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The International Education¹ Market - Australia

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Executive Summary

Australia has been a destination for international students for several decades following the introduction in 1986 of federal government legislation that allowed universities to recruit full-fee international students. Indeed, the international student program has grown across all sectors during this period, from some 13,000 students to almost 384,000 international students in 2006. At present, the \$9.5-billion² international education market constitutes Australia's fourth-largest source of export income.

Australia's federal government supports international education through the Department of Education, Science and Training (DEST), its international arm, Australian Education International (AEI), the Department of Immigration and Citizenship (DIAC) and the Department of Foreign Affairs and Trade (DFAT), through its trade support organization AUSTRADE.

The AEI administers the Educational Services for Overseas Students (ESOS) Act and its accompanying National Code of Practice. The ESOS Act is highly detailed legislation which is intended to protect the interests of international students in Australia. The ESOS Act sets out operational and criminal sanctions against providers that attempt to operate outside the law.

Australians typically do not travel overseas to become educated, although approximately 2,000 students travel to complete postgraduate degrees, particularly doctoral degrees in the United Kingdom, the United States and Canada.

With the increase in bilateral student exchanges during the past 20 years, Canada has become a popular exchange destination; indeed, it is a favorite choice for many Australian university students. Australian students are similar to Canadian students (although unlike American students) in that there is no tradition of seeking fee-based education abroad for any length of time, i.e. summer, semester or year-long programs. There are signs, however, that this may be changing.

Australia is a small market: Australian students represent less than 1% of international students in Canada. Nevertheless, opportunities exist to develop the Australian market through promotional and co-operative activities.

The United States and the United Kingdom are the main competitors; each invests considerably more resources than does Canada in developing the Australian market.

Opportunities

Australia's international education market is small; only 1% of Canada's international student population comes from the Oceania region. Given such small numbers, using a statistical approach to analyze the market could be misleading; it is more useful instead to provide a practical framework comprising potential opportunities that Canadian institutions, provinces and consortia may wish to consider.

The market can be divided into two primary segments: domestic students (Australian citizens and permanent residents) and international students (overseas students holding Australian student visas). While the same marketing approach will often apply to each, in some cases efforts will need to be tailored for a particular segment. The international student group is, by definition, mobile, pays full fees and in many cases makes decisions about education destinations based on immigration policies of host countries. There is a growing sense among domestic students that they are global citizens, and this sentiment is supported by the AEI in the form of institutional support for student mobility.

Citizens of New Zealand may study in Australia under modified rules for Australian citizens; this is possible because of the free trade agreement between the two countries.

While opportunities for growth exist for both market segments, it is the international student group that offers the most potential, particularly those who have completed secondary school, pathway and diploma programs, and undergraduate programs. Bilateral exchanges and other forms of education involving student mobility may be starting points that Canada can leverage to attract both domestic and international students from Australia.

Institutions and other stakeholders seeking to penetrate the market should understand there will be no quick returns; a long-term vision is needed to build strong and sustainable co-

operative and commercial links with Australia.

Student Recruitment

The following information on student recruitment to Canada from Australia has been provided by Citizenship and Immigration Canada, through the Canadian Consulate General in Sydney.

Student Permits 2005-2006

Australia issued 653 study permits for the 2006 calendar year, down 6% from 694 permits issued in 2005.

Study Permits Issued in Australia

Immigration Status	2005	2006
Domestic		
EXCHANGE	272	228
FFS	91	79
ACCDEP	112	111
Unspecified	5	8
Subtotal	480	426
International		
EXCHANGE	63	81
FFS	90	90
ACCDEF	35	41
Unspecified	26	15
Subtotal	214	227
All Study Permits		
EXCHANGE	335	309
FFS	181	169
ACCDEP	147	152
Unspecified	31	23
TOTAL	694	653

ACCDEP: Accompanying dependents

In 2006, 65% of all study permits were issued to domestic students, and 35% to international students. Student exchanges accounted for 47% of the total number of study permits issued, down slightly from 48% in 2005. In 2006, student exchange permits issued to Australians declined by 16%, but increased 28.5% for international students leaving Australia on exchange.

The data for the exchange category only includes Australians studying in Canada for more than 6 months; permits are not required for student exchanges of shorter duration.

In 2006, the total number of permits issued to full fee students (FFS) declined by 6% compared to the same period in 2005. The number of Australians issued with FFS study permits declined 13% in 2006. International FFS remained the same (90) for both years.

This contrasted with the period 2004 to 2005, when there was an overall increase of 46% in FFS with a 25% rise in domestic students and a 76% increase in international students.

Domestic and International Student Numbers		
Country	2005	2006
Australia	91	79
PRC	23	18
New-Zealand	22	105
Fiji	14	20
France	11	9

The majority of students leaving Australia on exchange in 2006 came from the states of Victoria (21%), New South Wales (NSW) (19%), Queensland (13%) and from New Zealand (NZ) (19%).

NSW, New Zealand, and Victoria accounted for over one half of the students in the full fee category. In total, 20% of all study permits issued were from NSW, 17% from Victoria, 17% from New Zealand, 12% from Queensland, 9% from South Australia and 7% from Western Australia.

The majority of students issued with study permits from Australia and destined for Canada studied in Ontario (34%); British Columbia (30%); Quebec (13%); and Alberta (13%). Close to one half of the study permits issued to students destined for Alberta were in the Accompanying Dependents category, i.e. children accompanying their parents on job postings.

The most popular Canadian provinces for exchange students were Ontario (36%), British Columbia (30%) and Quebec (17%); however, in the FFS category, British Columbia was the most popular destination (37%), followed by Ontario (27%), Quebec (16%) and Alberta (9%).

Enquiries

Although program enquiries do not necessarily equate with enrolment, they nevertheless provide guidance as to which market segments hold promise.

In 2006, most (90%) of the enquiries from prospective students in Australia interested in studying in Canada were for undergraduate degree programs, up slightly from 2005. The number of enquiries about postgraduate programs increased 54%.

The most requested programs included Business Administration/Management (14%), Medical and Health Sciences (11%), Natural Sciences (11%), Fine and Applied Arts (10%), Physical Education, Recreation, Leisure (9%), and Engineering and Technology (9%).

Almost all (99%) students preferred to study in English. Students enquiring about French language training were interested in intensive programs of short duration to complement their main program of study.

In 2006, approximately one half of all enquiries (3,498 total) were for programs of less than six months duration (mostly student exchanges) whereas in 2005, only one third of all enquiries were for such programs. In 2006, a very small fraction (1%) of enquiries was aimed at programs of 7-12 months duration, down from 8% in 2005. In 2006, enquiries for programs exceeding 12 months duration accounted for one half of all program enquiries, down slightly from 2005.

K-12

The K-12 international student market in Australia is insignificant. In 2006, approximately 25,000 international students were enrolled in both public and private schools in Australia; it is unlikely that significant numbers of students in this category would switch countries to attend school.

Nevertheless, opportunities exist for individual Canadian schools or secondary education systems to forge links with their Australian counterparts to promote bilateral exchanges between students and teachers, short study visits and long-term fee-based study programs. Recruitment could target international students in Australia considering pathway, (i.e. post-secondary education leading to university entry following satisfactory completion of a one or two-year formal program) or direct-entry options into university or colleges after year eleven or twelve.

A number of organizations promote bilateral exchanges involving Australian K-12 students.

Community College, Technical Institute and CEGEP

Few opportunities exist to recruit vocational students in Australia; neither is there a tradition of students in vocational institutions in Australia traveling overseas on exchange or for short programs. Institutions can, however, build relationships with Technical and Further Education Colleges (TAFE) institutions in Australia to encourage student exchange, short-program development and articulation.

Articulation of international students in Australia into university pathway programs is a recruitment opportunity, particularly through agents and dual qualification arrangements with TAFE institutions.

University (Undergraduate)

There are specific student groups that institutions prepared to make long-term investments may wish to target.

For example, Canadian universities are a preferred destination by a significant number of Australian university exchange students. Anecdotal evidence suggests, however, that Australian universities with the largest cohorts of exchange students have difficulty placing students in Canada because of the need to balance the number of students coming to Canada with the number of students going to Australia and are therefore interested in widening their partnerships.

Potential markets for Canadian universities and colleges include domestic students considering full fee university placement, international and domestic students in university pathway programs and TAFE diplomas, International Baccalaureate (IB) students and international students in short diploma and certificate programs. Ideally, university student recruitment should begin in the period leading up to the start of the academic year. Advertising campaigns involving the media and information sessions (particularly during the university open days in August) could be beneficial as could developing an agent network for international student recruitment.

Short-program development, including summer and winter programs and dual and joint degrees, could be facilitated via linkages between institutions or consortia.

International students and their agents will expect clear and supportive admission policies and procedures from Canadian universities that conform with best practices in Australia .

University (Graduate)

The postgraduate segment holds particular promise for institutions committed to long-term market development.

Effective marketing initiatives could include campus visits, "Canada Days" and engaging in promotional activities at industry fairs. Targeting undergraduate students who have participated in exchange programs in Canada could be part of an effective long-term strategy.

Utilizing agent networks, both within Australia and in the students' home countries, to encourage international students who have studied in Australia to continue their postgraduate studies in Canada could be productive as well.

Establishing dual and joint-degree relationships at the bachelor-to-master's or master's-to-master's levels is another recruitment tool aimed at both domestic and international students.

At the doctoral level, joint research programs between institutions or university consortia which involve collaboration and exchange between staff and students in Australia and Canada could be successful. Offering co-title or dual PhDs, with associated scholarships, could be effective for recruiting both domestic and international research students.

Fruitful partnerships could also be formed between various Australian university consortia and their Canadian counterparts, i.e. the Group of 8 (G08), Australia Technical Universities Network (ATN) and Innovative Research Universities of Australia (IRUA).

Language Institute (ESL)

The market for ESL programs is extremely small, hence there is little likelihood of recruiting significant numbers of students.

Language Institute (FSL)

Very short-term immersion programs aimed at secondary school, vocational or university level students represent a small niche market in Australia. Networking between academic institutions or between Canadian provinces and Australian states could also prove important.

Transnational Delivery of Education and Training

Australia is an exporter of transnational programs, with some 66,000 students enrolled in offshore programs. In light of the availability of public school, vocational or university level places in Australia, this suggests significant market potential for offshore operations in Australia by foreign providers.

Offshore Campuses

A small number of transnational education providers operate in Australia. For example, UK-based Oxford Brookes University has partnered with Latrobe University to provide joint degrees aimed at overseas students living in Sydney. More recently, U.S.-based Carnegie Mellon

University has established a small campus in Adelaide with financial support from the South Australian Government. At a minimum, providers require state government registration; when recruiting international students they are subject to the provisions of the Education Services for Overseas Students (ESOS) Act.

There may be opportunities to offer dual or joint qualifications with Australian TAFE providers or universities, or small niche graduate programs where similar programs do not exist in Australia.

Distance Education

Distance education has long been popular in Australia for domestic and, more recently, international students. Australia's significant domestic capacity in distance education suggests few opportunities for Canadian institutions or school boards in this area.

Opportunities do exist, however, to provide programs that can be integrated into the course offerings of Australian universities specializing in distance education. GradSchool.com is an example of such co-operation.

Education System

Australia's education system is similar to Canada's in that each state and territory government is responsible for the regulation, supply and funding of its own education system. Although the Australian Government exerts no direct responsibility over education, it does provide significant supplementary funding. Most of the funding required by universities is provided by the federal government.

The education system includes both public and private schools; whether public or private, education spans preschool to year twelve. In August 2006, close to 7,000 public schools and 2,700 private schools operated in Australia .

Post-secondary education includes vocational education, workplace training and university programs.

Schooling in Australia

Preschool, Primary and Secondary School

School attendance is compulsory in Australia between the ages of six and fifteen. Preschool, which is not compulsory, and primary school education are administered slightly differently in each state and territory.

Preschools are regulated and funded by different government departments within each state or territory--rarely by the education department.

Students attend primary and secondary school for a total of thirteen years. Primary school includes a preparatory year followed by year one through year six or seven; secondary school includes year seven or eight through year twelve, depending on the state or territory. The differences in structure for each state or territory education system are shown in the following table.

Education Structure by Territory or State				
Territory/state	Preschool	Preparatory	Primary	Secondary
NSW	Preschool	Kindergarten	Years 1-6	Years 7-12
QLD	None	Preparatory	Years 1-7	Years 8-12
SA	Preschool	Reception	Years 1-7	Years 8-12
TAS	Kindergarten	Preparatory	Years 1-6	Years 7-12
VIC	Kindergarten	Preparatory	Years 1-6	Years 7-12
WA	Kindergarten	Pre-primary	Years 1-7	Years 8-12
ACT	Preschool	Kindergarten	Years 1-6	Years 7-12
NT	Preschool	Transition	Years 1-7	Years 8-12

Australia has a national curriculum framework, which requires all schools, both public and private, to provide subjects in the following eight key learning areas: English; Mathematics; Studies of Society and the Environment; Science; Arts; Languages Other Than English; Technology and Personal Development; and Health and Physical Education.

Senior Secondary School

A diverse range of subjects are taught in Australia's secondary schools. In the non-compulsory senior secondary years (years ten through twelve), students can choose courses which lead to either vocational and technical studies or higher education.

At year twelve, students may complete a government-endorsed Senior Secondary Certificate of Education, an admission requirement that is recognized by all Australian universities and vocational educational and training institutions as well as by many universities overseas. In Australia, students usually attend a tertiary institution in their home state.

There are 46 public and private schools in Australia offering the International Baccalaureate (IB), the two-year pre-university curriculum for students between 16 and 19 years of age. The IB is approved by the International Baccalaureate Organisation (IBO).

Post-secondary Education

Post-secondary education is delivered in a similar fashion throughout Australia; it comprises vocational and technical education, and higher education.

Vocational and Technical Education

Vocational and Technical Education (VTE) operates under a standardized national training system which is industry-led, competency-based, and quality-assured. The programs can be undertaken in many ways, i.e. through secondary schools, post-secondary institutions and workplaces. VTE programs can be articulated with those of universities and colleges.

VTE providers must be Registered Training Organizations (RTOs); they may either be private or public, and may either offer a range of courses or industry-specific programs. Providers of public education include the Technical and Further Education Colleges (TAFE) in all states and territories.

Five universities are multi-sector and include a TAFE. As well, 25 Australian technical colleges are being established for secondary students seeking part-time apprenticeships while completing their final years of school.

Programs offered under the National Training Framework (NTF) lead to the following qualifications:

- Certificates I ? IV (short-term courses of up to six months of full-time study);
- Diplomas, advanced diplomas (course duration: 18 to 24 months of full-time study); and,
- Vocational graduate certificates and diplomas (6 to 12 months study).

The National Training Information Service (NTIS) is the official register of information on training packages, qualifications, courses, Units of Competency and Registered Training Organizations (RTOs).

The Australian Qualifications Framework (AQF) defines all nationally recognized qualifications. The Australian Quality Training Framework (AQTF) is a set of nationally recognized standards that ensure the delivery of high-quality VTE services throughout Australia.

Higher Education

Australia's 38 public universities, two private universities and its other accredited institutions constitute a standardized national higher education system. Such institutions are established under state legislation but are financed and effectively controlled by the Australian Government through the Department of Education Science and Training (DEST).

Higher education programs lead to the following qualifications:

- Diplomas (course duration: 18 to 24 months of full-time study);
- Advanced diplomas and associate degrees;
- Bachelor degrees (course duration: typically three years of full-time study, except for some professional degrees, for example Engineering or Education, which require four);
- Honours degrees (typically an additional year, designed for students working towards a PhD);
- Graduate certificates (typically six months) and graduate diplomas (course duration: 12 to 24 months of full-time study);
- Master's degrees (course duration: one to two years of full-time study);
- Doctoral degrees (generally 42 months of full-time study); regarded as a research degree, similar to the UK model; professional doctorates will be a combination of coursework and research; and,
- Degrees in medicine and law (normally taught at an undergraduate level).

Each state and territory has an accreditation authority responsible for higher education.

Universities are self-accrediting; quality assurance is confirmed by audits from the Australian Universities Quality Assurance Agency (AUQA), which makes the results publicly available.

Australian undergraduate students typically pay approximately 30% of the cost of their education via the Higher Education Contribution Scheme (HECS). Students who choose to pay at the start of their studies receive a discount; most choose to pay via the tax system once they enter the workforce. A similar payment scheme is in place for graduate programs.

School/Academic Year

The school year begins in late January or early February and lasts until December. The year comprises four terms in all states and territories except Tasmania, which has opted for three terms. There is a two-week holiday between terms and a summer holiday that lasts approximately six weeks in December and January.

Students attend school from Monday to Friday each week. The length of the school day varies slightly across Australia but it generally begins at 9.00 a.m. and ends at 3.30 p.m.

A university academic year comprises two semesters, except for Bond University which has three; classes begin in late February and end in November. Universities also offer summer sessions.

Language of Instruction

English is the language of instruction in Australia's educational institutions; some schools offer bilingual programs or programs in other languages.

Private or Non-government Education

The private (non-government) education system operates in parallel with government institutions at all levels in Australia. In August 2006, there were 9,612 schools operating in Australia: 6,902 (71.8%) government schools and 2,710 (28.2%) non-government.

Private schools operate in association with the Catholic Church, other Christian denominations, faiths such as Judaism and Islam or practitioners of educational philosophies such as Montessori and Steiner. All private schools are registered with the state or territorial education department and are subject to regular inspection. They generally use the same curricula as government schools and must comply with regulations regarding teacher registration and premises.

Funding derives from fees and from the Australian Government and the individual state and territorial governments.

Distance and External Education

Each state and territory offers distance education to students who, for various reasons, are unable to attend school in person. Families who choose to home school their children are required to register with the education department in their state.

Distance or external education programs are offered through a variety of media, including print and electronic communications. The Alice Springs School of the Air is an example of such an institution.

Distance and external programs are offered in both the vocational and technical education sector and the higher education sector.

Ministerial Council on Education, Employment, Training and Youth Affairs (MCEETYA)

MCEETYA is a council comprising ministers responsible for education, employment, training and youth affairs from the Australian federal, state and territorial governments and New Zealand. The Council's responsibilities include national co-ordination and policy development involving all levels and sectors of education, employment, training and youth affairs.

Accreditation and Accreditation Authorities

At the request of MCEETYA, the Australian Qualifications Framework (AQF) established the AQF Register of Recognized Education Institutions and Authorized Accreditation Authorities in Australia to facilitate the verification of the AQF qualifications. The AQF Register comprises the following registration categories:

- Government accredited authorities (all sectors);
- Universities and other self-accrediting institutions of higher education;
- Non self-accrediting institutions of higher education and their AQF-approved qualifications;
- Registered Training Organizations (RTOs) and their AQF-approved qualifications (VTE

sector); and,

- Overseas higher education institutions that are approved to operate in Australia, their local agents (where relevant) and the international qualifications they are approved to deliver.

For detailed information, refer to the AQF Website. (See the **Reference Material** section of this report.)

Market Environment

Market Entry Considerations

The following information may be useful for Canadian institutions interested in the Australian market.

Activities of the CEC Network

In 2006, representatives from the CEC attended pre-selected high school career nights, a major careers fair and provided support to visiting Canadian universities at high profile private schools. Many students attending such schools continue their university studies overseas. The CEC also participated in the University Exchange Fair Circuit in NSW, Victoria and Queensland, pre-departure seminars in Australia and New Zealand, as well as a co-operative event sponsored by the United States, the United Kingdom and Canada in South Australia. The CEC has also engaged in promotional events known as "All Canada Days" at universities and has distributed brochures to local high schools. Canadian institutions can make use of the CEC by providing information about the programs they offer, the benefits and the career opportunities.

CEC Outreach (2006)	
Activity	Number
High school visits	30
University campus visits	16
University All Canada Days	10
Education fairs and exhibitions	8
Pre-departure visits	6

International Students in Australia

As shown in the following table, the majority of international students reside in two states: New South Wales (NSW) and Victoria. The vocational and training education (VTE) sector includes public and private components. In NSW, in particular Sydney, many private vocational education providers deliver pathway and diploma programs aimed at international students. The substantial English language education community in Sydney supports this activity. This private vocational sector (VTE) represents opportunities for recruitment into Canadian universities and colleges.

International Student Enrolment (2006)									
Institution /type	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	TOTAL
Higher Education	61,716	53,801	24,576	10,676	15,008	2,232	222	4,066	172,297
Vocational	41,977	23,644	8,157	2,217	6,735	299	51	605	83,685
Secondary Schools	7,670	7,216	4,567	2,079	2,053	424	102	606	24,717
English language colleges	31,247	16,527	17,541	3,404	7,201	801	69	678	77,468
Non-award programs	8,871	5,954	6,178	2,204	1,633	181	31	599	25,651
TOTAL	151,481	107,142	61,019	20,580	32,630	3,937	475	6,554	383,818

(Source: AEI)

Skilled Migration Program

Some 60% of all international students in Australia are considering migrating to Australia under

the skilled migration program; similar initiatives have been successful in India and China. In light of this, Canadian institutions are advised to encourage such students to consider migration options that involve studying in Canada. In 2006, there were negative reports in Australia regarding skilled migration and the international student program; more specifically, concerns arose about the English language capabilities of graduates entering the workforce, and the activities of some private education providers.

Two Year Work Rule

The ability of graduates to work for a longer period after graduation in Canada may be a useful tool in recruiting international students from Australia.

Institutional Linkages

Creating linkages between institutions is important for universities, and potentially important for colleges, technical institutes and schools, as a mechanism to drive bilateral exchanges. This applies to domestic and international students alike.

Institutions intent on recruiting students in Australia are advised to establish interdisciplinary linkages with their Australian counterparts in a number of geographic areas. Australian universities might, for example, expect a Canadian university to be established in most, if not all, states as well as in the larger urban centres. Establishing a country-wide presence will facilitate student recruitment.

Peak Bodies, Professional Associations and Consortia

A number of peak bodies such as the Australian Vice Chancellors Committee (AVCC), the Australian Council for Private Education and Training (ACPET) and English Australia (EA) play important roles in international education. Professional associations such as the International Education Association of Australia (IEAA) and the International Student Advisors Network of Australia (ISANA) can identify useful contacts within local institutions. The annual Australian International Education Conference (AIEC), an important networking event, draws about 1,200 Australian and overseas registrants.

Province to State Agreements

Those working within the Australian public systems in all sectors are familiar with province-to-state arrangements, which facilitate large scale marketing efforts on behalf of institutions and remove the need for linkages between individual institutions.

Private Agents

Education agents in Australia can assist in recruiting international students. Indeed, over half of these students enroll in institutions via agents who receive commissions from the institutions. The Australian student visa system supports the "packaging" of offers by multiple institutions. For example, a student may receive an offer that includes an English course at a private English college, a foundation (year twelve) and a university degree. International students and their families in Australia are accustomed to working with agents. The ESOS Act regulates the activities of agents recruiting students to Australia.

Many agents operate out of Australian cities, in particular Sydney and Melbourne; most will also maintain offices in at least one other country. For example, a Chinese agent may have offices in Sydney as well as in Beijing and Shanghai. It may be beneficial to use the services of several agents to cover a wider range of student home countries.

IDP Education Australia is Australia's largest agent with some 65 offices across Asia, the Middle East and Europe. IDP is a "for profit" enterprise, owned in equal share by a consortium of Australian universities and a private investor. At present, IDP Education Australia does not recruit for other countries, but this may change.

Opportunities exist for Canadian institutions in all market segments--particularly among universities and colleges--to build agent networks in Australia. Without the use of agents, sustainable growth in the international student market is unlikely. On the other hand, agents are unlikely to be effective in recruiting domestic students, with the exception of citizens or permanent residents who entered Australia initially on student visas.

Internet Presence

Setting up useful Web sites, searchable via keywords by Google and other search engines, will be important tools to reach the target demographic. Sites that market to students in Australia (domestic and international) specifically and employ techniques aimed at the so-called "Generation Y" will be most successful.

Importance of Bilateral Exchange

Bilateral exchange at the undergraduate level underpins the Canadian-Australian education relationship. A recent study on student mobility by the Australian Universities International Directors Forum (AUIDF) covering 33 of Australia's 38 universities showed that in 2005 close to 7,300 students had undertaken international mobility experiences overseas, including some 3,600 on semester or year-long bilateral exchanges. The study did not report the actual numbers that went to Canada only that close to 1,700 students traveled to the Americas. These data suggest that between 30-40%, or up to 450 students on a conservative estimate, traveled to Canada.

These students constitute an excellent market for recruitment into master's and doctoral programs. Institutions, consortia, provincial or other groups that track and prospect-manage returning exchange students and encourage them to return to Canada will have a competitive advantage.

The AUIDF study revealed that some 62% of students on mobility programs were supported by a combination of university and government scholarship programs.

Full Fee Paying Australian Citizens

Domestic students may enter undergraduate programs as fee paying students, with fees that are similar to Canadian international student fees. In most cases, students will have chosen to pay full fees because admission may have been denied otherwise.

Public perception in Australia suggests that these students are finding it difficult to find places in universities. This is because, despite being well-qualified, many students find it hard to meet the high entry level requirements for courses with restricted domestic quotas, particularly at prestigious universities, and are therefore willing to pay full fees to gain admission.

Increasingly Master's by Coursework programs in Australia are being offered on a full fee basis.

Fee Paying Study Abroad

In Australia as in Canada students traditionally do not study overseas, applying their academic credits to their home degree on a fee-paying basis. The growing numbers of full fee paying international and domestic students, in conjunction with the rising cost of tuition for domestic students who are now required to contribute more to the Higher Education Contribution Scheme (HECS), may cause this situation to change. The study abroad experience in Canada usually requires a student to take a leave of absence from their home university and to pay fees in the Canadian university. The student will then transfer the credits earned in Canada to their home degree in Australia.

This type of program is in the very early stages of development. Nevertheless, institutions prepared to enter the market on a long-term basis may find universities with strong mobility programs willing to support them. This could come in the form of testing the benefits of generic promotion through the Internet, seminars and direct advertising.

Intensive Programs

Short overseas programs of two to ten weeks duration are becoming increasingly popular at the university level, and are also offered by secondary schools. Opportunities will arise for work placement and internships, cultural programs, French language immersion, hospitality and tourism, indigenous studies and other disciplines. Institutional relationships will be a primary way to extend these programs across all sectors.

Dual and Joint Degrees

Dual degree programs between institutions in different countries have been growing more popular for some time, largely the result of efforts by the European Community to encourage student mobility across the European Union through its various funding schemes. These ideas are consistent with and key components of, both strategies for student mobility and for the recruitment of fee-paying students. Some arrangements will be in the form of bilateral exchanges while others will be commercial in nature, i.e. one-way fees. These approaches enable students to earn qualifications and gain immersion experience in a range of countries or regions. In the global economy, this confers a powerful advantage.

Dual degrees may be offered at various academic levels, e.g. diploma or associate degree to bachelor, bachelor to bachelor, bachelor to master's, master's to master's, or PhD to PhD. The individual model will depend on a number of factors, including how each degree is structured and the rules set by each partner institution.

A joint degree is a single degree granted by two institutions following the completion of study terms at both. Unlike dual or double degrees, which are crafted from existing degree structures, a joint degree implies a new degree structure that would be approved at both

institutions and would result in only one testamur (award certificate) issued, generally, but not always, in the name of both institutions.

These arrangements will require an agreement between the institutions and mutual recognition of both sets of academic standards. A number of Australian universities with strong mobility programs consider these a value-added proposition that complements student exchanges or fee-based study abroad. To this end, they have been working with European and Latin American institutions, particularly at the bachelor to master's and master's to master's levels.

Diploma Pathway and Foundation Programs

Diploma pathway programs generally include English for Academic Purposes (if required), a year twelve equivalent and year one of a university program. The programs are operated by private providers or by universities, often through wholly owned corporate arms. A program will typically be designed for a single university, or a consortium of universities, with either a guarantee of entry into second year if the student is successful, or at least a strong presumption of entry. These students are sought after by other universities largely because they have proven themselves ready for university study and have overcome most, if not all, of the language and cultural difficulties.

The largest example in this category is the IBT Group, a publicly traded company that operates on a number of university campuses in Australia, the United Kingdom and Canada (Simon Fraser University in British Columbia). Their Australian operations include the Melbourne Institute of Business and Technology (MIBT) at Deakin University and Sydney Institute of Business and Technology at Macquarie University. A similar example is INSEARCH at the University of Technology in Sydney.

Foundation programs are offered by similar organizations but are a year twelve equivalent only and as such are designed for entry into year one of a bachelor degree.

The participants in these programs are predominantly international students; increasingly, however, they are seen as alternative pathways to university for domestic students who may not have performed well in secondary school.

This category also includes diploma and associate degree programs run by the state Technical and Further Education (TAFE) colleges and some private providers. These programs have set specific vocational outcomes, rather than being designed for university credit transfer. It is a national requirement that universities provide advanced standing of one year for diploma graduates. Many universities give only scant recognition of this by providing credit for electives, which cannot be used in a professional discipline because of course structures.

Free Standing Certificates and Diplomas

Private vocational institutions provide international students with a range of certificate and diploma programs, in particular business, IT, and hospitality and tourism. In general, these are designed for international students and cannot be articulated into degree programs. The programs are popular with students who may not have the time, financial capacity or academic capability for a more formal vocational or professional program, or who are planning on taking advantage of skilled migration initiatives.

Secondary Schools including the International Baccalaureate (IB)

There were 24,717 international students enrolled in the school system in Australia in 2006, including over 7,000 each in NSW and Victoria. Some 46 schools in Australia offer the IB to domestic and international students. IB students are typically very mobile and hence may be seeking opportunities in other countries for university-level programs.

Marketing aimed at these students which complements institutional relationships may be successful.

Research Quality Framework (RQF)

The upcoming implementation of the RQF in 2008 by the Australian Government has encouraged universities to focus on their core research strengths and on ways to expand their research programs. Effective international linkages are one way of accomplishing this, particularly where the partners share similar disciplinary strengths.

Limiting Factors

The following factors could limit the effectiveness of marketing to full fee students in Australia.

The acceptance of graduates of three-year Australian programs into master's programs as a general policy, rather than on an individual basis, is important to institutions that are serious about the recruitment of good students, both domestic and international.

International students who have submitted an application to a university in Australia typically receive an offer within a week, sometimes within 48 hours. Agents operating in Australia will also expect fast responses.

Acceptance of a wide range of English language tests, including IELTS, TOEFL and Cambridge, as well as institutional tests, will be important.

International and domestic students exiting foundation programs offered by Australian universities and meeting the minimum entry requirements for a particular Canadian institution will expect to be accepted.

International and domestic students who have completed pathway programs to Australian universities which, for example, provide one year of advanced standing into a compatible course in an Australian university will expect equivalent advanced standing in Canada.

Government Regulations

There is no regulatory framework that directly affects the recruitment of students from Australia into Canada, either through institutional linkages or agents. Education agents are not required to be registered unless they provide advice on migration.

To establish a transnational program in Australia, providers must adhere to the relevant state registration procedures. If international students are recruited into Australia as part of a Canadian transnational program under the student visa program, the institution is also subject to the ESOS Act and its accompanying National Code.

Competitive Environment

The United States and the United Kingdom are Canada's main competitors for student recruitment in Australia. Both countries bring greater resources to the market than Canada does.

Reference Material

The following Internet sites provide additional information about the international education market in Australia and related matters.

- [Australian Government \(Department of Immigration and Citizenship\)](#)
- ["Agents' Gateway"](#)
- [Australian Bureau of Statistics](#)
- [Department of Foreign Affairs and Trade](#)
- [Australian Education International \(AEI\)](#)
- [Country Education Profiles \(CEP\) online](#)
- [AEI market information](#)
- [Study in Australia \(AEI\)](#)
- [ESOS Act](#)
- [Department of Education Science and Training](#)
- [Research Quality Framework](#)
- [Qualifications Recognition](#)
- [Endeavour Programme \(Australian scholarships\)](#)
- [Australian Council for Private Education and Training \(ACPET\)](#)
- [Australian Qualifications Framework Register](#)
- [Australian Secondary Principals Association Inc.](#)
- [Australian Universities Quality Agency \(AUQA\)](#)
- [Universities Australia](#)

State and Territorial Departments of Education and Associations

- [Australian Capital Territory, Department of Education and Training](#)
- [New South Wales, Department of Education and Training](#)
- [Northern Territory Department of Employment, Education and Training](#)
- [Education Queensland](#)
- [South Australia Department of Education and Children's Services](#)
- [Tasmania Department of Education](#)
- [Victoria Department of Education and Training](#)
- [Western Australia Department of Education and Training](#)
- [English Australia](#)

- [IDP Education Australia](#)
- [International Education Association of Australia](#)
- [Independent Schools Council of Australia](#)
- [International Student Advisors Network of Australia \(ISANA\)](#)
- [TAFE Directors Australia](#)

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¹*The Government of Canada has prepared this report based on primary and secondary sources of information. Readers should take note that the Government of Canada does not guarantee the accuracy of any of the information contained in this report, nor does it necessarily endorse the organizations listed herein. Readers should independently verify the accuracy and reliability of the information.*

²*All monetary amounts are expressed in Canadian dollars, unless otherwise indicated. The conversion rate to Canadian dollars is based on Bank of Canada rates.*

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