for Indigenous Australians has policy responsibility for Indigenous student assistance grants funded under the *Higher Education Support Act 2003.* The Department of the Prime Minister and Cabinet administers these grants.

19 For a discussion of the issues see PJCIS, *Inquiry into national security risks affecting the Australian higher education and research sector* (Parliamentary Joint Committee on Intelligence and Security, Parliament of Australia, 2022).

20 A. Norton, 'Further restrictions on the political freedoms of international students and other temporary migrants', *Andrew Norton: Higher education commentary from Carlton (blog)*, 20 February 2022. UFITSG, *Guidelines to counter foreign interference in the Australian university sector.*

8.3 Higher education interest groups

Higher education interest groups represent universities, non-university higher education providers, higher education staff, and students.

8.3.1 University interest groups

The oldest university interest group is Universities Australia, known until 2007 as the Australian Vice-Chancellors' Committee (AVCC).[21] All 38 public universities and Bond University are Universities Australia members.

In the 1990s, the AVCC struggled to represent the diverging views of its members, especially on research policy and fees for domestic students. Several new university organisations formed since 1999 give voice to these different perspectives.[22] These include the Australian Technology Network (ATN), which represents several technology universities and two other institutions; the Group of Eight, which represents the eight most research-intensive universities; Innovative Research Universities (IRU), which represents five suburban research-intensive universities founded in the 1960s and 1970s and two newer institutions; and the Regional Universities Network (RUN), which represents seven regional universities. About 70 per cent of universities are members of one of these groups. University interest groups membership lists are in Appendix A.

The Australian Higher Education Industrial Association has 32 university members. It primarily assists members with workplace relations matters, but also engages with related public policy issues.

8.3.2 Non-university higher education provider interest groups

Two interest groups represent private higher education providers. The Independent Tertiary Education Council Australia (ITECA) represents both higher education and vocational education providers. Until 2019 it called itself the Australian Council for Private Education and Training (ACPET). Independent Higher Education Australia (IHEA), until 2019 the Council of Private Higher Education (CoPHE), represents only higher education providers. Both organisations lobby for more equal treatment of students and higher education providers across the public and private higher education sectors.

TAFE Directors Australia (TDA), although primarily concerned with vocational education, represents TAFEs offering higher education courses. Dual sector universities (footnote 7) are also TDA members.

21 For the history of these organisations see Croucher and Waghorne, *Australian universities: a history of common cause.*

22 Ibid., pp. 191–194.

8.3.3 Staff and student interest groups

The major union representing university staff, the National Tertiary Education Union (NTEU), had 26,313 members as of September 2022, just under a quarter of university staff.[23] The Community and Public Sector Union (CPSU) also represents some non-academic staff.

The National Union of Students (NUS) is a peak body for university student organisations. It lists 19 member organisations on its website.[24] The Council of Australian Postgraduate Associations (CAPA) represents campus-based postgraduate organisations.[25] Its website lists 28 affiliates.

The Council of International Students Australia (CISA) represents tertiary rather than just higher education students, although all but one of its 18 listed member organisations, including NUS and CAPA, are from the higher education sector.

8.4 An Australian Universities Accord?

At the time of writing, a higher education policy review is underway under the title of 'Australian Universities Accord'. It has broad terms of reference and with wide consultation hopes to reach a new policy consensus.[26] An interim report was released in July 2023 with a final report due by December 2023.[27]

23 NTEU, *NTEU Annual report 2021-22* (National Tertiary Education Union, 2022), p. 25. For its history see J. O'Brien, *National Tertiary Education Union: A most unlikely union* (UNSW Press, 2015).

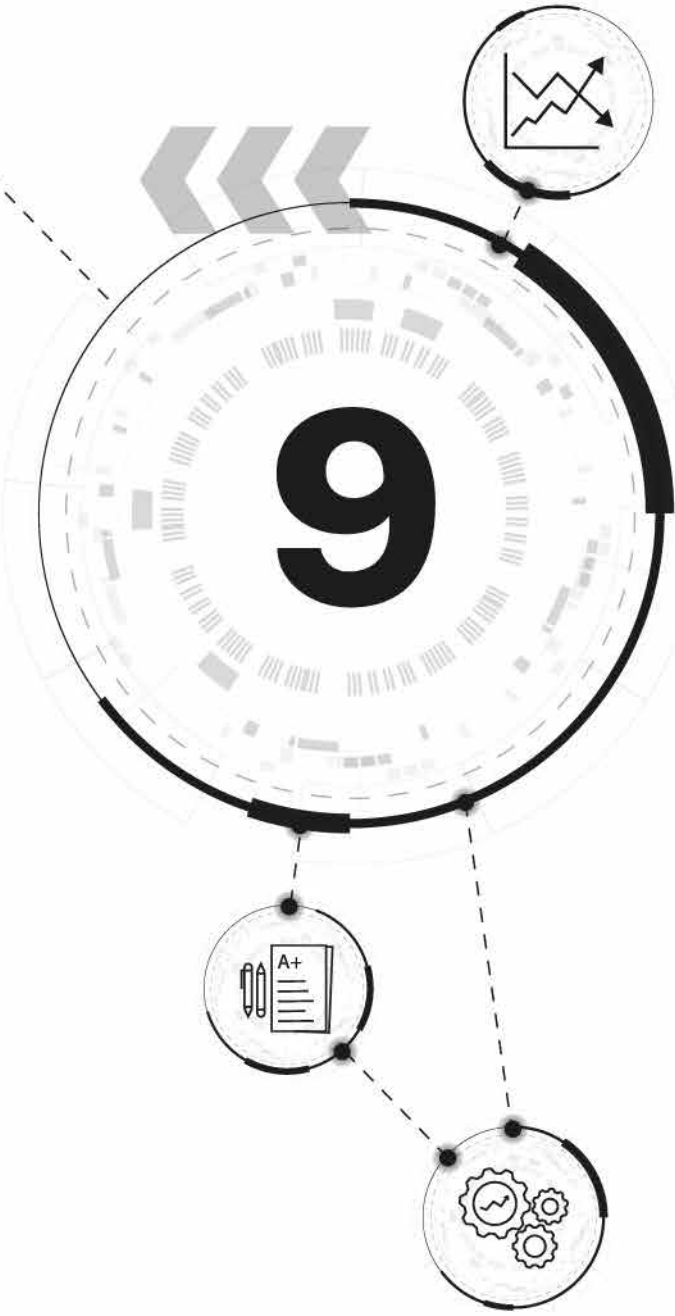
24 For its history see G. Hastings, *It can't happen here: a political history of Australian student activism* (Students' Association of Flinders University, 2003).

25 For its history see E. Bexley, *Twenty-five years of CAPA - the fight is far from over* (Council of Australian Postgraduate Associations, 2004).

26 For the terms of reference and associated policy questions see Australian Government, *Australian Universities Accord discussion paper: February 2023* (Australian Government/ Department of Education, 2023).

27 Australian Government, *Australian Universities Accord interim report* (Department of Education, 2023)

BENEFITS OF HIGHER EDUCATION FOR THE PUBLIC AND EMPLOYERS



9 BENEFITS OF HIGHER EDUCATION FOR THE PUBLIC AND EMPLOYERS

This chapter looks at how well the higher education system meets the needs of the country. Is Australia's population becoming more educated? Are employers' skills needs being met? How good or useful is university research? How does the Australian public perceive the higher education sector?

9.1 A more educated population

As the enrolment figures in chapter 2 suggest, the number of graduates in Australia has increased over time. In 1982, 645,000 people held a degree; by 2022 that number had increased nearly tenfold to 6.1 million.[1] In 2018–19, largely reflecting more postgraduate study, the average graduate held 1.4 qualifications at a bachelor-degree level or above.[2]

The overall bachelor degree or above attainment rate for people aged 15 years or more in 2022 was 32.1 per cent. Half a century earlier, at the time of the 1971 census, only two per cent of the population had a degree.[3]

In 2009, the government set a target of 40 per cent of people aged 25 to 34 years to have a degree by 2025.[4] That figure was achieved in 2019 and stood at 44.9 per cent in 2022. When reported by gender it reflects the imbalance in enrolments that developed from the late 1980s (section 2.3.3). More than half of women (50.3 per cent) hold a bachelor degree or above, compared to 36.6 per cent of men (Figure 38). If Certificate III and above vocational qualifications are included, the gender gap in post-school attainment narrows, to men 69.1 per cent and women 75.7 per cent.

While Australia's population is more educated than previously, this is due to migration as well as local higher education. In 2022, 20 per cent of people with a degree received their highest qualification from an overseas university. This includes international students with bachelor degrees studying postgraduate courses in Australian universities.[5]

1 ABS, *Education and work 2022* (Australian Bureau of Statistics, 2022), table 35. Age 15–69 years in 1982, 15–74 years in 2022.

2 Calculated from ABS, *Qualifications and work, Australia, 2018-19, TableBuilder.*

3 Calculated from ABS, *Education and Work, TableBuilder* and CBCS, *Census of Population and Housing, 30 June 1971, Bulletin 1. Summary of Population* (Commonwealth Bureau of Census and Statistics, 1972). In 2021, an upper age limit of 74 years applied. In 1971, another 3.2 per cent of the population had a tertiary qualification other than a degree. Many of these qualifications were for multi-year initial professional entry courses in fields such as education, accounting and engineering later delivered as bachelor degrees.

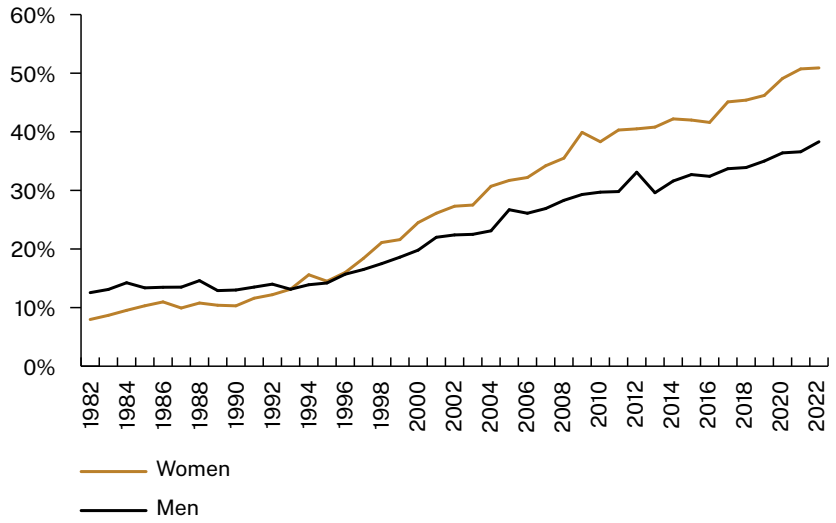
4 DEEWR, *Transforming Australia's higher education system* (Department of Education, Employment and Workplace Relations, 2009), p. 12.

5 Calculated from ABS, *Education and Work, TableBuilder.*

The degree attainment rate for those born in Australia is lower than for the total population. In the 25-to-34-year-old age group, attainment in 2022 was 36.8 per cent, still below the 40 per cent target set in 2009. Low attainment by men, at 30.3 per cent, is the principal reason, with women at 44.2 per cent. In this age group men are more likely to have vocational than higher education qualifications, with 37.5 per cent holding a Certificate III/IV or diploma.[6]

Because women make up a substantial and growing majority of university students (section 2.3.3) this large gender gap in bachelor degree or above qualifications will persist.

Figure 38: Attainment rate of a bachelor degree or higher, men and women aged 25 to 34 years, 1982–2022



Source: ABS, Education and Work.

6 Calculated from ibid.

9.2 Meeting skills needs

In many occupations employers require or prefer staff with university qualifications. The ABS occupational list has 388 mostly managerial or professional occupations rated as needing a university qualification or equivalent experience, known as 'skill-level one'.[7] Higher education and migration supply the labour force with relevant skills. As of May 2022, 3.3 million graduates held jobs in these occupations, 83 per cent of them with degrees from Australian universities.[8]

Current higher education funding policy provides student contribution incentives to enrol in courses the government believes will be 'job ready' (section 7.1). However, enrolments and completions by likely occupational outcomes are mostly not monitored. Only seven of the 388 high-skill occupations typically requiring a university qualification have annual course completions reported: teacher training, aviation and five health-related fields.[9]

Some graduate occupations appear on skills shortage lists. In employer surveys that ran from 1986 to 2018 the number of professional occupations in shortage ranged from one (1993) to 37 (2008) and ended with 12 (2018).[10] In 2022, the equivalent analysis identified 127 professional occupations of the 327 it analysed as in shortage.[11] As has often been the case, health and engineering related occupations were well-represented. Health enrolments in higher education have increased significantly over time (section 2.3.1) while engineering is a boom-and-bust field, both in universities and the labour market.

Skill shortages are often for experienced workers but also create opportunities for new graduates. In 2022, bachelor-degree graduates of several health-related fields had very strong employment outcomes four months after course completion, with more than 90 per cent of those seeking full-time work having found it.[12] Graduate employment is discussed in more detail in section 10.1.

Employers are generally satisfied with the graduates they hire. In a survey of direct supervisors of graduates, 84 per cent were satisfied overall in 2022, with similar satisfaction levels reported each year since 2016.[13]

7 Six-digit occupational classifications: ABS, *Australia and New Zealand standard classification of occupations (ANZSCO), 2021: Australian update* (Australian Bureau of Statistics, 2021).

8 Calculated from ABS, *Education and Work, TableBuilder*. Graduates of Australian universities provided 59 per cent of skill level one employment.

9 DESE, *Selected higher education statistics: Award course completions 2020* (Department of Education, Skills and Employment, 2022), table 14.20.

10 DESE, *Historical list of skills shortages in Australia* (Department of Education, Skills and Employment, 2019).

11 NSC, *Skills Priority List: Key findings report* (National Skills Commission, 2022), p. 8.

12 SRC, *2022 Graduate Outcomes Survey* (Social Research Centre/Department of Education, 2023), p. 11.

13 SRC, *2022 Employer Satisfaction Survey* (Social Research Centre/Department of Education, 2023), p. 3.

9.3 Research performance

As section 5.4 shows, the quantity of research outputs, especially publications, from Australian universities has increased over time. Publication numbers do not measure research quality or significance, but the best Australian research publications are well-regarded internationally. Australian academics are over-represented as authors of the top one per cent of academic publications, as measured by how often these publications are cited by other academics. In 2020, 7.9 per cent of these most-cited publications had an Australian author, down slightly on recent years but up from three per cent in 2000.[14]

Citations contribute to the position universities achieve in international university rankings. One, the Shanghai Jiao Tong Academic Ranking of World Universities (ARWU), focuses exclusively on research performance. Indicators include papers published in high-prestige journals, numbers of high-citation researchers, and winners of Nobel Prizes and Fields Medals (a prestigious mathematics award). The most recent ranks for Australian universities are in Table 6. Six are in the top 100 universities in the world, up from two in the first year of this ranking, 2003. Twenty-four Australian universities are in the top 500 universities.

Table 6: Australian universities in the world top 100, Academic Ranking of World Universities, 2023

University	Ranking
University of Melbourne	35
University of Queensland	51
University of New South Wales	72
University of Sydney	73
Monash University	77
Australian National University	84

Source: ShanghaiRanking Consultancy, ARWU.

More detailed analysis of research performance by university and discipline is available from the Excellence in Research for Australia (ERA) report from the Australian Research Council (ARC). Quality indicators included citations, peer review (other academics assessing the quality of work) and the level of grant income. The ERA also looked at indicators of research volume and activity, of research application (such as patents), and of recognition (for example, a fellowship in a learned academy or editing a prestigious journal).[15]

14 DISER, *Australian Innovation System Monitor* (Department of Industry, Science, Energy and Resources 2021), p. 74.

15 For background on the ERA and rankings see P. Coaldrake and L. Stedman, *Raising the stakes: Gambling with the future of universities (second edition)* (University of Queensland Press, 2016), chapter 6.

In the ERA assessment, fields of research in each university that meet a minimum threshold of outputs are rated from one to five. Ratings one and two indicate research performance that is 'below world standard'. Rating three indicates average performance at world standard. Rating four is above world standard, and rating five is well above world standard. Table 7 shows the results.

On this measure, most research-active disciplines in Australian universities are at least world standard. Most sub-fields in scientific and health research are rated as well above world standard, reflecting the priority they receive in Australian universities (section 5.3). In education and in commerce, top ratings are less common, with a quarter of ratings at below world standard.[16]

Table 7: Excellence in Research for Australia, 2018

Rating	Units of evaluation	Percentage
1 or 2 (low)	148	7.7%
3	448	23.3%
4	553	28.8%
5 (high)	774	40.2%
Total	1,923	100%

Note: A unit of evaluation is a 4-digit field of research at a university.

Source: ARC, State of Australian Research 2018–19.

9.4 Research impact

Policymakers have long believed that while the quality of Australian university research is often high its social and economic impact is too low.[17] This belief is a major reason why university research activity is now much more likely to be 'applied' – aimed at specific objectives – than it was 25 years ago (section 5.3).

16 Using the 4-digit field of research ratings within 2-digit fields 01, 02, 03, 04, 05 and 06 for science, 11 for medical research, 13 for education and 15 for commerce: ARC, *State of university research 2018-19: ERA national report.*

17 S. Morrison, 'Address, National Press Club', *Prime Minister's media centre*, 1 February 2022; J. Clare, 'Second reading speech - Higher Education Support Amendment (Australia's Economic Accelerator) Bill 2022', *Ministers' media centre: Ministers of the Education Portfolio,* 1 December 2022. J. Dawkins, *Higher education: A policy discussion paper* (Australian Government Publishing Service, 1987), p. 65.

Research impact is hard to measure. Academic research is usually just one part of solving problems or creating new products. There are no easy metrics, such as the publications and citations used to assess research quality.

In 2018–19, the ARC, using panels of researchers and research end-users, assessed research engagement and impact by university and discipline. Although this exercise included quantitative indicators, these cannot capture all the ways universities interact with potential users of research or the effects of research. A qualitative assessment led to ratings of high, medium or low. Few low ratings were made, with 34 per cent of engagement and 43 per cent of impact ratings being 'high'.[18]

An ABS business survey found that, in the two years to 30 June 2021, 5.4 per cent of innovating businesses sourced ideas from universities, including their published research. This is equivalent to about 27,700 businesses. The 'health care and social assistance' industry was most likely to report using university research, reflecting the system's focus on medical research (section 5.3).[19]

9.5 Public perceptions

Surveys ask Australians about their confidence in social institutions, including universities. In 2023, 69 per cent of respondents expressed confidence in universities, with 10 per cent having a 'great deal' of confidence and 59 per cent having 'quite a lot of confidence' (Figure 39).

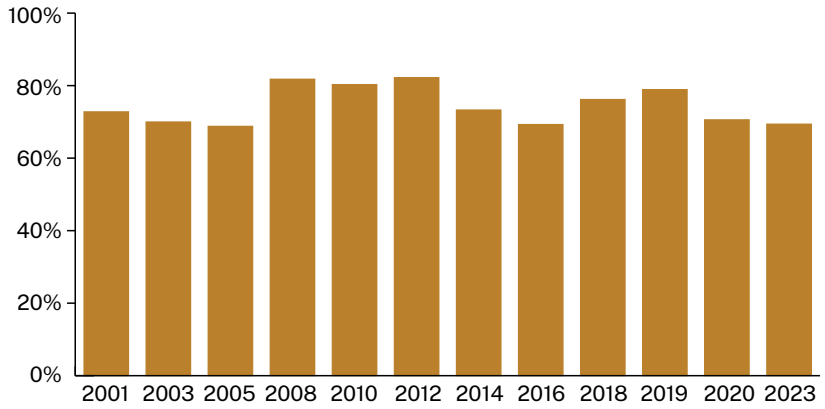
The 2023 confidence results are 10 percentage points below those of 2019, but similar to the levels recorded in 2005 and 2016 (Figure 39). COVID-19 factors could have influenced the recent decline in confidence. Students reported significantly reduced satisfaction with some aspects of their education (section 3.3). Other issues may also have affected public perceptions. In recent years universities have attracted regular negative publicity for underpaying casually-employed staff (section 4.4). Universities are sometimes targets in 'culture wars' debates.[20] Student contribution increases in 2021, although policy driven, may also have affected attitudes (section 7.1).

18 ARC, *Engagement and impact assessment 2018-19: national report* (Australian Research Council, 2019).

19 ABS, *Innovation in Australian business 2020-21.*

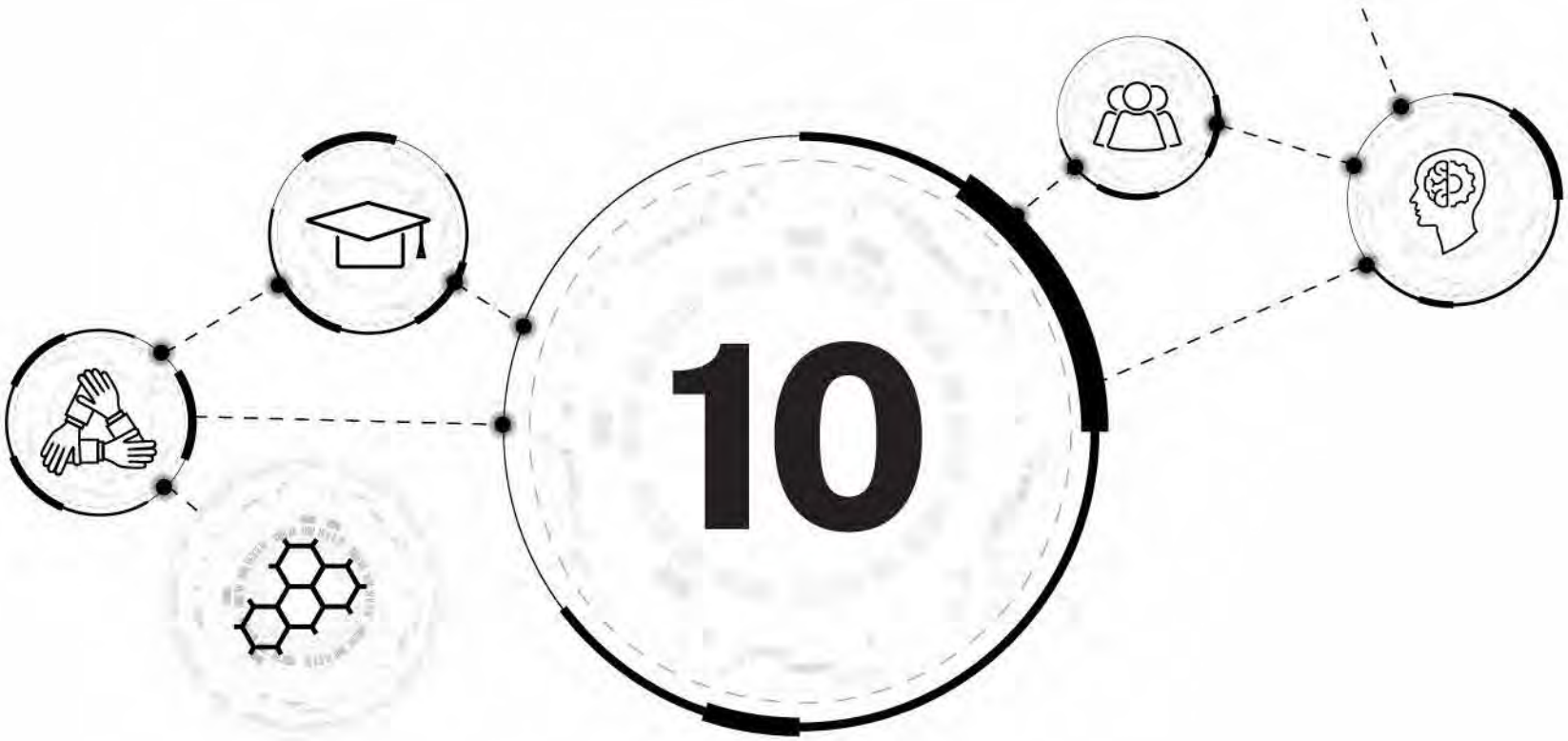
20 M. Wesley, *Mind of the Nation: Universities in Australian life* (La Trobe University Press, 2023)

Figure 39: Public confidence in universities, 2001–2023
A 'great deal' or 'quite a lot' of confidence



Note: Poll respondents who did not answer the question or gave a 'don't know' response omitted from totals.

Sources: Australian Election Study 2001, 2010, 2016. Australian Survey of Social Attitudes 2003, 2005, 2014. ANU Poll 2008, 2019, 2020, 2023. World Values Survey 2012, 2018. Available from the ANU Australian Data Archive.



BENEFITS OF HIGHER EDUCATION FOR GRADUATES

10 BENEFITS OF HIGHER EDUCATION FOR GRADUATES

Students enrol in higher education because they think it will bring them benefits. Only some possible benefits, typically those related to employment and income, are well-researched and so provide content for this chapter.

Material benefits under-explain higher education enrolment. Courses with relatively poor labour market outcomes attract many students (section 2.3.1). In 2020–21, 12 per cent of people who studied a bachelor degree in the last year gave interest or enjoyment as the main reason for study.[1] Some older graduate surveys found large majorities agreeing that their courses were stimulating, but these questions are no longer asked.[2]

Graduates tend to rate more highly than non-graduates on indicators such as health, social connections, and general well-being. The causal connections between higher education and these outcomes can be hard to show – generally they are not express aims of students, universities or higher education policy.[3] As with the financial benefits discussed below, these positive outcomes may be due, at least partly, to other personal and social attributes of individuals with higher education qualifications.

10.1 Graduate employment

Employment outcomes are not the only reason for going to university, but in 2020–21 80 per cent of recent bachelor-degree students gave it as their main reason. They face a more competitive labour market than earlier graduates. Between 1998 and 2022, the proportion of the labour force aged 15 to 64 years with a bachelor degree or above increased from 17 to 37 per cent. For early-career workers aged between 25 and 34 years, the proportion with a degree is higher, at 47 per cent.[4]

In the short-term, large minorities of recent graduates looking for full-time work do not find it, especially during economic downturns. Recessions in the early 1980s and early 1990s increased the proportion of new graduates still looking for full-time work after about four months (Figure 40), as did the end of the mining boom in the early- to mid-2010s. New graduate full-time employment rates reached their lowest ever level in 2014. Although economic recoveries improve short-term graduate outcomes, with the 2022 results the best since 2009, Figure 40 suggests a structural shift towards slower transitions into full-time work.

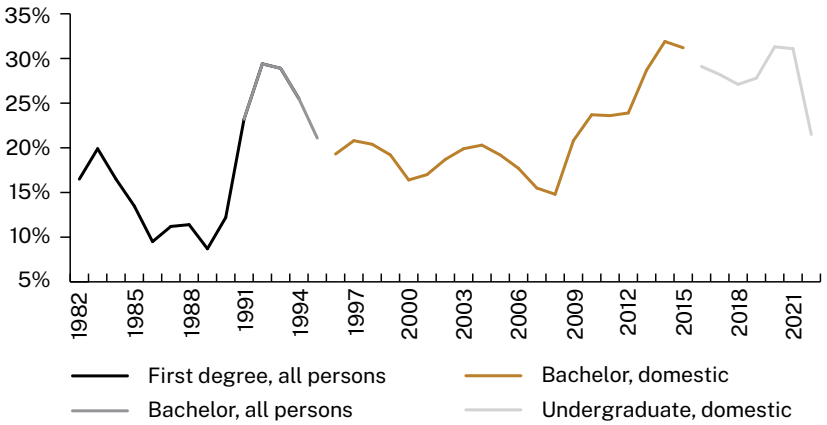
1 Calculated from ABS, *Work-related training and adult learning, 2020-2021, TableBuilder* (Australian Bureau of Statistics, 2022).

2 GCA, *Graduate course experience 2015: a report on the course experience perceptions of recent graduates* (Graduate Careers Australia: Graduate Careers Australia, 2016), p. 20. The Student Experience Survey of current students does however report that most students feel intellectually stimulated by their teachers: SRC, *2022 Student Experience Survey: the higher education student experience*, p. 80.

3 J. Savage and A. Norton, *Non-financial benefits of higher education* (Grattan Institute, 2012).

4 Calculated from ABS, *Education and Work, TableBuilder*. 1998 from ABS, *Transition from education to work, Cat. 6227.0* (Australian Bureau of Statistics, 1998).

Figure 40: Short-term under- and unemployment of graduates looking for full-time work, 1982–2022
Proportion of those available for full-time work, approximately four months out



Notes: Graduates are not necessarily unemployed, because they may have part-time or casual employment. The graduate survey includes increasing numbers of higher education institutions, and this may affect the results.

Sources: Graduate Careers Australia, Graduate Destinations Surveys 1982–2015; Social Research Centre, Graduate Outcomes Survey 2016–2022.

Former international students are less likely to find full-time jobs shortly after completing their courses than domestic graduates.[5]

Short-term employment outcomes vary by field of education. Graduates from health-related courses generally have the least difficulty finding full-time work. Creative arts, humanities and science graduates have the most difficulty.[6] Graduates who were employed while studying (section 3.7.1) or participated in work-integrated learning (section 3.2) have better employment outcomes.[7]

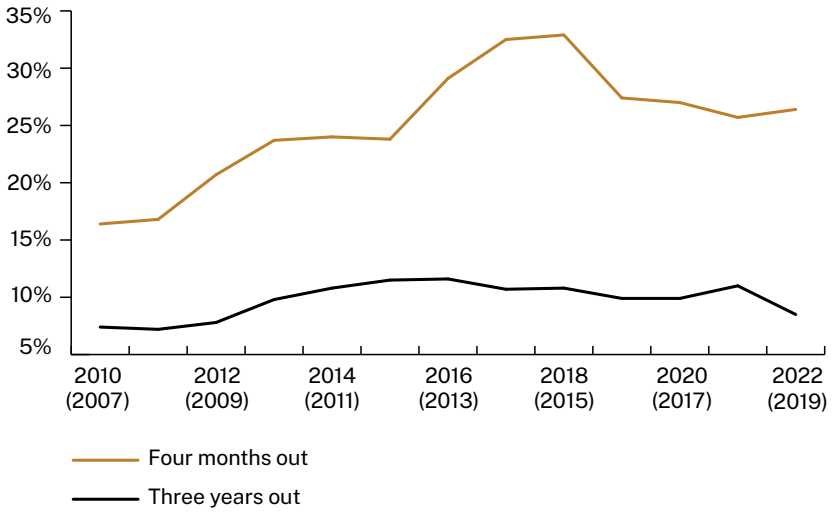
Poor short-term results only moderately translate into longer-term difficulties in finding full-time work. In 2022, the proportion of graduates looking for full-time work three years after completion was only slightly higher than a decade earlier, at 8.5 per cent (Figure 41).

5 SRC, *2022 International graduate outcomes survey* (Social Research Centre/Department of Education, 2023), p. 3.

6 SRC, *2022 Graduate Outcomes Survey*, pp. 11–12.

7 P. Hurley et al., *Industry experiences and their role in education to work transitions* (Mitchell Institute/Victoria University, 2021), pp. 33–38.

Figure 41: Medium-term under- and unemployment of bachelor-degree graduates, 2010–2022
Per cent of those available for full-time work three years out



Notes: Bachelor-degree graduates in first instance. Some acquire postgraduate qualifications by the time the three-year-out survey is conducted. The four-month-out figures differ slightly from those in Figure 40 as only people who responded to both surveys are included in Figure 41.

Sources: Social Research Centre, Graduate Outcomes Survey – Longitudinal since 2016. Earlier years are based on the GCA Beyond Graduation Survey.

Although shorter-term graduate full-time employment has deteriorated since 2009, overall employment rates still exceed those of people with other educational attainment levels, although upper vocational qualification holders also do well (Table 8).

Table 8: Labour force status by educational attainment, 20–64 years old, May 2023

	Bachelor	Diploma	Cert III/IV	Year 12
Unemployed (as % of those in or actively looking for work)	2.5%	2.4%	3.0%	3.8%
Employed (as % of population)	87.3%	84.1%	84%	76.4%

Note: 'Diploma' includes advanced diploma.

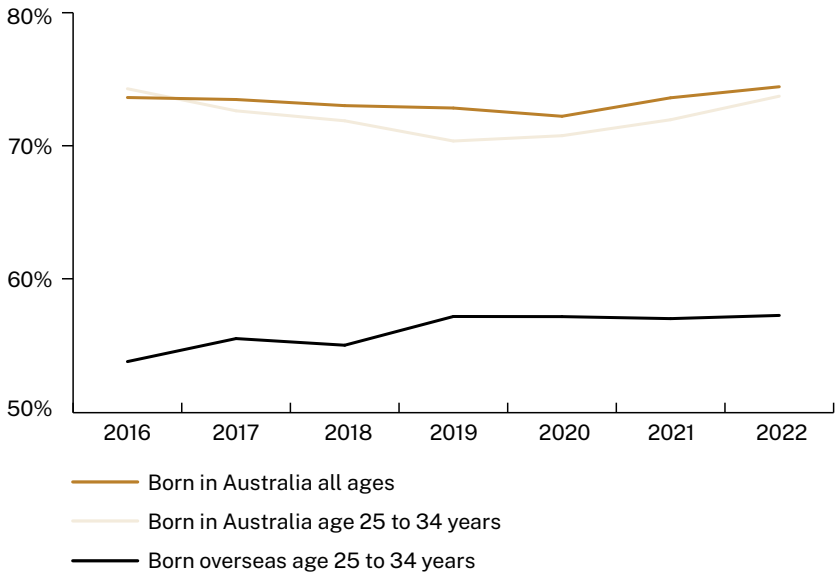
Source: ABS, Labour force, Australia, detailed, table LQ1.

10.2 Skilled work

Most graduates hope that their degree will help them get a better job than otherwise. The number of graduates in ABS skill-level one jobs, which require a degree or equivalent experience, increased each year between 2015 and 2022.[8] A surge in graduate numbers in the 2010s (Figure 17), however, slightly reduced the overall share of graduates in these high-skill occupations before a 2020s recovery. In 2022, just under three-quarters of Australian-born graduates had a skill-level one job (Figure 42). Early-career graduates, aged between 25 and 34 years, have slightly lower rates of skilled employment, reflecting the slow career starts described in section 10.1.

Graduates born overseas have lower rates of skill-level one employment, at less than 60 per cent for early-career graduates. The difficulties former international students have finding work matching their qualifications is one reason for this relatively poor result.[9] Overseas-born graduates with Australian citizenship, which is more attractive to employers than the temporary visas recent graduates often hold (section 10.4), had a high-skill employment rate of 65 per cent in 2022.[10]

Figure 42: Proportion of employed graduates in skill-level one occupations, 2016–2022



Notes: Persons with an occupation only. Includes undergraduate and postgraduate qualifications. Survey month of August. Excludes current students.

Source: ABS, Characteristics of Employment, TableBuilder.

8 Calculated from ABS, *Characteristics of Employment, 2014-2022, TableBuilder.*

9 L. Tran, M. Rahimi and G. Tan, *Temporary graduatification: Impacts of post-study work rights policy in Australia* (Research for Educational Impact/Deakin University, 2019); J. Chew, *Economic opportunities and outcomes of post-study work rights in Australia* (International Education Association of Australia, 2019).

10 Calculated from ABS, *Education and Work, TableBuilder*. A survey conducted in May. Note that this is a different survey and survey month to Figure 42.

Skill classification occupation and qualification alignments do not always match the judgements of recent graduates. In 2022, nearly two-thirds of recent graduates in professional occupations, with few exceptions classified as skill-level one, rated their qualification as 'important' or 'very important' for their current job, suggesting that a large minority do not. Only a small proportion of technical and trade, community and personal service, or clerical and administrative occupations are classified as skill-level one. But around a third of graduates in those employment categories think their qualification is important to their job.[11] Complicating matters further, more employers than graduates rate the graduate's qualification as important to their job.[12]

10.3 Earnings

Slow career starts affect income. Graduates in the 2010s on average earned less than earlier graduates at the same point in their careers, although there is evidence of catch-up over time.[13] For the whole graduate population, an analysis using data over the 1991–2018 period found that average post-tax graduate income peaked in real terms in the early 2010s.[14] Analysis in the 2018 edition of *Mapping Australian higher education* found that between the 2011 and 2016 censuses, median income declined in real terms for male but not female graduates, whose labour force participation rate had increased.[15]

Although graduate earnings prospects softened in the 2010s, people with higher education qualifications on average do better in the labour market than people with vocational or school qualifications. Their employment levels (Table 8) and hourly rates of pay (Figure 43) are higher.

11 One reason for these apparent discrepancies is that graduates can be matched by field but not skill level. For example, 40 per cent of graduates in skill level three and four occupations report that their job and qualification are matched by field: Calculated from ABS, *Qualifications and work, Australia, 2018-19, TableBuilder*.

12 SRC, *2022 Employer Satisfaction Survey*, p. 16.

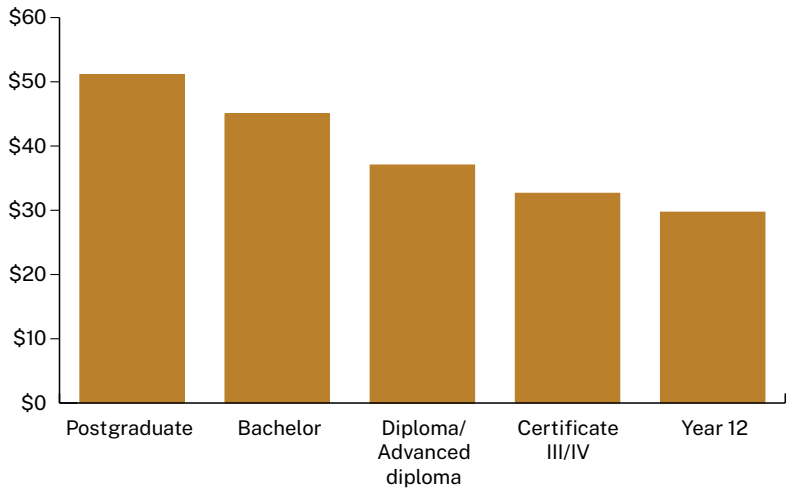
13 R. Wilkins, *The Household, Income and Labour Dynamics in Australia Survey: Selected findings from waves 1 to 15, the 12th annual statistical report of the HILDA survey* (Melbourne Institute of Applied Economic and Social Research, 2017), p. 59; P. Hartigan and J. Hambur, 'Why the real wages of graduates with bachelor's degrees have fallen,' *Treasury Round Up* (October 2022); P. Aungles, H. Hodgson and S. Parbery, *Graduate incomes: insights from administrative data* (Department of Education, Skills and Employment, 2021); D. Andrews et al., *The career effects of labour market conditions at entry* (Australian Treasury, 2020), pp. 12–13.

14 M. Fisher-Post, N. Herault and R. Wilkins, *Distributional national accounts for Australia, 1991-2018* (IZA Institute of Economics, 2022), p. 48. This is based on a measure of 'post-tax national income' which distributes government expenditure. Reasons for graduate trends are not explored in depth. The top 10 per cent of graduate earners lost income share, perhaps another consequence of the end of the mining boom. Increasing numbers of graduates at early stages of their career may also affect the averages.

15 Norton, Cherastidtham and Mackey, *Mapping Australian higher education 2018*, chapter 10.

Research on the 'graduate premium' – the additional income of graduates – typically compares them with people who finished their education at Year 12. At an individual school leaver level, however, this overstates the financial benefits of higher education compared to their realistic choices. Qualifications from vocational courses also attract an earnings premium over finishing education at Year 12 (Figure 43). For school leavers with elevated risk of not securing professional employment, vocational education can be a better financial choice.
This is especially the case for young men, as male-dominated occupations served by vocational education have higher earnings than female-dominated occupations.[16]

Figure 43: Employee median hourly earnings by qualification level, 2022



Note: Main job only.

Source: ABS, Characteristics of Employment, TableBuilder.

16 A. Norton and I. Cherastidtham, *Risks and rewards: when is vocational education a good alternative to higher education?* (Grattan Institute, 2019).

As for employment rates, graduate earnings vary by course taken. This is evident at every career stage, from first job through to lifetime earnings.[17] As with most benefits associated with higher education other factors likely play a role. The ambitions, attributes and abilities that influence course choices and admissions may also affect future earnings. But through their courses, graduates acquire skills and credentials with labour market value. Many occupations are difficult or impossible to enter for people without specific qualifications.

Figure 44 reports annual income ranges for graduates by field of education nine years after course completion. It is ATO-recorded income for graduates who took out HELP loans. It shows the 25th percentile, at which three-quarters of graduates in this field earn more than the amount shown; the median, at which point half of graduates in the field earn more than the amount shown, and the 75th percentile, at which point a quarter of graduates in the field earn more than the amount shown. The ranges highlight what the medians and averages typically used in 'returns to education' research obscure – that incomes vary significantly within as well as between fields of education.[18]

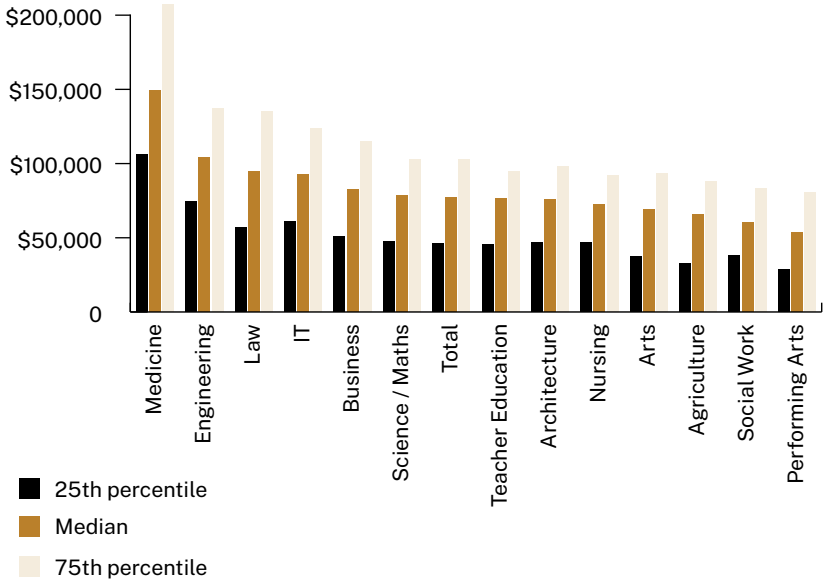
Of the fields shown in Figure 44, medical graduates earned the highest median income in 2017–18 of $149,500, while performing arts graduates received the lowest median income of $53,700.[19] In most disciplines, a graduate at the 75th percentile earned 30 to 40 per cent more than the median graduate. The relationship between the 25th percentile and the median was more varied. Medical and engineering graduates at the 25th percentile earned more than most graduates in nursing, arts, agriculture, social work or performing arts. Those fields, except nursing, have a group of graduates with low income relative to the median in their field. Financially, students in these fields take on risk; a relatively high chance of low earnings and a relatively low chance of high earnings.

17 SRC, *2022 Graduate Outcomes Survey*; A. Daly et al., 'The private rate of return to a university degree in Australia,' *Australian Journal of Education* 59 (2015); Norton, Cherastidtham and Mackey, *Mapping Australian higher education 2018*, chapter 10.

18 However, career income variation is likely to be lower than shown in Figure 44 due to fluctuations in personal income.

19 The lowest median for a sub-field is $38,600 for 'philosophy and religious studies', probably influenced by priests and other religious workers. The detailed data is from a spreadsheet accompanying Aungles, Hodgson and Parbery, *Graduate incomes: insights from administrative data* and available on the QILT website.

Figure 44: Bachelor-degree income by field nine years after graduation, 2017–18 financial year



Note: Total includes fields not shown.

Source: Department of Education, Graduate incomes: insights from administrative data.

New bachelor-degree graduates from more prestigious universities do not report higher starting salaries.[20] Their course choices and lower average ages compared to graduates of other universities affect these results, but studies controlling for these and other factors known to influence wages also find no or only minor short-term financial advantages to attending a higher prestige university.[21] However, another study found that Group of Eight graduates suffered a lower earnings penalty from graduating into a period of rising youth unemployment.[22] A small earnings premium associated with attending a more prestigious university is evident later in graduate careers.[23]

20 SRC, *2022 Graduate Outcomes Survey*, pp. 16–18.

21 I. Cherastidtham and A. Norton, *Effects of university prestige and courses on graduates' earnings* (Grattan Institute, 2014), pp. 11–13 and the references cited there; Aungles, Hodgson and Parbery, *Graduate incomes: insights from administrative data*, pp. 43–46.

22 Andrews et al., *The career effects of labour market conditions at entry*, pp. 18–19.

23 Aungles, Hodgson and Parbery, *Graduate incomes: insights from administrative data*, pp. 49–52; Cherastidtham and Norton, *Effects of university prestige and courses on graduates' earnings*, pp. 14–17.

Growing numbers of Australians have an incomplete bachelor degree (section 3.6). Whether this nevertheless confers financial benefits has not been explored in depth.[24] One ABS survey asks about incomplete qualifications. Forty per cent of people with an incomplete bachelor degree in 2018–19 held a vocational diploma or Certificate III/IV. Their median income was 11 per cent higher than other people with those vocational qualifications but no incomplete bachelor degree. The median income of people with Year 12 as their highest qualification was 31 per cent higher if they had an incomplete bachelor degree. Much of this benefit came from labour force participation levels rather than pay rates.[25]

10.4 Migration

For many international students, possible migration is one reason for choosing Australian higher education. In 2022, 70 per cent of international students rated the 'possibility of migrating to Australia' as an important reason for choosing Australia. Of the two largest international student source countries, this reason is given more frequently by Indian (77 per cent) than Chinese (52 per cent) students.[26]

International students can remain in Australia after completing their degree. The subclass 485 temporary graduate visa allows stays of varying length based on the qualification held:

- bachelor degree, two years
- masters degree, three years
- doctorate, four years.

Subclass 485 visa holders can work in any occupation. Graduates with degrees in specified skills shortage areas can stay for an additional two years.[27]

In May 2023, 142,364 former international students on subclass 485 visas were present in Australia.[28] Former Indian students were the largest group, at 37 per cent of the total, with former Nepalese students the second largest group at 14 per cent. Former Chinese students made up 11 per cent of the total, reflecting less interest in migration and Chinese government travel restrictions.

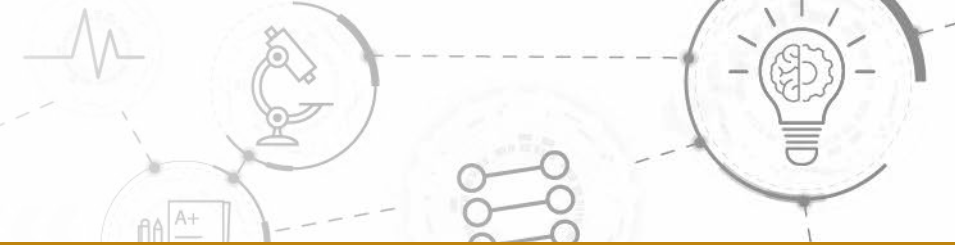
24 If done with the ATO–Department of Education dataset used to produce the Figure 44 results, it could take account of relevant information such as ATAR, field of education, and how many subjects were successfully completed prior to dropping out.

25 Calculated from ABS, *Qualifications and work, Australia, 2018-19, TableBuilder*.

26 SRC, *2022 Student Experience Survey: the international student experience*, pp. 32–33.

27 DofE, *CRICOS courses eligible for extended post-study work rights* (Department of Education, 2023).

28 DHA, *Temporary entrants visa holders pivot table* (Department of Home Affairs/data.gov.au, 2023). Primary visa holders only. Another 52,519 people were secondary visa holders, usually partners and children.



For points-tested permanent migration programs, former international students must have an occupation on a skilled occupation list. Points are available for an Australian education qualification, studying in a regional area, and a 'professional year' of vocationally specific training.[29] International students favour courses leading to occupations rewarded by the migration system (section 2.4.4). Engineering, IT and accounting related occupations are the most frequently nominated by former international students expressing interest in a points-tested visa.[30]

On census night 2021, 587,510 former international students were present in Australia who had arrived since 1 January 2000 and achieved permanent residence.[31] The government releases annual data on direct movements from student or temporary graduate visas to permanent visas. In each of the last two financial years, nearly 43,000 former international students achieved permanent residence or were on a pathway to permanent residence via these routes.[32] Former students also achieve permanent residence via other temporary visas, but this number is not reported.

29 For discussion of these programs see B. Coates, H. Sherrell and W. Mackey, *Rethinking permanent skilled migration after the pandemic* (Grattan Institute, 2021), pp. 65–70, 89–91.

30 Calculated from DHA, *SkillSelect: Dashboard results table, EOI by visa type and status* (Department of Home Affairs, 2023).

31 ABS, *Permanent migrants in Australia* (Australian Bureau of Statistics, 2023), table 8. This includes non-higher education international students.

32 DHA, *Student visa and temporary graduate visa program report* (Department of Home Affairs, 2022). This report lists visas which require manual classification into temporary and permanent. Due to an 'other' category a precise number is not possible. The total includes provisional visas that lead to a permanent visa if conditions are met, what this report calls 'pathway' visas. Government reports vary in how they appear to count provisional visas as 'permanent' or not. In this report 2021–22 total: definite permanent visa = 18,318, provisional partner visa = 13,854, other provisional = 10,220. The latter group is mostly regional skilled visas.

The total number of transitions to permanent residence via student or temporary graduate visas is up in recent years. But with international student enrolments increasing significantly in the 2010s (section 2.4), the chance of achieving permanent residence has gone down. For international students who commenced study in the 2020s, 12 per cent were permanent residents six years after arrival, half the rate of those who arrived in the second half of the 2010s.[33] This may partly reflect more circuitous routes through the migration system. Since the 2000s, it has become harder for student visa holders to move directly to permanent residence, but easier to stay in Australia on a temporary graduate visa, leaving more time to qualify for a work-related or partner permanent visa.[34]

The government wants 'simpler, faster pathways' to permanent residence for former international students with 'special skills and capabiltiies we need'.[35] But rates of achieving permanent residence are unlikely to increase. The annual number of permanent visas is always capped, while there is no upper limit on student or temporary graduate visas. Since the 2000s, a much larger international student population – as it remains despite COVID-19 (Figure 10) – has competed for places in a slightly larger permanent migration program. The goals of higher international enrolments and higher rates of permanent residence cannot be achieved simultaneously. Although many former international students achieve their goal of permanent residence, disappointment for some is inevitable.

33 B. Coates, T. Wiltshire and T. Reysenbach, *Australia's migration opportunity: how rethinking skilled migration can solve some of our biggest problems* (Grattan Institute, 2022), pp. 37–38.

34 For the history of visa changes to 2015 see Spinks and Koleth, *Overseas students: immigration policy changes 1997–2015*.

35 C. O'Neill, 'National Press Club address - Australia's migration system', *The Hon. Clare O'Neil MP, Minister for Home Affairs, Media hub*, 27 April 2023.

GLOSSARY

ABS	Australian Bureau of Statistics
Applied research	Research undertaken primarily to acquire new knowledge with a specific application in view
AQF	Australian Qualifications Framework
ANZSCO	Australian and New Zealand Standard Classification of Occupations
ARC	Australian Research Council
ARWU	Academic Ranking of World Universities
ASCED	Australian Standard Classification of Education
ASIO	Australian Security Intelligence Organisation
ATAR	Australian Tertiary Admission Rank
ATN	Australian Technology Network (interest group)
ATO	Australian Taxation Office
Attrition	Leaving without completing a course.
Block grant	Flexible grant for a general purpose, e.g. CGS, RTP, RSP

CAPA	Council of Australian Postgraduate Associations
Census date	The date when students become liable for student contributions or fees
CEQ	Course Experience Questionnaire
CGS	Commonwealth Grant Scheme
CISA	Council of International Students Australia
Commonwealth contribution	The federal government's tuition subsidy
Commonwealth-supported student	A student eligible for CGS funding
Coursework	Courses without a major research component
CPI	Consumer Price Index
CRICOS	Commonwealth Register of Institutions and Courses for Overseas Students
DFAT	Department of Foreign Affairs and Trade
DNER	HELP debt not expected to be repaid
DofE	Department of Education

Doubtful debt	HELP debt not expected to be repaid
Dual sector university	University with a TAFE
EFTSL	Equivalent full-time student load
Enabling course	A preparatory academic program
ERA	Excellence in Research for Australia
Experimental development research	Research using existing knowledge gained from research or practical experience, which is directed to producing new materials, products, devices, policies, behaviours or outlooks
FEE-HELP	HELP for full-fee students
FTE	Full-time-equivalent (usually staff)
Full-fee student	A student with no government subsidy
Full-time-equivalent	For students, the amount of study expected in a normal academic year. For staff, the number of work hours expected of a full-time staff member
Full-time student	EFTSL subjects of 75 per cent or more of the number of subjects expected in a normal academic year

Funding agreement	Document that sets out each higher education provider's CGS funding
Funding cluster	A group of disciplines with the same Commonwealth contribution
GCA	Graduate Careers Australia
Graduate premium	Extra income of a graduate over another educational level, usually Year 12
Group of Eight	Interest group for Australia's eight most research-intensive universities
HERDC	Higher Education Research Data Collection
HECS	Higher Education Contribution Scheme
HECS-HELP	HELP for Commonwealth-supported students
HELP	Higher Education Loan Program
HILDA	Household, Income and Labour Dynamics in Australia Survey
IELTS	International English Language Testing System
IHEA	Independent Higher Education Australia (interest group)

IRLSAF	Indigenous, Regional and Low SES Attainment Fund
IRU	Innovative Research Universities (interest group)
IT	Information technology
ITECA	Independent Tertiary Education Council Australia (interest group)
Load	Subjects taken, expressed in full-time-equivalent terms
LMS	Learning management system
MBGA	Maximum basic grant amount
Microcredential	A short non-AQF course for which the student receives some recognition
MRFF	Medical Research Future Fund
NHMRC	National Health and Medical Research Council
NPILF	National Priorities and Industry Linkage Fund
NTEU	National Tertiary Education Union
NUHEI	Non-university higher education institution
NUHEP	Non-university higher education provider
NUS	National Union of Students
OPM	Online program manager
OS-HELP	HELP to finance overseas study
OUA	Open Universities Australia
Over-enrolment	CSPs enrolled without CGS funding
Part-time student	EFTSL subjects of less than 75 per cent of the number of subjects expected in a normal academic year
Pathway college	Institution specialising in diploma-level courses aimed at facilitating entry to university courses
Pure basic research	Research to acquire new knowledge without looking for long-term benefits other than advancing knowledge
QILT	Quality Indicators for Learning and Teaching
RSP	Research Support Program
RTP	Research Training Program

RUC	Regional university centre
RUN	Regional Universities Network (interest group)
SA-HELP	HELP for the student amenities fee
SES	Socioeconomic status
SES	Student Experience Survey
SLE	Student Learning Entitlement
START-UP HELP	HELP for students working on business start-up ideas
STEM	Science, technology, engineering and mathematics
Strategic basic research	Research in specified areas in the expectation of practical discoveries
Student contribution	The charge paid by a student in a Commonwealth-supported place
Student place	In funding contexts, one EFTSL
Sub-bachelor	Undergraduate certificate, diploma, advanced diploma and associate degree courses

TAC	Tertiary admissions centre
TAFE	Technical and further education
TDA	TAFE Directors Australia (interest group)
TEQSA	Tertiary Education Quality and Standards Agency
Under-enrolment	Enrolling fewer CSPs than supported by the CGS allocation in a university funding agreement
VET	Vocational education and training
WIL	Work-integrated learning

APPENDIX A – HIGHER EDUCATION PROVIDERS OFFERING HELP LOANS

Universities

Group of Eight
Australian National University
Monash University
The University of Adelaide
The University of Melbourne
The University of New South Wales
The University of Queensland
The University of Sydney
The University of Western Australia

Regional Universities Network
Central Queensland University
Charles Sturt University
Federation University Australia
Southern Cross University
The University of New England
University of Southern Queensland
University of the Sunshine Coast

Australian Technology Network of Universities
Curtin University of Technology
Deakin University
RMIT University
The University of Newcastle
University of South Australia
University of Technology, Sydney

Innovative Research Universities
Flinders University
Griffith University
James Cook University
La Trobe University
Murdoch University
University of Canberra
Western Sydney University

Specialist university
University of Divinity*

Overseas university
Carnegie Mellon University*

Non-aligned
Australian Catholic University
Avondale University*
Bond University
Charles Darwin University
Edith Cowan University
Macquarie University
Queensland University of Technology
Swinburne University of Technology
Torrens University Australia*
University of Notre Dame, Australia
University of Tasmania
University of Wollongong
Victoria University

*=not a member of Universities Australia

Notes: Updated June 2023.

University name changes in the last decade:

- *Federation University Australia was the University of Ballarat until 2014.*
- *Western Sydney University was the University of Western Sydney until 2016.*

Sources: TEQSA National Register and interest group websites.

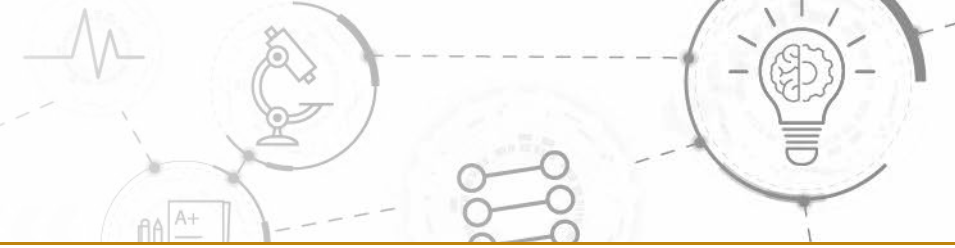
University colleges
Alphacrucis University College
Australian Film, Television and Radio School
Australian College of Theology
Moore Theological College
National Institute of Dramatic Art
Sydney College of Divinity

Institutes of higher education offering FEE-HELP
Academy of Information Technology
Academy of Music and Performing Arts
Adelaide Central School of Art
Adelaide College of Divinity
AIBI Higher Education
AIE Institute
Asia Pacific International College
Aspire Institute
Australasian College of Health and Wellness
Australian Chiropractic College
Australian College of Applied Psychology*
Australian College of Nursing
Australian College of Physical Education
Australian Guild of Music Education
Australian Institute of Business

Institutes of higher education offering FEE-HELP
Australian Institute of Management
Australian Institute of Music
Australian Institute of Professional Counsellors
Australian Performing Arts Conservatory
Batchelor Institute of Indigenous Tertiary Education*
BBI The Australian Institute of Theological Education
Box Hill Institute
Cairnmillar Institute*
Campion College Australia
Canberra Institute of Technology
Canterbury Institute of Management
Chartered Accountants Australia and New Zealand
Chisholm Institute
Christian Heritage College
Collarts

Institutes of higher education offering FEE-HELP
College of Law*
Crown Institute of Higher Education
Curtin College
Deakin College
Eastern College Australia
ECA College of Health Sciences
Edith Cowan College
Endeavour College of Natural Health
Engineering Institute of Technology
Excelsia College*
Eynesbury College

Institutes of higher education offering FEE-HELP
Gestalt Therapy Brisbane
Griffith College
Health Education and Training Institute
Higher Education Leadership Institute
Holmes Institute
Holmesglen Institute
ICHM
Institute for Emotion Focused Therapy
Ikon Institute of Australia
ISN Psychology
Jazz Music Institute
JMC Academy
Kaplan Business School*
Kaplan Higher Education
Kent Institute Australia



Institutes of higher education offering FEE-HELP
King's Own Institute
La Trobe College Australia
LCI Melbourne
Le Cordon Bleu Australia
Leo Cussen Centre for Law
Macleay College
Marcus Oldham College
Melbourne Institute of Technology
Melbourne Polytechnic
MIECAT
Monash College
Morling College
Nan Tien Institute
National Art School
National Institute of Organisation Dynamics Australia

Institutes of higher education offering FEE-HELP
Ozford Institute of Higher Education
Perth Bible College
Photography Studies College
Russo Institute of Higher Education
SAE Institute*
S P Jain School of Global Management
South Australian Institute of Business and Technology
Southern Cross Education Institute (Higher Education)
Stanley College
Stott's Colleges
Sydney Institute of Business and Technology
Sydney Institute of Traditional Chinese Medicine
Tabor Adelaide
Tabor College NSW
TAFE NSW Higher Education

Institutes of higher education offering FEE-HELP
TAFE Queensland
TAFE South Australia
Think: Colleges
Top Education Institute*
Universal Business School Australia
UOW College Australia
UTS College
Victorian Institute of Technology
Wentworth Institute
Whitehouse Institute of Design
William Angliss Institute

* Denotes self-accrediting institutions

Notes: Updated June 2023. Trading names used, or company name if numerous trading names in the market.

Source: TEQSA National Register, StudyAssist list of FEE-HELP providers, FEE-HELP approval legislative instruments.

APPENDIX B – HIGHER EDUCATION PROVIDERS NOT OFFERING HELP LOANS

Institutes of higher education not offering FEE-HELP
Academies Australasia Polytechnic
Adelaide Institute of Higher Education
AIH Higher Education
Analytics Institute of Australia
Apex Higher Education
Australasian College of Dermatologists
Australian Data Institute
Australian Industrial Systems Institute
Australian Institute of Advanced Technologies
Australian Institute of Police Management
Australian Institute of Technology and Commerce
Australian International Institute of Higher Education
Australian School of Accounting
Bureau of Meteorology Training Centre
Centre for Pavement Engineering Education
Churchill Institute of Higher Education

Institutes of higher education not offering FEE-HELP
CIC Higher Education
Danford Higher Education
Edvantage Institute Australia
Elite Education Institute
EQUALS International
Gateway Business College
Global Academy of Technology
Global Higher Education
Governance Institute of Australia
IIA-Australia
Institute of Health & Management Pty Ltd
Institute of Innovation, Entrepreneurship and Technology
International Institute of Business and Technology Australia
Kollel Beth HaTalmud Yehuda Fishman Institute
Leaders Institute
Lincoln Education Australia

Institutes of higher education not offering FEE-HELP
Lyons College
Mayfield Education
Melbourne Institute of Higher Education
Metavision Institute
Montessori World Educational Institute (Australia)
National Academy of Professional Studies
Polytechnic Institute Australia
Sheridan Institute of Higher Education
Southern Academy of Higher Education
Southern Cross Institute
Sydney Imperial Polytechnic Institute
Sydney Institute of Higher Education
Sydney International School of Technology and Commerce
Sydney Met
Texila College Australia
The Institute of International Studies

Institutes of higher education not offering FEE-HELP
The Tax Institute Higher Education
Universal Higher Education
Victorian School of Commerce
Western Sydney University International College

Notes: Updated June 2023. Trading names used, or company name if numerous trading names in the market.

Source: TEQSA National Register.

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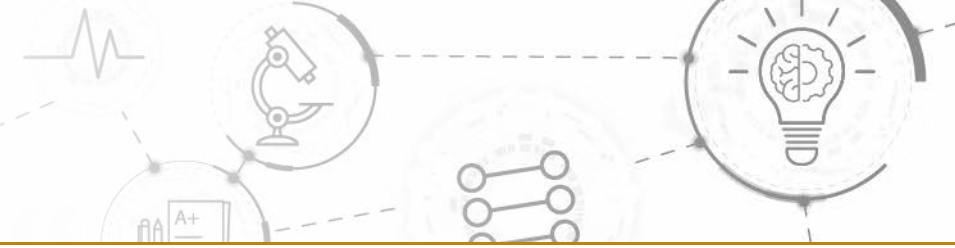

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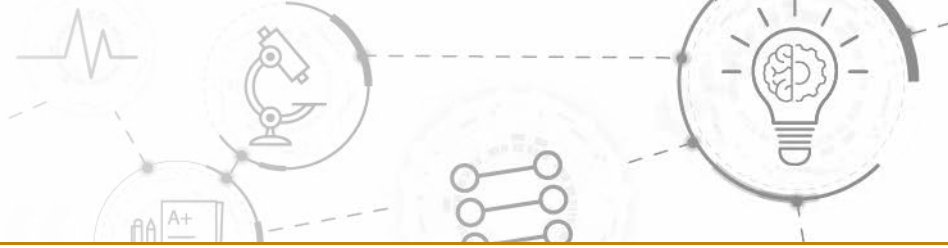

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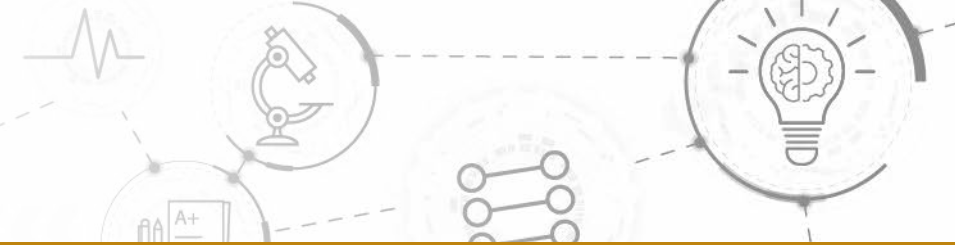

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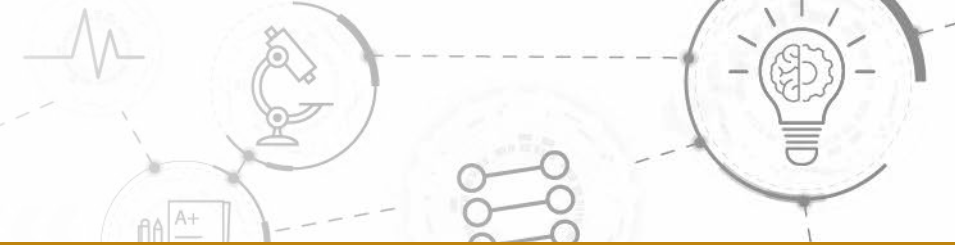

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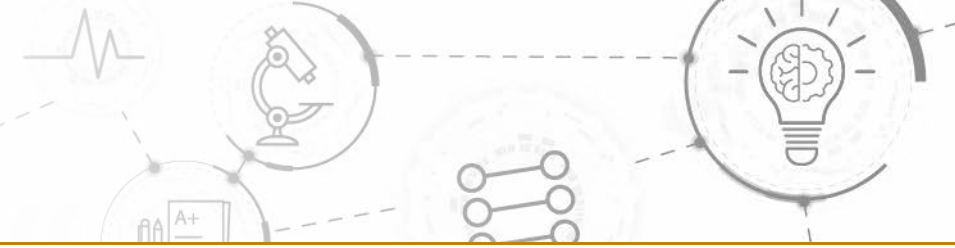

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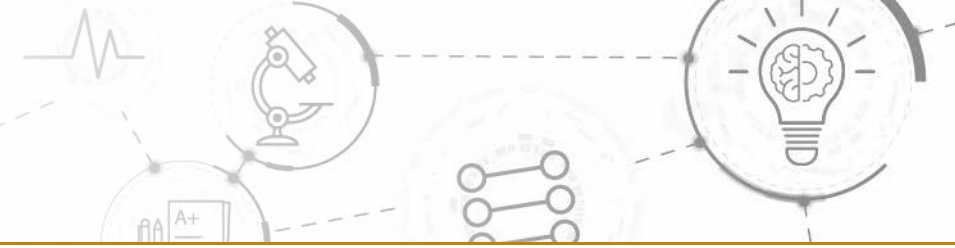

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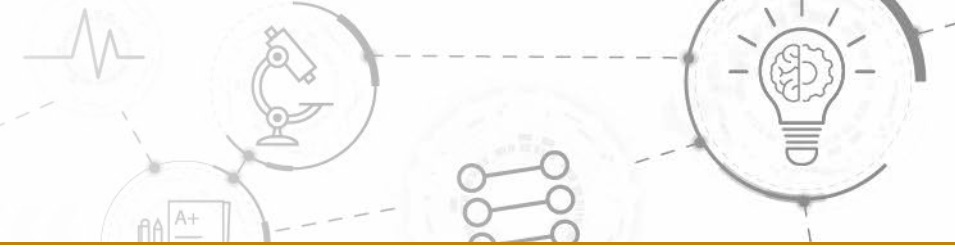

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