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**Education Linkages Between Canada and  
Australia:**

**An Examination of the Potential for Greater  
Student Flows**

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Prepared for  
The Government of Canada

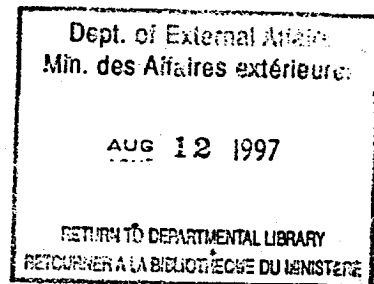
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## EXECUTIVE SUMMARY

### Introduction

This study examines the opportunities for enhanced collaboration between Canada and Australia in the area of international education. Funded by the Canadian Department of Foreign Affairs and International Trade (DFAIT), the project aims to determine whether, in Australia, there is a potential market for Canada as an education destination. In seeking to answer this question the study explores the size and nature of the Australian international education industry; assesses the willingness of Canadian and Australian institutions to collaborate in joint marketing and supply initiatives; and considers the policy implications of this.

The study involved four distinct components. In the first stage a review of the literature was undertaken to assess the size and nature of the Australian and Canadian international education industries. During the second stage a series of in-depth interviews were conducted with a range of education institutions in Australia at all levels. The third stage involved a survey of Canadian colleges and universities to gather comment from that country on the proposals generated during the first stage. In the final stage, a survey of international and domestic students was conducted in institutions throughout Australia. The findings from these four stages were:

### Assessment of the Australian and Canadian industries

Canada and Australia are key suppliers of international education. However, over the past decade Canada's share of international students has declined relative to Australia's. The causes of this decline appear to be related to a lack of coordination in Canada's international marketing effort. Australia also appears to have a competitive advantage in its geographic proximity to many South East Asian markets. Over the longer term Canada is likely to regain some its lost market share from Australia by adopting a more professional and nationally coordinated marketing campaign.

There are over 80,000 international students studying in Australia. Thirty-one percent are enrolled in private colleges and there is a potential pool of some 32,000 international students who have not yet enrolled in an Australian university and may choose to relocate to Canada given sufficient inducement.

Australia also hosts 5.4 million students and sends over 5,000 overseas for full time study, primarily in the United States. Many of these students complete undergraduate degree programs in America and pay fees. Canada may be able to attract a larger proportion of this group than it currently does if suitable marketing strategies were undertaken.

Canada may also attract a sizeable number of Australia post-graduate students. The median course fees for post-graduate programs in Canada are substantially lower than in Australia. With Australia's universities now shifting towards charging full-fees for post-graduate course work Masters and Doctorates, it is possible that Canada might become attractive to the 15,000 Australian students who undertake such programs.

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For Australian institutions, Canada is a potentially attractive market as well. Over 27,000 Canadians study overseas each year, mostly in the United States and Britain. Australian institutions such as the University of Western Sydney have already begun to recruit sizeable numbers of Canadian students. Enhanced marketing of Australian education in Canada is capable of attracting a large proportion of these students to Australia.

### Discussions with Australian institutions

Discussions were held with 31 education institutions and representative agencies in Australia. Despite some hesitation the general response from the Australian industry was positive. Six key initiatives were produced from these discussions:

1. **Joint Promotion and Marketing** - collaborative efforts to jointly market or promote international education to prospective students;
2. **Study Abroad Programs** - enhancement of study abroad programs to provide scope for commercially viable short course exchanges of fee paying international students;
3. **Joint Courses and Programs** - collaboration between Australian and Canadian institutions to run joint courses that would be accredited by both countries;
4. **Offshore Teaching Programs** - joint ventures between institutions in Canada and Australia to establish offshore teaching programs in targeted third countries;
5. **Project Work** - collaboration between Canada and Australia to form consortia to target large scale World Bank or Asian Development Bank projects in education and training;
6. **The CANZIEG Concept** - a three country forum involving Canada, Australia and New Zealand to exchange information, agree on accreditation and visa regulations and build a foundation for future cooperation in the field of international education.

### A survey of Canadian institutions

Following the discussions with the Australian institutions a survey was sent to 169 Canadian universities and colleges. A total of 77 useable responses were returned. Respondents were asked to consider each of the six initiatives suggested in the discussions with the Australian industry and indicate their willingness to participate. The responses are summarised below:

<u>Initiative</u>	<u>supportive</u>	<u>uncertain</u>	<u>un-supportive</u>
• Willing to disseminate information on Australia to own students	90.2%	2.0%	7.8%
• Consider promoting via private Australian providers for a fee	51.0%	33.3%	15.7%
• Willing to undertake joint promotion with Australia	52.9%	29.4%	17.6%

• Have existing exchange agreements with Australia	39.7%	1.4%	58.9%
• Willing to develop joint study abroad programs with Australia	94.4%	1.4%	2.8%
• Willing to establish joint courses & programs with Australia	80.4%	11.8%	5.9%
• Willing to establish joint offshore teaching programs with Australia	76.5%	9.8%	13.7%
• Willing to collaborate over joint project work with Australia	80.4%	15.7%	3.9%
• Willing to support the CANZIEG concept	73.5%	22.4%	4.1%

### A survey of students

In the final stage of this project a series of focus groups and a survey of 879 students was conducted in universities and colleges throughout Australia. Fifty-three per cent of the sample were international students. The results from these discussions and survey suggest that Canada is not well known by the international students who come to Australia. Many view it as a country that is more expensive than Australia and possessed of a much harsher climate.

Just over half the sample indicated that they wished to continue on to further study upon completion of their current program. Seventy per cent of the international students and 61 per cent of the Australian students indicated that they would consider doing so in another country. For the majority, the United States followed by the United Kingdom were their main preferences. Canada ranked third.

The response by the students to the various study initiatives outlined in this study was positive. Study abroad programs and joint courses offered by both Australia and Canada were viewed with strong interest.

### Policy implications

The study suggests that there is a high level of support for enhanced collaboration between Canadian and Australian education institutions in the field of international education. Further, this support is mirrored by the international and domestic students surveyed in Australia.

Canada and Australia have the opportunity to collaborate in developing a framework that can offer a truly global international education experience for students from their own countries and third country nationals. Achieving this will require commitment from individual institutions to participate in such joint initiatives. There will need to be a willingness to suspend the current mood of competition and seek genuine cooperation if this is to be realised. A degree of leadership is likely to be required at a national level by government agencies in both countries.

## PART ONE: BACKGROUND AND METHODOLOGY

### Introduction

International education has emerged as a major export industry for the Canadian economy. Although Canada has been a leading supplier of international education for many decades, its position has been challenged by the emergence during the 1980's of new supplier countries. One of the most rapidly developing suppliers has been Australia, which grew its international student population from 7,525 in 1970, to 69,819 in 1994 (DEET, 1994; DEET, 1995; DEET, 1996). Australia draws most of its students from the Asia-Pacific and therefore competes directly with Canada for the same markets.

The emergence of Australia as a major supplier of international education in Canada's traditional markets has generated an interest in determining whether an opportunity exists for marketing Canadian education in Australia. Despite long standing bilateral exchange programs between Canadian and Australian institutions, the commercial opportunities for fee paying students within the Australian market have not been fully explored.

This study examines the opportunities for enhanced interaction between Canada and Australia in the field of international education. It draws upon the findings of a series of in-depth interviews with academic and administrative staff at universities, colleges and schools throughout Australia and focus groups with their students. Additional input was provided by a survey of Canadian universities and colleges and a separate survey of international and domestic students studying in Australia.

The study was conducted by the Institute for Research into International Competitiveness (IRIC) of the Curtin Business School, Curtin University of Technology, Perth, Western Australia, in association with Curtin Consultancy Services Pty Ltd and BIZTRAC, the commercial arm of the Faculty of Business at Edith Cowan University. It was commissioned by the Canadian Department of Foreign Affairs and International Trade (DFAIT) via the Canadian High Commission in Canberra.

### Objectives

The primary objective of this study was to "determine whether, in Australia, there is a potential market for Canada as an education destination". In achieving this objective the following enabling objectives were considered:

1. Determine the size, nature and potential of key segments within the Australian market. specifically:
  - a) undergraduate international students seeking post-graduate education overseas;
  - b) undergraduate Australian students seeking post-graduate education overseas;

- c) other key segments such as international ELICOS and TAFE students seeking further education.
2. Assess the willingness of Australian education institutions to collaborate with Canadian institutions in joint marketing and supply initiatives.
3. Assess the willingness of Canadian education institutions to collaborate with Australian institutions in joint marketing and supply initiatives.
4. Consideration of the policy implications for the development of joint marketing and supply initiatives.

### The Economic Importance of International Education

The economic importance of international education is well recognised by most countries, although the level of impact differs from one host nation to another. For example, while the United States is host to some two thirds of the world's international students, they comprise a relatively small proportion of its total student population. Table 1.1 shows the relative importance of international students to selected host nations as measured by Unesco statistics in 1993.

**Table 1.1: International student and total enrolments in major exporter nations 1993\***

Host country	Foreign enrolment	Total enrolment	% of total enrolment
United States	449,749	14,473,106	3.1%
France	139,562	2,074,591	6.7%
Germany†	116,474	2,033,702	5.7%
United Kingdom	95,594	1,528,389	6.2%
Australia	42,415	575,617	7.4%
Canada	35,451	874,604	4.0%

\* All figures for higher education only. † Figures for West Germany in 1991.

*Source: (Unesco, 1996)*

What is noticeable about Table 1.1 is the relative importance of international students to each of the six host countries. Although fewer international students study in the United Kingdom than the United States, they comprise a considerably higher proportion of total enrolments in the UK than the US. Australia's universities are host to a substantially larger proportion of international students to domestic ones than either the United States or Canada. Given the rapid increase in overseas student enrolments within Australian universities and other institutions since the early 1990s the relative importance of international education to Australia has grown.

The United States, which attracts the majority of the world's international students, has estimated that its universities and colleges generated a trade surplus of US\$6 billion in 1993 comprising about 10 per cent of the total U.S. services trade surplus (Evans, 1995). In addition to the revenues generated directly from tuition fees, a



further US\$3.6 billion is injected into the United States economy from international student spending on accommodation, food and other items (Scott, 1995).

The value of international education to the United Kingdom has been estimated at £716 million, making it twice as large as coal or gas exports, and more valuable than many of Britain's manufacturing sectors. On average Britain's universities are generating between 2 and 5 per cent of their recurrent income from non-European Union international students (Greenaway and Tuck, 1996).

In Australia international education has emerged as one of the country's most important export industries. The official value of export income in 1995 from overseas students within Australia was A\$1.9 billion. Education exports now account for 9 per cent of Australia's total service exports, compared with less than 3 per cent in 1985. After tourism and transportation it represented the third most important sector of all services exports which have experienced growth rates of 16.6 per cent over the past two decades (LEK, 1994).

Direct estimates of the level of financial dependence of Australia's education institutions upon international student fees are difficult to obtain. Based on DEET statistics the average full fee paying overseas student (FFPOS) studying for a Bachelor's Degree spends A\$11,705 per annum on course fees (DEET, 1996). This would mean that an institution such as the Royal Melbourne Institute of Technology which enrolled 4,431 international students during 1995, is generating some A\$52 million in annual revenues from international education. Monash University which enrolled 4,929 international students during 1995 would be generating around A\$58 million per year. Such revenues make even the largest of Australia's government funded institutions heavily dependent on FFPOS revenues.

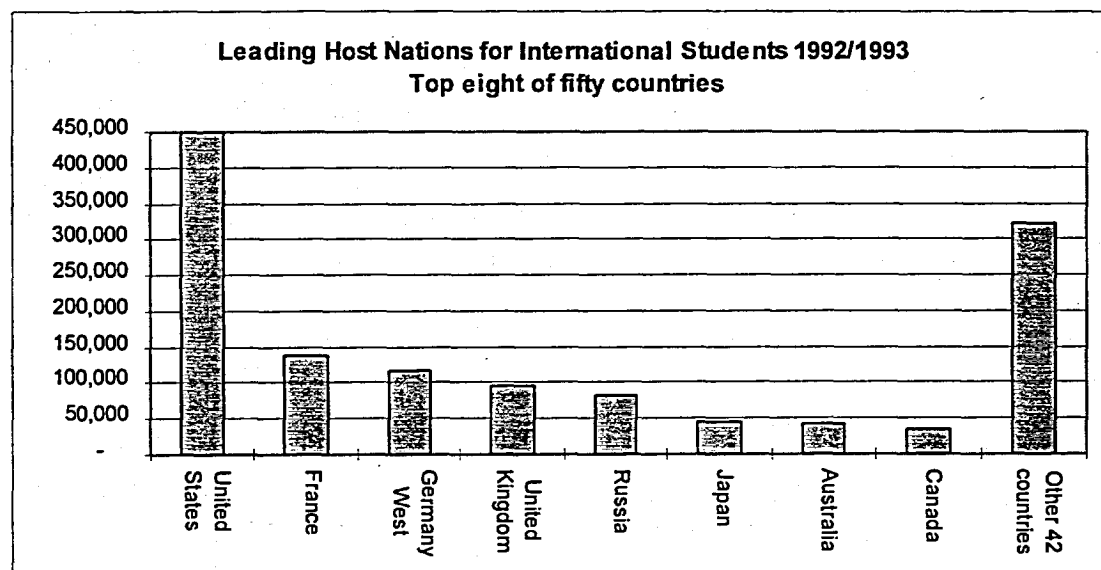
Just how dependent the Australian education sector is upon international education is difficult to assess. Discussions directly with Australian universities, Technical And Further Education (TAFE) Colleges and private post-secondary colleges suggest that any loss of FFPOS revenues would result in revenue shortfalls worth millions of dollars plus the shedding of hundreds of staff (Mazzarol and Soutar, 1996). Australia's competitiveness as a supplier of international education is therefore important not just as a useful source of overseas revenues, but may be critical to the long term financial health of a substantial part of that country's education infrastructure.

Canada has also found international education to be economically beneficial. Commencing in 1970 some Provincial governments introduced differential fees for international and domestic students. This pattern spread throughout the 1980's (Woodhall, 1987). By 1991 Canada was host to around 3 per cent of the world's international students, who contributed some C\$1.5 billion to the Canadian economy and generated an estimated 19,000 jobs (MSS, 1993). The benefit to Canada of international education over the next 30 years - even assuming modest growth rates of 2.2 per cent - could be the creation of over 25,000 jobs (Humphries and Ramezani, 1996).

## Canada and Australia as International Education Suppliers

In 1993 Australia and Canada were ranked respectively seventh and eighth out of the top fifty countries that supply international education, after the United States, France, Germany, the United Kingdom, Russia and Japan (Unesco, 1996). Figure 1.1 shows these eight leading supplier countries who take the majority of international students (56% in 1993).

The dominance of the United States can be seen in Figure 1.1, with the other major suppliers such as France and Germany, attracting significant numbers by comparison with Australia and Canada. It should be noted, however, that despite the overall size of foreign student enrolments to France, Germany, Russia and Japan, these countries are not teaching in English to any large degree. As such they do not attract the same type of student as do the English language suppliers. With most Asian students seeking to study English language programs it is the United States and United Kingdom that pose the major competitive threat to Australian and Canadian international education.



Source: (Unesco, 1996)

**Fig 1.1: Leading Host Nations in International Education**

Since the mid-1980's Canada has experienced a decline in its relative position as a host nation, slipping slightly behind Australia in terms of the number of international students it hosts. During the same period Australia enjoyed a rapid expansion of its international student enrolments, shifting its education sector from a scholarship focused "aid oriented" approach, to a commercial full-fee paying system. Within such South East Asian markets as Singapore, Malaysia and Indonesia, Australian international education has secured a large market share.

## A comparison of Canadian and Australian education systems

Canada and Australia both have somewhat devolved education systems. The Canadian education system is comprised of differing regional systems, with ten provincial and two territory governments each managing its own schools structure (APEC, 1994:6-7). Within Australia there are nine legislative authorities (six states, two territories and one federal) administering eight separate public education systems and a system of private schools and colleges (ABS, 1992 :16).

Canada has some 90 universities or equivalent institutions capable of issuing undergraduate and post-graduate degrees. Around 70 per cent of these institutions grant their own degrees, while the others are theological colleges which do not grant degrees (CICIC, 1996:4). In 1996 the University of Toronto was the largest institution in Canada with just over 50,000 students. Other large universities were the *Universite' de Montreal* with around 50,000 and the University of Ottawa, with over 24,000 students (CICIC, 1996). International students seeking access to Canada's universities must usually complete language and academic entrance tests set by each institution. Quota's also apply to specific high demand programs such as medicine.

In addition to its universities, Canada also maintains a system of Community Colleges along similar lines to that of the United States (APEC, 1994). Such institutions provide vocational programs lasting two to three years and leading to diplomas in professional and technical fields like art, fisheries, paramedical technology and agriculture. The province of Quebec also operates a system of *Colleges d'enseignement general et professionnel* (CEGEPs) which parallel the community colleges. In 1996 there were over 200 community colleges in Canada (CICIC, 1996).

The Canadian Community College system is more vocationally oriented than the United States College system and provides direct employment outcomes. It is largely funded by the Provincial Governments who provide between 45 and 95 per cent of college funding depending on the institution. In recent years the level of government financial support for the Colleges has reduced. The size and scope of Canada's Community Colleges varies. For example, in 1995 *Le College des Grands Lacs*, Ontario had 220 full time students studying at 5 campuses. By contrast, the George Brown College, Toronto, had 20,000 full time students studying in 160 programs and 45,000 part time students in 700 further education programs (Giles, 1996).

Australia's higher education institutions are self-governing, although the majority of Australia's universities are largely funded by Commonwealth grants. Australia has 48 degree granting institutions including 35 public universities, two private universities (Bond University, University of Notre Dame), and the Australian Catholic University (with sites in six states), the Australian Defence Force Academy (which is a campus of the University of NSW) and some institutes and university colleges. The size of Australia's universities range from relatively large institutions located in the capital cities of each state, to smaller regional institutions. One of the largest is Monash University, which in 1993/94 had 36,467 students and 2,333 academic and research staff. By comparison, one of the smaller universities is the Victoria University of Technology (VUT). Established in 1991 it offers both degree programs and vocational courses leading to certificate and diploma qualifications. In 1994 VUT had

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total student enrolments of 16,500 of whom 13,755 were enrolled at university level and 2,745 at TAFE. The university also employed 2,794 staff who were divided into university and TAFE sectors. The university sector had 624 academic and 592 non-academic staff, while the TAFE sector had 89 academic and 52 non-academic staff.

Australia has no Community Colleges, but operates a national vocational education and training system. This is comprised of both public and private providers. Each state and territory government funds a system of Technical and Further Education (TAFE) Colleges. Each TAFE College has its own Chief Executive Officer, who answers to the state or territory Minister for Education or Training.

In 1990 there were 684 TAFE institutions in Australia with enrolments in excess of 1.8 million students (ABS, 1992:23). The majority of TAFE students (65%) were enrolled in vocational courses. Other post-secondary education is conducted on a private basis and is funded by fees (ABS, 1992:17). These institutions include theological colleges, private business and commercial colleges, English language colleges and flying training schools. Mostly privately owned and operated it is difficult to obtain details on these institutions. In 1993 they enrolled an estimated 6,260 students of whom 70 per cent were studying at privately owned centres (DEET, 1994).

### **Recent reforms to the Canadian and Australian education systems**

Over the past ten years a variety of educational reforms and reviews have been undertaken within both Canada and Australia. In Canada many of these reforms have focused on the needs of primary and secondary schools (APEC, 1994:6-7). Australia has undertaken wide sweeping reforms throughout all levels of education, driven either by state or federal government initiatives.

During the 1980's the Australian Federal Government initiated a major reform of the Australian higher education system. This involved the removal of what was called the "binary system" which included Universities, Colleges of Advanced Education (CAEs) and Institutes of Technology. These latter institutions were diploma and degree granting institutions which had emerged during the 1970's. The reforms led to the establishment of a Unified National System (UNS in which all institutions were to be placed on an equal footing, with Federal Government funding and access to research grants through the Australian Research Council. Until this time universities had been obtaining most of the country's research funds (Williams, 1988).

The end result of this reform process was the merger of many CAEs and the establishment of a number of new universities throughout the country. A further reform was the introduction of the Higher Education Contribution Scheme (HECS) to ease the burden on the Australian fiscal system (Hogbin, 1988:54). The effect of these reforms can be gauged by the fact that where there had been 70 higher education institutions in Australia in 1986, by 1991 there were only 35 (ABS, 1992 :22).

In 1993 the Australian higher education system catered for some 964,159 students and employed an estimated 27,780 teaching and research staff (Unesco, 1996). The size of Australia's higher education institutions has also grown significantly. Whereas the

average student enrolments for each institution in 1986 was 5,400, this figure had risen to 15,000 per institution by 1991 (ABS, 1992). In the four most populous states of NSW, Victoria and Queensland, the average number of student enrolments per institution was 28,454 in 1991 (ABS, 1992).

Canada enjoys one of the highest education participation rates in the world (Unesco, 1996). In 1994 Canadian government spending on education totalled C\$56.5 billion, of which 62 per cent was allocated to primary and secondary levels, 20 per cent to higher education and 17 per cent to technical and vocational education (CICIC, 1996). A comparison of Australia and Canada in terms of their national education infrastructure is revealing. Table 1.2 illustrates the differences between Australia and Canada in educational expenditure, student enrolments and pupil-teacher ratios using Unesco estimates from 1992/1993.

**Table 1.2: Comparison of Education Infrastructure in Canada and Australia**

Item	Canada	Australia
<b>Public expenditure on education (1993):</b>		
SUS per capita:	\$1,456	\$ 914
World ranking out of 46 countries:	7th	16th
<b>Secondary school enrolment (1992):</b>		
% of 12-17 year olds enrolled full time:	104%*	82%
World ranking out of 46 countries:	4th	25th
<b>Higher education enrolment (1992):</b>		
% of 20-24 year olds enrolled full time:	99%	40%
World ranking out of 46 countries:	1st	10th
<b>Pupil-Teacher ratio (1st level) (1993):</b>		
Number of pupils per teacher:	17	17
World ranking out of 46 countries:	17th	17th
<b>Pupil-Teacher ratio (2nd level) (1993):</b>		
% of 20-24 year olds enrolled full time:	16	12
World ranking out of 46 countries:	26th	12th
<b>Overall effectiveness of the education system (1996):</b>		
World ranking out of 46 countries:	20th	15th

\*This figure exceeds 100% because some pupils are above the countries standard school age.

source: (*World Economic Forum, 1996*)

From Table 1.2 it can be seen that Canada spends more per capita than Australia on its education system and enjoys higher levels of student participation rates. Despite this the Australian education system was ranked by the *World Competitiveness Report* in 1996 as more likely to meet the needs of a competitive economy than that of Canada.

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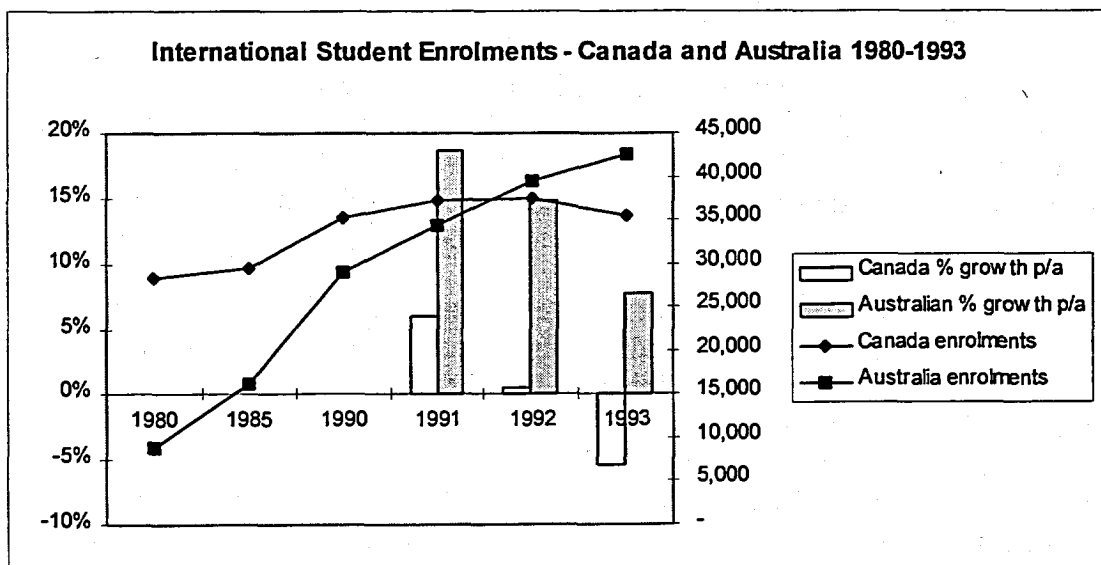
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Further examination of the enrolments and retention rates within the two countries education systems reveals a slightly different picture to that reflected in the initial statistics shown in Table 1.2. According to Windshuttle (1988), the lower retention rates in Australian secondary schools reflect the shift of students out of high schools and into TAFE Colleges and related vocational education and training (VET) programs. Unlike Australia, Canada has no national VET system and therefore retains its students longer in both senior high school and higher education institutions. If adjustments are made to the enrolments to take into consideration these differences, Australia's education retention rates become similar to those of Canada's in the school area, and Australia actually enrolls more tertiary students than Canada as a proportion of its population.

### Enrolment of international students

In 1993 there were 35,451 international students studying in Canada, representing around 3 per cent of the world total (Unesco, 1996). Canada draws the largest proportion of its international students from Asia, particularly Hong Kong. In 1993 Asian students comprised around 48 per cent of total international enrolments, this figure was 43.5 per cent in 1991, with Hong Kong and China comprising 53 per cent of all Asian students (Unesco, 1996).



Source: (Unesco, 1996)

Figure 1.2: International student flows to Canada and Australia 1980-1993

During the mid-1980's Canada's enrolments of international students fell. This may be attributed to the introduction of tuition fees for international students throughout the provinces and the more aggressive marketing being undertaken by countries such as Australia and the United Kingdom. Enrolments climbed during the late 1980's, only to decline again during the early 1990's. Figure 1.2 shows the flow of Canada's international students over the period from 1980 to 1993. It can be seen that growth

rates during the early 1990's were poor, resulting in an overall decline in total international student enrolments.

As illustrated in Figure 1.2 the opening up of the Australian education sector to full-fee paying overseas students (FFPOS) during the mid-1980's led to a dramatic expansion of that country's international education sector. In 1970 there were some 7,525 international students studying in Australia (Unesco, 1992), the majority of whom were either fully or partially sponsored by government aid programs (Industry Commission, 1991:17). By 1986 there were 22,533 international students in Australia of whom 20 per cent were FFPOS (Harris and Jarrett, 1990).

Following a decade of active marketing by Australian education institutions supported by both Federal and State Government agencies, by 1995 there were 80,722 international students enrolled in Australian institutions of whom 93 per cent were FFPOS (DEET, 1996). This very significant growth in overseas student numbers contrasts with the relative decline of international student flows to Canada during the same period.

The commercialisation of international education during the 1980's was also taking place in the United Kingdom. In 1978 there were some 90,000 international students studying in Britain primarily at university level (Williams, 1987). Faced with an estimated cost of £100 million per annum in subsidies for these students the British Government announced an introduction of full-fees from 1979 onwards (Williams, 1987). Following an initial decline in international student enrolments during the mid-1980's (Kinnell, 1989), British institutions commenced a coordinated campaign of overseas recruitment in order to make up revenue shortfalls (Moore, 1989). Where once international students had been treated as a fact of life, suddenly they were the target of well organised marketing campaigns (Woodhall, 1989).

Direct competition from countries such as Australia and the United Kingdom are likely to have influenced the overall decline in international student flows to Canada from many key Asian markets. Table 1.3 lists the main countries of Asia in terms of the actual number of foreign students as well as their 'sending rates'. These 13 countries account for more than one third of the entire foreign student population and for over 80 per cent of the foreign students from Asia. The sending rate is calculated by dividing the number of foreign students by the domestic pool of students in higher education. While China easily accounts for the largest number of foreign students because of its enormous population, its sending rate is quite modest compared with the high sending rates of countries such as Hong Kong, Taiwan and Malaysia.

Table 1.3 also shows the population of foreign students sent to both Canada and Australia. For Canada the most important market is Hong Kong, with Singapore and Taiwan in second and third place. By comparison Australia attracts a much higher proportion of students from Asia, particularly Singapore and Malaysia. Although these figures are from 1993, estimates from Australian visa issuing authorities suggest that Australia may have secured the dominant position in the Indonesian market in 1995/96 ahead of even the United States<sup>1</sup>. The close geographic proximity of

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<sup>1</sup> Based on visa counts by the AIEF in Jakarta compared to visa counts of other supplier nations.

Australia to many of the South East Asian countries, combined with a "value for money" education product, has enabled Australia to rival the United States as the country of first choice for many Asian students.

**Table 1.3: Main Asian Countries Sending Tertiary Students to Australia and Canada 1993**

Country	No. of Foreign Students	Sending Rate*	% sent to Australia	% sent to Canada
China	126,875	5.36	2.1	2.6
Japan	55,145	1.87	1.2	1.4
Korea	49,665	2.60	1.4	0.5
Taiwan†	50,000	22.73	7.8	6.1
India	43,205	0.94	1.1	2.4
Malaysia	34,397	22.10	22.8	4.1
Hong Kong	34,225	27.79	19.8	16.8
Iran	30,639	9.48	1.9	3.4
Turkey	28,911	3.06	0.1	0.4
Indonesia	19,911	1.00	13.6	2.5
Jordan	15,504	14.91	0.0	0.6
Singapore	13,556	12.63	39.6	7.2
Thailand	12,909	1.10	6.7	1.4

\*The sending rate is defined as the number of foreign students as a proportion of total domestic enrolment

† Figures for Taiwan are based on estimates (not included in Unesco data)

Source: (Unesco, 1996).

Canada's relative decline in international student enrolments has been attributed to a lack of national coordination and professionalism in marketing. Recent fee increases in Ontario have been blamed along with the preferential fees charged to European Union students by the United Kingdom (Humphries and Ramezani, 1996). Although Canada has a high quality education product to offer the world, its geography is against it. Australia is closer to Asia, Britain is closer to Europe and Canada is too close to the United States. For these reasons Canada cannot afford to be complacent, nor can it ignore the need for a well managed nationally coordinated marketing effort.

### National marketing efforts

The Canadian education system is viewed as flexible and enables a "fast tracking" of high school education for suitably qualified students. Singaporean students, for example, have been able to complete secondary level programs for entry into Canadian universities within six months of arrival (Smart and Ang, 1992:26). Canada's location within the North American socio-economic "hub" of western

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commerce and industry, its bilingual education system (English and French), high quality education and sophisticated economy should combine to position it as a major provider of international education. Despite this Canada has been unable to attract the same proportion of Asian students as Australia.

Part of the reason for this may lie with the overall level of coordination in marketing of Canadian education in overseas markets. Canada's central government has only limited involvement in education and it is likely that this has impeded the country's ability to coordinate its national effort. Marketing on an international level among Canadian universities has been described as "ad hoc" (DEET, 1993). Until the 1990s overseas promotion at a national level was the responsibility of Academic Relations Officers located within the Canadian diplomatic posts who are assisted by locally engaged staff. During the mid-1990s Canada established a series of Canadian Education Centres (CECs) throughout key Asia-Pacific markets.

This network of CECs is managed by the Asia-Pacific Foundation of Canada (APFC), an independent, non-profit organisation which was established in 1984 under an Act of Parliament (APFC, 1996). In 1996 the APFC had a budget of C\$5.5 million and a staff of 45 and was headquartered in Vancouver, British Columbia. Other examples of coordinated marketing efforts can be found at the Provincial level. The British Columbia Centre for International Education (BCCIE) is one of the more successful cases. Established in 1990 with funding from the Provincial Government, the BCCIE coordinates marketing for the Province's universities, community colleges and other education institutions taking international students. As a result of the efforts of the BCCIE the annual growth in international student enrolments to British Columbia has been 25 per cent since 1987 (BCCIE, 1996).

Education policy in Canada is dominated by provincial rather than federal government authority. There is considerable variation in fee setting policy for international students in Canada due to the provincial government structure (Davis, 1995). In 1995 annual fees ranged from C\$2,500 for undergraduate Arts degree programs, to C\$13,700 for Engineering courses (CICIC, 1996:7). Such variation in fees also appears to be common within the Community College sector (Gale, 1995; Giles, 1996). The impact of this confusion of fee setting policy has been subject to some debate. While some like Humphries and Ramezani (1996) have called for a more consistent fee setting policy, others have dismissed the impact of differences in fee setting on international student recruitment as minimal (MSS, 1993:19).

The marketing of Australian international education has largely been the responsibility of individual institutions, although a variety of Federal and State Government agencies also provide promotion and marketing support. Since 1994 the Australian International Education Foundation (AIEF) has sought to provide strategic coordination of the Australian industry's marketing efforts. The AIEF manages the Australian Education Centres (AECs). These Centres were opened in 1990 in Hong Kong, Kuala Lumpur, Jakarta, Singapore, Seoul, Taipei, Bangkok, Suva, and Manila (DEET, 1993). In 1996 the AIEF established additional AECs in Brunei, Tokyo and New Delhi, and had representatives in the Gulf States, Western Europe and North America.

Other agencies active in the field of international marketing of Australian education are the International Development Program of Australian Universities and Colleges (IDP Ltd.), the Australian Trade Commission (AUSTRADE), and various state and territory based organisations.

Within the university sector the most significant of these has been the IDP Education Australia Ltd. Established in 1969 by the Australian Vice Chancellor's Committee (AVCC) the IDP was originally aimed at supporting higher education institutions in the Asia-Pacific region with aid. During the mid 1980's the IDP began to focus more upon marketing education, and in 1988 was incorporated into a non-profit company owned by the AVCC and the Commonwealth Government (DEET, 1993). The IDP Education Australia Ltd has been highly successful in recruiting international students for Australian higher education. It acts as a recruitment agent and also undertakes the management of Education Trade Fairs in selected overseas markets throughout the year. IDP offices are located in most Asian capitals from where Australia draws its students.

Prior to 1994 the AEC network was managed by the IDP who used them for both promotion and recruitment purposes. Designed as "one stop shops", the AECs were supposed to offer advice and information to prospective students while also arranging promotion and recruitment. Although similar in concept to the British Council or United States Information Agency (USIA) offices, the AECs did not receive sufficient funding to cover their operating costs and charged service fees. This policy of charging prospective students for services was contrary to the practices of USIA or the British Council. It was also viewed by some as projecting a negative image of Australian international education (Carruthers, 1993).

During 1991, for example, the AEC in Singapore was charging students an administrative fee of A\$50 to complete visa applications, while the same service was available free from the Australian High Commission (Smart and Ang, 1992:28). Concern was also expressed over AEC staff being remunerated from commissions for recruitment and the potential conflict of interests this might pose (Marshall and Smart, 1991).

To address such issues the Australian Federal Government announced a continuation of the move for the "internationalisation of education", but with the aim of shifting the industry focus to "a more mature position, away from narrow economic perspective's" (Beasley, 1992). During 1993 the role of the AECs was reviewed (DEET, 1993). By December of that year the Australian International Education Foundation (AIEF) was established (Beasley, 1993).

In addition to the international promotion and marketing efforts of federal agencies the Australian State Governments also undertake independent activities. One of the more active states is Western Australia, which has placed WA Education Officers (WAEOs) in selected international markets since the mid-1980's. In 1993 WAEOs were located in Singapore, Hong Kong and Kuala Lumpur within the Western Australian Government's Trade and Investment Offices in each city (DCT, 1993 :43). More recently an office has been opened in India.

Since 1991 the WAEOs have been under the control of the WA Department of Commerce and Trade (DOCAT), and undertake a marketing function for Western Australian education institutions. Staffed by locals they generate revenue by charging registration and counselling fees and from commissions for student recruitment (DCT, 1993 :44). As they operate in parallel with the AECs, a degree of competition has arisen. Unlike the AECs the WAEOs cannot process visa applications, which tends to favour the AEC (Smart and Ang, 1992:28). The AECs have been criticised by WA education institutions for charging excessive fees and demonstrating a bias towards eastern states institutions (DCT, 1993 :46).

## **A Comparison of Canada's and Australia's competitiveness**

Although the main focus of this report is to identify areas for future cooperation between the two countries, it is worth considering how Australia and Canada compare as rivals. It should be apparent to most observers from this process that the two countries have more to gain from cooperation than direct competition. A report by the Canadian Minister of Supply and Services identified eight sources of competitive advantages for Canada's international education sector (MSS, 1993:19). We shall examine each of these in detail in order to gauge the overall competitiveness of Canada against Australia.

### **1. High quality of the education system:**

While there is no doubt that Canada offers a high quality education system at all levels, the same can be said of Australia. Furthermore, the average international student who makes a study destination choice regarding a particular country, is usually unable to effectively judge the quality of the education services offered and tends to accept the quality of most countries to be equivalent.

### **2. Canada is a world leader in ESL teaching, curriculum and development:**

The quality of Canada's English as a Second Language (ESL) programs are excellent, and Canada's bilingual culture assists this process. In 1993/94 there were 223,362 students enrolled in second-language immersion programs throughout Canada learning either English or French (Statistics Canada, 1996). Canada also enjoys the advantage of teaching English with a North American accent, something valued by many Asian students. Despite these advantages Australia also offers a world class ESL training system. Australia's English Language Intensive Courses for Overseas Students (ELICOS) have been developed specifically for the needs of international students and offer a highly cost effective package. Even without the North American accent, Australia has begun to attract increasing numbers of Asian and European students to its ELICOS programs.

### **3. Canada offers higher education in two main international languages:**

This bilingualism is clearly an area in which Canada is able to differentiate itself from Australia. However, the attractiveness of French as a language of instruction for international students must be considered. Despite the large number of French

speaking nations who supply France with the bulk of its 140,000 international students, the majority of the world's international students wish to learn in English. The truth of this is to be gauged by the number of students who study English in their home countries and sit for the Test of English as a Foreign Language (TOEFL) examinations. In Japan, for example, there are more than 10 million students of all ages studying English (Asia Facts, 1996).

#### **4. The Canadian English Accent is considered a "Preferred" accent:**

As noted above, the American accent is attractive to many Asian students seeking to eventually work in the United States or with American multi-nationals. This view was supported by this study. It is an area that may indeed provide Canada with an edge over Australia in the ESL/ELICOS sector.

#### **5. Canada has first-class health care at affordable rates:**

When compared with the United States, the health care system in Canada is both less expensive and more user friendly for international students. This is less likely to be true when compared with Australia's health system. International students studying in Australia are required to take out health insurance cover, which is supplied by Medibank Private as a special Overseas Student Health Cover (OSHC) product (DEET, 1992). Some international students (those from New Zealand, Ireland, the United Kingdom, Italy, Malta, Sweden and the Netherlands) are exempt and able to access the national Medicare health scheme. According to a comparison of costs, health insurance for international students in Canada is around US\$400-US\$579 per year, while in Australia it is approximately US\$169-US\$220 per year (IDP Ltd, 1994; Powell, 1994).

#### **6. Canada is affordable - tuition, travel and living costs are cheaper than most key competitors**

An examination of the cost of tuition fees, travel and living costs between Canada and Australia was undertaken in 1994 by IDP Ltd for the Australian Department of Employment, Education, Training and Youth Affairs (Davis, 1995). Table 1.4 shows the comparison of costs for a students studying in either Australia or Canada during 1994.

Such comparisons of cost are difficult due to variations from institution to institution, and some increases in fees which have occurred since 1994<sup>2</sup>. Nevertheless the comparison suggests that Australian and Canadian costs are closely aligned. Canadian course fees appear to be cheaper than those charged by Australian institutions. As a compensation Australia appears to offer some reduction in living costs for many South East Asians due to its closer geographic proximity which reduces travelling time and therefore airfares. Canada is currently a strong competitor with Australia on cost, although this many not be fully appreciated by many Asian students.

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<sup>2</sup> In 1996 Australian visa fees were increased to around \$280 to incorporate a levy for the AIEF while course fees in Ontario rose by 20% in 1995/96.

**Table 1.4: Australian & Canadian Comparative Total Costs of programs 1994\***

	Fees	Visa	Living costs	Medical	Total
<b>Australia</b>					
Arts:	\$7,546-13,499	\$130	\$8,999-\$14,000	\$220	\$19,709-\$24,710
Sci/Eng:	\$12,500-\$19,499				\$21,719-\$33,719
Medicine:	\$20,000-\$26,000				\$29,193-\$40,220
<b>Canada</b>					
Arts:	\$4,507-\$7,764	\$ 85	\$10,190-\$17,601	\$579	\$15,276-\$25,994
Sci/Eng:	\$4,507-\$7,764				\$15,276-\$25,994
Medicine:	\$7,514-\$12,525				\$18,283-\$30,705

\* All values shown in US dollars.

Source: (IDP Ltd, 1994)

### 7. Canada is considered to be a stable, safe, clean and fun living environment:

Both Canada and Australia can lay claim to these attributes. Canada is viewed by many international students as a relatively benign environment with much lower crime rates than is typical of the United States (LTG, 1996). Australia too is viewed in a similar way and can also lay claim to a low crime environment (Harris and Rhall, 1993; ELICOS, 1995; Smart and Ang, 1995).

### 8. Canada is multi-cultural:

Canada has over 850,000 Canadians of Asian origin living there and is one of the most multi-cultural nations in the world. Australia too is a multi-cultural society that is attracting substantial numbers of Asian migrants due to its close proximity to the Asia-Pacific region.

On balance the two countries are able to claim equal levels of attractiveness to international students. Many of the students who come to Canada and Australia from countries in the Asia-Pacific region are relatively young (under 25 years old) and are living overseas for the first time. They have usually made their decision to study in Canada or Australia as a result of a combination of reasons, although there are three factors which may give Australia a competitive edge over other countries which supply international education services including Canada:

#### 1. Geographic Proximity:

The geographic proximity between Australia and the home countries from which many students originate is a key factor in attracting them to that country. For students from Indonesia, Singapore or Malaysia, the distance to Australia is substantially less than other study destinations, such as Canada, the United Kingdom or United States. The impact of geographic proximity on student study destination choice has been identified in past research (Davis, 1995; ELICOS, 1995). Why this is of importance

can be better understood when it is noted that many students travel home or are visited by parents, relatives and friends an average of four times a year during their study programs (DCT, 1993). With so many young students studying abroad the closer the geographic proximity to family the more likely the parents will be satisfied. Closer distances also substantially reduce the cost of airfares and telephone calls.

## **2. Climate:**

A second key factor in Australia's favour is its climate. Compared to Europe or North America, Australia has a milder, warmer climate. This has less impact upon students from North Asia (eg. Korea or Japan), where cold weather is a common occurrence in winter. However, for many South East Asian students, a cold climate is a negative factor. Australia's image as a warm and sunny country is therefore attractive (ELICOS, 1995).

## **3. Government regulation:**

Finally, Australia is generally viewed as having an international education system that is well regulated and therefore able to deliver a consistent standard. Following the collapse of several small privately owned colleges in the early 1990s Australia has taken legislative action to protect international students from financial loss. The Education Services for Overseas Students (Registration of Providers and Financial Regulation) (ESOS) Act, 1991 provides regulation of private institutions (DEET, 1992). Further uniformity is provided by the Commonwealth Department of Education, Employment, Training and Youth Affairs (DEETYA) which is a national agency for controlling all international education providers.

Institutions that wish to recruit international students must register with the Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS). While these matters may not be well understood by international students themselves, they are well recognised among education counsellors and agents in Asian countries. Australia's largely government funded university sector is considered to offer a more consistent standard than the United States higher education sector which boasts some of the best and worst universities in the world. The existence of the TAFE and national VET system is another potentially attractive feature of Australia's international education sector.

## **The longer term outlook for Canada and Australia**

Despite Australia's recent success and Canada's relative decline in the field of international education, the likelihood of this status quo continuing over the long term is problematic. Since the 1950s the overall flow of international students throughout the world has slowed (Kemp, 1990). Whereas the annual rate of growth for such students doubled each decade during the years 1950 to 1970, during the period from 1970 to 1980 the annual rate of growth declined to 6.9 per cent and slowed again to 0.3 per cent in the 1980s (Kemp, 1995). This slowing has been observed in international student flows to the United States (Agarwal and Winkler, 1985; Davis, 1995).

Table 1.5 illustrates the average annual growth rates for the top five host countries over the period 1970 to 1990. It is noticeable that while Canada has experienced a relatively low growth rate over the entire period, Australia's high recent growth rates have gone strongly against the global trend.

**Table 1.5: International Student Growth Rates - Major Host Countries**

Host Country	average annual growth 1970-1980	average annual growth 1980-1990
United States	8.4%	1.3%
France	12.6%	2.1%
Germany	8.3%	5.6%
United Kingdom	8.6%	3.6%
Canada	3.8%	2.5%
Australia	2.3%	12.7%

*Source: (Kemp, 1995:3)*

It is difficult to predict the long term pattern of international student flows. Countries such as China and India may provide a substantial increase in demand over the next twenty years given their economic development and unmet demand for higher education (Blight, 1995). However, it seems unrealistic to imagine that Australia can continue to enjoy the high annual growth rates that it has over the past ten to fifteen years.

The expansion of education systems in many Asian countries, such as Malaysia and Taiwan, may reduce the overall demand for international education in the longer term. An enhanced marketing effort by countries such as the United States and Canada might also reduce the flow of students to Australia. Finally, there are likely to be limits on the capacity for Australia to absorb ever increasing numbers of international students (Mazzarol and Soutar, 1996).

As noted above, Australia has relatively few universities, colleges and other institutions. The expansion of the Australian higher education system during the 1980s coincided with the country's entry into the active recruitment of international full fee paying overseas students. These two events successfully ensured that the absorption of a large population of international students caused minimum strain on the Australian higher education system.

The election of a Federal Coalition Government in Australia in 1996 appears to have ushered in a new era of financial restraints on funding for education. Any future growth in the Australian higher education sector seems unlikely over at least the medium term.

For Canada the decline in its market share over the past decade and a half is likely to have been due to the emergence of Australia as an aggressive new supplier within the Asia-Pacific region. Canada's recent shift to a more coordinated marketing strategy

via the APFC and its network of CECs is likely to pay dividends over time. It will be critical for Canadian Provincial Governments to recognise the importance of working together and reducing any impediments to presenting a united national effort within international markets.

Both Canada and Australia should view themselves as countries with similar international profiles that attract students from many of the same markets. As competitors they will secure some market share from each other with Australia having a stronger competitive edge within South-East Asia, and Canada likely (with adequate marketing effort) to hold its own among North-East Asian countries. A realistic assessment of the world flow of international students shows that it is the United States and possibly Britain who attract the largest number of international students. It is these two countries, particularly the United States who represent the main competition for Australia and Canada.

### Size and nature of the Australian Education Market

Canadian education institutions seeking to develop closer ties with their Australian counterparts are likely to be motivated by the prospect of recruiting students from that country. Estimates of the size of the potential markets in Australia and Canada are difficult to make with accuracy due to the lack of available statistics. In this section we attempt to examine the likely size and nature of the market for overseas students in Australia.

Of the 80,722 international students studying in Australia in 1995, 71 per cent were enrolled at the higher education level. The remainder were spread evenly between the other major sectors within the education system. In addition to these students there were 5.4 million Australian students enrolled in various programs ranging from schools to universities. Table 1.6 shows the distribution of these students throughout the Australian education system.

**Table 1.6: Australian student enrolments by sector 1995**

Education Sector	International Students	Domestic enrolments
Higher education	57,052	604,200
Vocational education & training	5,677	1,661,200
ELICOS programs	8,231	-
Primary & Secondary schools	9,762	3,109,300
Total	80,722	5,374,700

*Source: (ABS, 1996; DEET, 1996)*

For Canadian institutions seeking to recruit students from Australia, the third country international students represent the most promising opportunity. Such students have already committed themselves to a full-fee program and might be interested in undertaking further studies in Canada upon graduation. Later in this report we will examine the likelihood that international students will choose to continue their post-graduate studies in Canada. A survey of students currently enrolled in Australia

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institutions was undertaken and the results are outlined. No reliable estimates on the number of students who choose to continue on to post-graduate studies following graduate are currently available.

In Table 1.7 the international student enrolments within Australian institutions are shown by type of program rather than sector. This provides a slightly different picture of the size and nature of the Australian international education market. An examination of Table 1.7 reveals that around 31 per cent of the international students are enrolled in privately owned institutions at various levels from primary schools to post-secondary colleges. A further 6 per cent are enrolled within the TAFE Colleges at various levels. These students may offer an opportunity for Canadian institutions seeking to attract students.

For students enrolled in TAFE Colleges or Private post secondary colleges there is no guarantee that they will be accepted into Australian university programs upon completion of their diploma programs. While many do succeed in their applications there is no reason why they would not consider applying for entry into a university in a third country such as Canada.

This may also apply to the students enrolled in vocational certificate and advanced certificate programs, university foundation studies programs the ELICOS programs and the schools sector. This creates a pool of around 32,000 international students enrolled in Australia who are pre-university and may be interested in continuing their education in another country.

It should also be noted that Australia has a relatively low proportion of post-graduate students enrolled in its international education sector. For example, compared to the United States, the 15 per cent of international students who are undertaking Masters, Doctorates and other post-graduate programs is low. In the United States these type of students frequently comprise the largest proportion of enrolments (Davis, 1995).

For a young student on their first overseas experience Australia offers an attractive opportunity and parents can maintain easier contact with their children, while retaining greater confidence about their safety. These factors have contributed significantly to the growth in enrolments of international students in Australia's primary and secondary schools. Following graduation this situation changes. After spending three to five years in Australia, students who desire post-graduate or further education qualifications are in a position to seek study destinations elsewhere. Canadian universities may be able to attract a proportion of these students.

Of the 5.4 million Australian students it is likely that Canadian institutions may attract a small proportion to complete their studies in Canada on a full-fee paying basis. It is difficult to estimate the size of this potential market with any accuracy. In 1993 there were 5,128 Australians studying overseas, the largest proportion of whom (44%) were enrolled in United States institutions (Unesco, 1996).

**Table 1.7: International Student Enrolments in Australia by sector - 1995**

Type of program	Number of Students	% of total
<i>University degree programs:</i>		
Doctorate & higher degrees	2,853	3.5%
Masters & other post-graduate degrees	9,128	11.3%
Bachelor's degree programs	34,231	42.4%
<i>Total degree programs</i>	<i>46,212</i>	<i>57.2%</i>
<i>Diploma &amp; Advanced diploma programs:</i>		
TAFE College diploma programs	3,231	4.0%
Private College diploma programs	7,301	9.0%
<i>Total Diploma programs</i>	<i>10,532</i>	<i>13.1%</i>
<i>Certificate &amp; Advanced Certificates:</i>		
University vocational programs	405	0.5%
TAFE College vocational programs	1,004	1.2%
Private College vocational programs	2,605	3.2%
<i>Total vocational certificate programs</i>	<i>4,014</i>	<i>5.0%</i>
<i>University Foundation Studies:</i>		
University enrolments	847	1.0%
TAFE College enrolments	147	0.2%
Private College enrolments	669	0.8%
<i>Total University Foundation enrolments</i>	<i>1,663</i>	<i>2.1%</i>
<i>School Enrolments:</i>		
Government secondary schools	1,239	1.5%
Private secondary schools	7,985	10.0%
Government primary schools	144	0.2%
Private primary schools	394	0.5%
<i>Total School enrolments</i>	<i>9,762</i>	<i>12.1%</i>
<i>ELICOS Enrolments:</i>		
University ELICOS programs	1,327	1.6%
TAFE ELICOS programs	773	1.0%
Private ELICOS College programs	6,131	7.6%
<i>Total ELICOS enrolments</i>	<i>8,231</i>	<i>10.2%</i>
	<b>80,722</b>	<b>100%</b>

Many of the 1.7 million Australian students enrolled in the technical and vocational sector are paying full fees to complete programs in private colleges. There is also likely to be an increasing number of Australian students who will pay full fees to complete their undergraduate and post-graduate level programs at university level. The recent higher education budget statement of August 1996 delivered by the Australian Minister for Employment, Education, Training and Youth Affairs made specific provision for local students to "purchase a place at an Australian university" (Vanstone, 1996:3). This statement also increased undergraduate Higher Education Charges (HECs) with fees ranging from A\$3,300 per annum for Arts and Humanities degrees, to A\$5,500 per annum for Medicine and Veterinary Science.

At the post-graduate level the opportunity for Canadian institutions may be even greater. New policy changes introduced by the Australian Federal Government mean that most post-graduate degrees by course work (eg. MBAs, DBAs and Post-Graduate Diplomas) will be charged to the Australian student at full cost. Many universities in Australia have already introduced such fees for Australian students. In 1993, for example, there were 14,723 fee paying post-graduate domestic students enrolled in Australian universities of whom 53 per cent were taking Masters degrees by Course work (Wu and Waller, 1995). From 1997/98 it is anticipated that all such programs will charge full-fees. How this will impact on Canadian institutions ability to recruit Australians to study overseas is difficult to assess. A comparison of Australian and Canadian post-graduate education course fees was undertaken by IDP Ltd in 1994 the results of which are shown in Table 1.8 (Davis, 1995).

**Table 1.8: Australian & Canadian Post-Graduate Annual Course Median Fees 1994**

	Australia	Canada
MBA Program	US \$10,360	US \$5,546
Arts Masters Degree	US \$ 7,844	US \$5,546
Engineering PhD	US \$11,100	US \$5,540

*Source: (Davis, 1995)*

Although these annual fees vary, the findings from this report suggest that Canadian universities charge much lower fees. Annual course fees for Canadian MBA programs, for example, ranged from US\$1,968 to US\$9,015 when measured over 22 selected institutions. By comparison, Australian university fees for their MBA programs ranged from US \$7,474 to US \$15,540 per annum (Davis, 1995).

With Australian and Canadian costs of living being comparable, the rising cost of post-graduate course fees in Australia could serve to make Canada an attractive option for many Australians. In 1993 there were 2,249 Australian students enrolled in institutions in the United States (Unesco, 1996). Forty-two per cent of these students were completing post-graduate programs, 51 per cent undergraduate programs and the remaining students various other courses leading to diplomas (Davis, 1995:47). By comparison only 225 Australian students were enrolled in Canadian institutions during the same year (Unesco, 1996). With the annual median course fees for an MBA program at an American public university is US\$8,214 and for a private one

US\$17,520 it would be cheaper for Australian students to study in Canada rather than the United States (Davis, 1995).

### Opportunities for Australia in the Canadian Market

Australian education institutions are also likely to be seeking an opportunity to benefit from any exchange with their Canadian colleagues by a reciprocal flow of students. In this section the potential of the Canadian market for Australian education institutions is examined.

Canada's education system is larger than Australia's and Canada's students have demonstrated a greater willingness to study overseas. There were 574,314 full time and 300,290 part time students enrolled in Canada's universities in 1993/94. A further 376,840 full-time and 181,040 part-time students were enrolled in the Community College system during the same period (Statistics Canada, 1996).

In 1993 there were 27,437 Canadian students studying abroad at the post-secondary level (Unesco, 1996). Eighty-three per cent of these students were studying in the United States. This placed Canada as the sixth most important source of international students for the United States (Davis, 1995:20). Thirty-six per cent of Canada's students who studied in the United States during 1994/95 did so at the post-graduate level. Fifty-eight per cent were undergraduates and a further 6 per cent were enrolled in diploma courses (Davis, 1995:47).

**Table 1.9: Canadian student enrolments in the USA by field of study - 1993/94**

Field of Study	% undergraduate	% post-graduates
Agriculture	2.1%	1.5%
Business	12.7%	7.6%
Education	18.0%	7.9%
Engineering	6.2%	6.2%
Fine Arts & Applied Arts	6.6%	9.0%
Health Sciences & Professions	12.8%	25.1%
Humanities	3.0%	8.8%
Maths & Computer Science	1.5%	2.5%
Physics & Life Sciences	5.1%	9.4%
Social Science/Humanities	12.0%	13.6%
Intensive English	0.2%	0.2%
Other/undeclared	19.8%	8.1%
	100.0%	100.0%

*Source: (Davis, 1996)*

For undergraduate Canadian students studying in the United States the most popular courses appear to be Education, Business, Health and Social Sciences. At the post-graduate level it is the Health Sciences and Professions (eg. Medicine, Nursing, Physiotherapy, Chiropractic, Dentistry etc) which attract the largest proportion of students. Table 1.9 shows the distribution of Canadian students in undergraduate and post-graduate programs in the United States during 1993/94. It provides a useful

insight into the potential course or subject areas which may be attractive to Canadian students seeking to study abroad.

After the United States the most popular destination for Canadian students is the United Kingdom (1,287 students in 1992), followed closely by France (1,091 students in 1993) (Unesco, 1996). As a study destination Australia ranked in eighth place behind such countries as Germany, China, Italy and Switzerland. During 1995 Australia was host to 543 students from Canada. The majority of these students (89%) were studying at the Higher Education level where 95 per cent were enrolled in the public universities (DEET, 1996). Table 1.10 shows the number of Canadian students enrolled in the ten Australian universities which had the largest international student populations in 1995.

**Table 1.10: Canadian student enrolments in Australia top 10 institutions - 1995**

Institution	number of students	proportion of total
Royal Melbourne Institute of Technology	6	1.1%
Monash University	31	5.7%
University of New South Wales	31	5.7%
Curtin University of Technology	6	1.1%
University of Melbourne	24	4.4%
Victoria University of Technology	3	0.5%
University of Sydney	12	2.2%
University of Western Sydney	177	32.6%
University of Wollongong	4	0.7%
Queensland University of Technology	3	0.5%
Total Canadian students in Australia	543	100.0%

*Source: (DEET, 1996:77)*

An examination of Table 1.10 highlights the high proportion of Canadian students enrolled at the University of Western Sydney (UWS). The reason for this relatively high level of enrolment at UWS can be partially explained by the presence at the university of a Canadian Studies Centre. However, the key explanation which was given during our consultations with UWS staff, was the seizure by the university of a market opportunity. Several years previously a Canadian based education agent had approached Australian institutions seeking to place students wishing to undertake post-graduate courses in education. The UWS was not the first Australian university to accept these students, but it was virtually the only one who gave serious consideration to developing a niche market in Canada.

It is unlikely that Australia can replace the United States as Canada's most popular overseas study destination. The geographic proximity of America is by itself sufficient to ensure this. However, Australia is capable of enhancing its share of Canada's international student population. For example, in 1988 Australia was host

to 10 international students from Canada. As noted earlier this number has grown to over 500 during 1995 (DEET, 1996). The experience of institutions such as the University of Western Sydney suggest that Australia can attract substantial numbers of Canadian students if careful marketing is undertaken. Over time Australia could become the most popular overseas study destination for Canadians after the United States rivalling the United Kingdom which regularly attracts over one thousand students from Canada each year.

### Study Methodology

This project was undertaken in three distinct stages. During the first stage a series of discussions and interviews were conducted with a range of institutions in Western Australia, Victoria, New South Wales, Queensland and the ACT. The purpose of these discussions with institutional administrators and students was to gain a cross sectional view of the Australian international education industry's interest in collaboration with Canadian institutions. The following institutions were involved in this stage of the project:

#### Universities:

- The University of Western Australia (UWA), Perth WA.
- Murdoch University, Perth WA.
- Monash University, Melbourne Vic.
- University of Western Sydney, (UWS) Macarthur, NSW.
- University of Western Sydney, (UWS) Nepean, NSW.
- Australian National University, Canberra ACT
- Curtin University of Technology, Perth WA
- Edith Cowan University, Perth WA
- Royal Melbourne Institute of Technology (RMIT), Melbourne Vic
- University of NSW (UNSW), Sydney NSW
- Queensland University of Technology, Brisbane Q.
- University of Queensland, Brisbane Q.

#### TAFE/VET Sector:

- TAFE International Western Australia
- Hales College, Melbourne Vic
- Victoria College, Melbourne Vic
- New South Wales Department of TAFE, Sydney NSW
- Queensland TAFE International, Brisbane Q.
- South East Metropolitan College of TAFE, Perth WA
- Chalmers Business College, Melbourne Vic
- NSW Department of School Education, Sydney NSW
- Australian Council of Private Education Providers (ACPET)
- Queensland Commercial College, Brisbane Q.

ELICOS Sector:

- Sydney College of English, Sydney NSW
- Australian College of English, Sydney NSW
- Queensland College of English, Brisbane Q.

Schools Sector

- ACT Department of Education & Training, Canberra ACT
- Queensland Department of Education, Brisbane Q.
- Communications and Marketing Dept of School Education, Sydney NSW

Additional discussions were also held with:

Other agencies:

- Australian International Education Foundation (AIEF), Canberra ACT.
- IDP Education Australia Ltd, Canberra ACT
- International Marketing Group, WA Education Consortium, Perth.

In addition to discussions with staff and administrators from these organisations, a series of focus groups were also undertaken with students enrolled in several of these institutions in Perth, Melbourne and Sydney. This provided a foundation for subsequent use in a large scale survey of students.

During the second stage of the project a questionnaire was sent via the Canadian High Commission to all Universities and Community Colleges in Canada, requesting institutional administrators to consider several issues arising from the stage one discussions. A total of 77 responses were returned from Canadian institutions.

In stage three a survey of international and domestic students in Australia was undertaken within Universities and Colleges in several states. A total of 879 useable questionnaires were returned. These examined student knowledge of Canada prior to selecting Australia, and future study intentions. The results of this survey are outlined later in this report.

## PART TWO: THE AUSTRALIAN PERSPECTIVE

### General

In general the response from the Australian industry can be described as positive. The institutions and other agencies with whom we spoke saw a range of potential opportunities for enhanced cooperation and collaboration with Canada in the field of international education. There were some reservations, mostly from the within the university sector, that viewed Canada as a competitive threat to their own market share. However, not all Australian universities appear to feel this way. The discussions were held with senior academic or administrative staff in each of the thirty-two organisations with whom we consulted. Within the TAFE sector and among private colleges a higher level of interest was shown in developing alliances with institutions in Canada if these were to have positive commercial spin offs.

The discussions with the Australian institutions synthesised into six areas in which future cooperation between the two countries could be envisaged:

1. **Joint Promotion and Marketing** - collaborative efforts to jointly market or promote international education to prospective students;
2. **Study Abroad Programs** - enhancement of study abroad programs to provide scope for commercially viable short course exchanges of fee paying international students;
3. **Joint Courses and Programs** - collaboration between Australian and Canadian institutions to run joint courses that would be accredited by both countries;
4. **Offshore Teaching Programs** - joint ventures between institutions in Canada and Australia to establish offshore teaching programs in targeted third countries;
5. **Project Work** - collaboration between Canada and Australia to form consortia to target large scale World Bank or Asian Development Bank projects in education and training;
6. **The CANZIEG Concept** - a three country forum involving Canada, Australia and New Zealand to exchange information, agree on accreditation and visa regulations and build a foundation for future cooperation in the field of international education.

In the following sections each of these six areas will be examined in detail to provide an overview of the nature of the Australian institutional response.

### Joint Promotion and Marketing

Opportunities for Australian and Canadian institutions to engage in joint promotion and marketing activities were examined in the discussions conducted with institutional administrators in Australia. In seeking areas for future collaboration between education institutions in Canada and Australia they may find initial



collaboration in exchanges of information on study opportunities than can be distributed to students in their respective institutions. Most of the institutions with whom we spoke were willing to consider this option. Many of the larger universities were already carrying information about study abroad opportunities including those in Canada within their International Offices.

### *Universities:*

The idea that Australian and Canadian universities might collaborate in joint promotion and marketing activities was generally received with caution and scepticism. Most Australian universities were willing to consider maintaining information on Canadian institutions in their international offices and disseminating it to interested students. This was viewed as a desirable activity in the interests of student welfare. If this service could be reciprocated by Canadian institutions the likelihood of it being accepted among the Australian universities was even higher. It was pointed out by most of the universities with whom we spoke that they already carried some information on study abroad opportunities which included Canada.

At the University of Western Sydney (UWS) Macarthur, there was already an agreement through which UWS carried information on four Canadian universities in Halifax and two in Ontario. UWS had the first Canadian Studies Centre in Australia and encouraged more two way flow of students between the two countries. The University of Queensland also had agreements with the University of British Columbia, University of Edmonton, University of Saskatchewan, University of Alberta and the University of Waterloo. These involved exchange of students and staff and meant that information on these Canadian universities was kept within the international office.

Caution was raised by a number of Australian universities towards the idea of actively promoting Canada as an education destination or even joint marketing and promotion efforts by Australian and Canadian institutions offshore. It was generally felt that this would be of little benefit to Australian universities who already had a solid market share in many South East Asian countries. If the agreement was for a relatively low key approach with Australian institutions providing information to interested students there would be few difficulties. Anything more than this would not likely receive much support from the universities.

### *Non-university sector:*

Within the non-university sector the level of interest was noticeably higher over the prospect of joint promotion and marketing between Australia and Canada. The private business colleges and ELICOS centres expressed interest in undertaking more "pro-active" marketing and promotion with Canadian institutions. For these institutions the opportunity act as an outlet for information on Canadian education was seen as a means of gaining a higher profile within their own markets. If Canadian institutions were willing to offer reciprocal arrangements within North America, Europe or South America this would enhance the overall coverage of the Australian colleges.

Canada does not possess a Canadian Education Centre (CEC) in Australia, therefore the opportunity offered by dissemination of promotional material via Australian institutions appears to be a positive one. Within the ELICOS sector, it is likely that as many as 30 per cent of students who undertake English language instruction in Australia would go on to further study. In 1995 official estimates suggest that there were 8,231 ELICOS students enrolled in Australian institutions (DEET, 1996). Most of those within the ELICOS industry with whom we spoke considered that this is a conservative estimate as many students arrive on tourist visas and undertake short programs. This may also be true of the ESL students who study in Canada. According to a survey of 410 ESL students enrolled in institutions in British Columbia, Ontario, Quebec and Saskatchewan, only 32 per cent were planning to continue on to further education in Canada. Forty-five per cent were studying to learn English for work related reasons, 13 per cent for pleasure and 10 per cent for a combination of reasons (LTG, 1996). It should be noted that this study was undertaken during the January-February period when many ESL students seeking to enter the colleges or universities may not be enrolled.

As noted earlier, the vocational education and training (VET) sector in Australia attracted an estimated 16,209 full-fee paying overseas students (FFPOS) in 1995. Approximately 65 per cent of these students were enrolled in private business colleges with TAFE taking 25 per cent and the remainder in Commonwealth funded higher education institutions. Many of these students seek to upgrade their qualifications by entering universities. Promotion by Canadian institutions to these students via Australian VET sector institutions would be expected to attract a proportion of FFPOS to Canadian rather than Australian universities and colleges.

#### *The schools sector:*

Discussions with the schools sector was limited to contact with government regulatory agencies in Queensland, New South Wales and the Australian Capital Territory. The response from the NSW Department of School Education was quite negative. They expressed scepticism over cooperation with Canada on a commercial basis and felt that Canada was likely to make use of Australian strategies for its own benefit.

The ACT Schools Authority was more relaxed. They could see some merit in holding information on Canadian education for prospective students if the same service was performed for them in Canada. Of interest was the opportunity to have Canada accredit students from the ACT Schools system for entry into Canadian further education.

The Queensland Education Department was unwilling to actively promote Canadian education but expressed a willingness to carry information on Canada for students and parents. There was already some exchange of information taking place between schools systems. Queensland and British Columbia were viewed as having sufficient common ground to make future collaboration possible on a State/Province basis.

## Study Abroad Programs

Most Australian universities have exchange agreements with overseas universities involving student exchange. These programs are not viewed as a commercial activity but do enhance the learning experiences of the students, and the overall reputation of the institution. In developing greater links with Canada, many of the universities with whom we spoke expressed an interest in enhancing the flow of study abroad students. These students offered a greater commercial potential and it was felt that many international students, as well as domestic students would take up the opportunities.

A major dilemma facing Australian universities is the relatively low numbers of Australian students who choose to take up study abroad or student exchange opportunities. It was noted that while tens of thousands of international students were coming into Australia to complete their education, the flow of Australians moving in the other direction was small. A common complaint among the universities with whom we spoke was the general unwillingness of Australian students to study overseas. Many of the universities offered students financial support to pay for airfares and accommodation but were still unable to fill their quotas.

Despite these problems, it was the view of a number of universities that opportunities for enhancing the study abroad programs could be found. The University of Western Sydney, Macarthur proposed a six month study abroad program involving credit transfer and recognition between selected faculties. Numerous opportunities were felt to exist in such fields as: comparative studies in literature, education, management, sociology and anthropology. Students studying agricultural science, forestry and fisheries, or environmental science would gain from study abroad in Canada and Australia where both countries have common expertise.

The Royal Melbourne Institute of Technology (RMIT) was enthusiastic about enhancing its study abroad programs with Canada. It identified such areas as nursing, post-graduate teacher education, chiropractic studies and Chinese medicine as offering potential for development.

Such study abroad programs, while not generating the same level of financial return as full programs, would be expected to enhance the overall profile of Canadian education in Australia and vice versa. Furthermore, once a student has experienced the opportunities offered by the other country first hand, they are more likely to seriously consider choosing that country as a study destination, and enhance promotion via word of mouth referral.

Not all the universities were enthusiastic. While not negative towards the idea of enhancing the level of student exchange and study abroad programs with Canada, these institutions expressed doubt as to financial viability of such activities. Queensland University of Technology (QUT), for example, explained that it already had several agreements with Canadian universities and was actively engaged in study abroad and exchange programs around the world. Arrangements were already in place to send students from Australia to Singapore for short courses. These were expensive and it was likely to be unrealistic to expect many Australian students to be able to afford them.

## Joint Courses and Programs

A further development of the study abroad concept was the management of joint courses and teaching programs between institutions in Canada and Australia. Curtin University of Technology, for example, was looking for opportunities to stage joint courses with institutions in other countries. It already had a program in China in the field of international business that required students to spend time in both countries. RMIT was operating a similar arrangement with universities in Southern China. Australian students paid full-fees to study in China for a Diploma of International Business. The program attracted 24 students in 1996. "RMIT felt that this model might be repeated with a suitably interested Canadian institution in the right academic discipline.

### *University attitudes toward joint programs:*

Monash University suggested that such programs would be highly "labour intensive" but viewed them positively. It noted that the University of Melbourne had an arrangement with Georgetown University in the United States. Monash proposed a program involving use of video conferencing and E-Mail exchanges by academics and students in the two countries. This would culminate in a short study abroad component where the students could visit their sister institution in the other country. Monash University was doubtful that such a program would make much money for either institution. However, they considered the benefits in terms of internationalisation, research and overall institutional reputation would be worth the investment.

UWS Macarthur was interested in developing links with Canadian Universities in the provision of placements for students taking MBA programs. The MBA programs offered by UWS, as with many other Australian universities, placed a focus on international experience. MBA students at UWS would be sent to Canada for a part of their program to work with Canadian firms on special projects. They might complete additional courses in Canada. In return UWS would take Canadian MBA students and find placements for them in Australia. UWS felt that this would be of benefit to both countries. In 1996 UWS had 150 students enrolled within its MBA program. Of these 100 were FFPOS.

This view was echoed by QUT which already had an optional third semester built into its MBA program and encouraged students to study overseas. It was also positive about the idea of facilitating these exchanges via collaboration with Canadian universities. A note of caution was raised. It was pointed out that to make such joint course or programs work it would be essential to involve academic staff and get the heads of Faculty to become enthusiastic about them. Without this involvement no agreement signed by an international office would have much value. To get academic staff interested was likely to require the seed funding of staff exchanges and therefore some initial investment by the institutions.

***TAFE interest in joint programs:***

Within the TAFE sector relatively strong interest was expressed in developing joint programs with Canadian Community Colleges. TAFE International WA, for example, were already seeking to establish international programs with Polytechnics in Scotland. This would involve students having the opportunity to study in both countries and obtain the benefits of the international experience and exposure to different environments where their subject or field was being applied.

There would be benefits from the point of view of flows between the two countries, as well as the enhanced research and academic exchanges. Accreditation issues would need to be addressed. In a two year program the student might spend one year in each country. Such a program would need to consider the mutual benefits offered by both countries. Some possible areas might be: Business and commerce, Hospitality, Art and graphic design, or Manufacturing.

Similar views were expressed by TAFE NSW. Although more cautious as to the net benefits to themselves, TAFE NSW were positive towards the idea of forming joint teaching and training activities with Canadian Community Colleges. TAFE NSW believed that it had a high degree of expertise in the provision of industry linked adult education programs. Suggestions were made about working in conjunction with industry associations in Canada and Australia to deliver vocational training on two continents. Manufacturing related training was identified as one area of possible interest. Enhancement of international trade particularly in the Small and Medium Enterprise sector was also discussed.

TAFE International Queensland were keen to enhance the level of international student exchanges. They currently had no study abroad program but felt the opportunities might exist for exchanges or collaboration in the fields of Hospitality or Travel and Tourism. They were already examining the European and North American market in search of partners for this. For example, the Moreton Institute of TAFE in Brisbane had links to fashion design institutions in Milan, Manchester and New York for its fashion design courses.

***Private VET sector views on joint courses:***

In the private VET sector the Business Colleges with whom we spoke were equally as enthusiastic about joint programs. Hales College, for example, proposed that an opportunity might exist for cooperation in the area of its two year Diploma in Travel and Tourism. This course was popular with international students and was fully accredited with DEETYA. Hales suggested that international students in Australia could spend 5-10 weeks in Canada with an equivalent institution to gain enhanced international experience. The College had 360 international students enrolled in 1996 and believed that if it could establish an agreement with Canadian institutions along these lines it would attract a substantial number of additional international students via its agent network in Asia. Canadian colleges presumably would enjoy equivalent benefits. Another opportunity was also thought to exist in Hotel and Restaurant Management.

Chalmers Business College, which had enrolments of 350 international students in 1996, ran a popular course leading to a Diploma in International Trade. This program was fully accredited by DEETYA and took two years to complete. Chalmers estimated that at least 20% of its international students could afford to continue their education immediately in a third country such as Canada. At present around 10% of its students went on to further study in Australian universities. Chalmers had only recently entered the international education sector, although it had been operating for more than twenty years. The College Director said that he would be willing to act simply as an access point for Canadian institutions seeking to recruit international students. If Canadian institutions could reach agreements with his College over credit transfer and joint programs he was confident that he could fill any loss of international students who might choose to go on to study in Canada. Chalmers College had Diploma programs in Marketing, International Trade and Accounting which might be adapted to enable Canadian institutions to accept its graduates. Chalmers would guarantee quality of service delivery and suggested regular visits by Canadian institution administrators to monitor progress.

Victoria College was another example of the private VET sector. In 1996 Victoria had just over 400 international enrolments. It offered a range of Certificate and Diploma level courses in Business, Computer studies and Travel & Tourism. Deakin University, Monash U and Victoria University of Technology all offered credit transfer arrangements for Victoria College graduates seeking to continue their studies at the university level. The College was also involved with a joint program in Public Relations offered by the University of Central Queensland (UCQ). This involved students doing their first year at Victoria College and then going on to UCQ to complete the full degree program. UCQ was negotiating with other private colleges in Melbourne to offer this course.

Victoria College suggested that this joint program with UCQ might be a model for Canadian institutions seeking to enter the Australian market. Victoria College also operated a joint program in Hotel Management with private institutions in Switzerland. International students enrolled in Australia and completed part of the course at Victoria and the remainder in Switzerland. The program was popular with international students and was promoted by Victoria via its agent network in Asia. It was suggested that Canadian colleges or universities might look for similar opportunities perhaps in computer science or multi-media.

Queensland Commercial College (QCC) held similar views. This institution was part of a private college group that operated in five states. The group had had a campus in Canada in the early 1990s and provided Travel and Tourism as well as Hospitality programs to both Australian and international students. The field of Travel and Tourism was thought to be a particularly suitable one for the development of joint training programs spanning two hemispheres and continents. Students who took such courses needed to be exposed to as many different overseas experiences as possible. They also needed to learn how different countries handled such work.

The views of Chalmers, Hales, Victoria and QCC are likely to be typical of many other private colleges within the Australian VET sector. These institutions are relatively small but highly entrepreneurial. They are represented at an industry level

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by the Australian Council of Private Education Providers (ACPET) which has 160 members and the Australian Council of Independent Business Colleges (ACIBC) with about 17 members. Such institutions are more likely to agree to acting as a representative of Canadian institutions seeking to establish a base in Australia. Most are well run and possess good facilities.

#### ***ELICOS Sector views on joint programs:***

The ELICOS sector in Australia, in particular the private sector, is likely to be interested in developing links to Canadian institutions in the field of study tour and foundation programs. An example of what might be achieved was the current arrangement between the Sydney College of English (SCE) and Swiss Hotel Management institutions. SCE offered a course "English for Hotel Management" that had already attracted 15 students since commencing in May 1996. SCE sent its graduates on to Switzerland to complete their course.

Another area of potential cooperation between Canada and Australia within the ELICOS sector was the language study-tour course. Currently a relatively large number of students from Europe and Asia visited Australia for short courses involving English language instruction and study tours. In this way the student enhanced their English skills and experienced something of another country at the same time. Japan and Korea were prominent Asian markets for Australia in this regard.

Collaboration between Australian and Canadian institutions might see students visiting two countries in a package. This would enable them to learn English with Australian and Canadian accents and experience the culture and country side for the two study destinations. Such programs are usually highly price competitive and would need to take into consideration the large geographic distances and climatic changes involved.

#### **Offshore teaching programs**

Interest was shown at a variety of levels over the idea of Canada and Australia joining forces to establish teaching programs in third countries. Many Australian universities and several TAFE and Private Colleges have offshore teaching programs conducted in partnership with a local education provider. Curtin University of Technology, for example, has offshore programs in Singapore, Malaysia and Hong Kong. Monash University also has programs in Singapore, Hong Kong, Malaysia and Indonesia. In recent years these programs have enjoyed substantial growth and provide these institutions with a potential competitive advantage due to their ability to raise the institution's profile.

Within the university sector the idea of collaborating with Canadian institutions in operating joint offshore programs was received in a largely positive manner. Large markets such as Southern China and India were viewed as offering the most potential. South Korea, Taiwan, Viet Nam and Thailand were also mooted as possible opportunities.

Interest was also shown among the private colleges in establishing offshore teaching programs. Victoria College, for example, was already engaged in running a program in Laos in conjunction with Monash University. This offshore program had 700 students. It was in negotiation with two universities in Thailand to provide ELICOS training in Bangkok. Victoria College felt that an opportunity existed for Canada to work with Australia in offering offshore programs in Viet Nam. The authorities in Viet Nam were somewhat negative towards the United States due to lingering feelings over the war.

Staff at the Queensland Commercial College had been involved in establishing an offshore teaching program in Shanghai in conjunction with the University of Technology Sydney (UTS). A total of 232 Chinese students were recruited into the program and upon completion of their courses all had wanted to go to UTS for further study. Unfortunately Australian visa regulations made it difficult for most to gain access to Australia. It was felt that some collaboration with Canadian institutions might have solved the problem. Agreements for joint programs were already in existence with a number of education institutions in Scotland.

The Australian College of English (ACE) had already established training programs in Thailand for English as a Foreign Language (EFL) teachers. This program was being undertaken in collaboration with the University of Western Sydney (UWS). ACE was also involved in a similar program in Mongolia funded under an AusAid project. The college believed an opportunity also existed in Viet Nam for similar programs.

### **Project work**

Project work refers to consultancies undertaken by institutions, frequently in third countries, for government or industry clients. Most of Australia's universities and TAFE Colleges actively seek such work, and a large proportion of Australia's private colleges will participate in them on an ad hoc basis.

Some examples of this type of work were put forward during our discussions as models offering potential for cooperation with Canadian institutions. TAFE International WA explained how they had recently secured an 18 month project to train staff throughout South East Asia for the Sheraton Hotel Chain. Staff in 35 Hotels in Hong Kong, Taiwan, Thailand, Indonesia, Viet Nam and China required training at a variety of levels from management to counter staff. TAFE instruction teams were drawn from across Australia and sent overseas to run short courses within the Hotels.

TAFE International Queensland also noted that Canada had a strong profile in Indonesia in the area of aid provision. It was their view that more benefit might be gained from collaboration with Canada than with Australian institutions located in other states. The concept of Australia and Canada was thought to be a good package to sell overseas when tendering for international projects.

All the universities with whom we spoke expressed interest in collaborating with Canadian institutions in tendering for projects. It was noted that Canada had enjoyed a greater level of success in winning large projects funded by the World Bank. By

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comparison Australia had not. However, Australian institutions had developed a range of specialised programs relevant to Asia and felt confident in delivering these into the region. It was felt that an alliance between Canada and Australia might be a highly competitive combination.

### **The CANZIEG concept**

An interesting concept initially mooted by Monash University and discussed further with other interlocutors, was the idea of forming a tripartite grouping of English instruction Commonwealth countries within the Asia-Pacific region. Canada, Australia and New Zealand are all likely to find common agreement over educational issues and have cultural and academic roots that should provide a high degree of common ground.

This Canada, Australia, New Zealand International Education Group (CANZIEG) concept could provide a forum for exchange of information on international student flows, accreditation, quality control measures and marketing. It would not be impractical for the three countries to undertake some joint promotion activities in third countries (eg. via Trade Fairs or advertising).

The CANZIEG forum would ensure that student clients received an increased level of service via improvements in quality assurance and access to information on course options. Such a forum would see an increase in the level of goodwill between the three countries and serve as a foundation for future cooperation.

It was suggested that the CANZIEG hold an annual conference that would serve as a meeting place to stimulate further cooperation within the grouping. Issues such as credit transfer, fee setting and immigration/visa problem might be discussed there. The group would enable each country to exchange information on student flows and some "market intelligence". It would provide a framework through which many of the more specific initiatives outlined earlier in this report could be discussed at a national level.

### **Discussions with the AIEF and IDP Ltd**

In addition to the consultations with individual institutions we also spoke to the General Manager of the Australian International Education Foundation (AIEF) Mr John Rowling, and the Chief Executive of IDP Education Australia Ltd, Dr. Dennis Blight. As outlined in Part One, these two organisations provide strategic level marketing and promotion for Australia's international education sector. Their views are important to any national cooperation between Canada and Australia.

#### ***The AIEF Perspective:***

The AIEF was generally cool towards the idea of collaboration between Australia and Canada. Tasked with enhancing the overall marketing of Australian international education overseas, the AIEF views Canada as a competitor country and was reluctant to undertake initiatives which might result in a loss of Australian market share.

In the area of joint promotion and marketing with Canada there was little enthusiasm from the AIEF. However, support was expressed for enhanced institutional links involving greater academic exchanges and research, as well as study abroad programs. The problem of Australian students not going overseas was discussed, and it was agreed that more could be done to encourage this. The Higher Education Contribution Scheme (HECS) needed to be modified to take into consideration opportunities for international study. Sweden had built into its public funding of higher education a component that allowed students to spend time overseas at recognised institutions. This was a model that Australia might consider.

A major concern for the AIEF was the lack of reliable information on international student flows and related data. Little was known about the flow of students around the world in the non-university sectors. School aged students, English language and vocational training students were not recorded by Unesco. Any AIEF collaboration with Canada was likely to be attractive if exchanges on student statistics could be made. The AIEF was already in consultation with the British Council about exchanges of information and this could be extended to Canada. A need was also identified for collaboration over the benchmarking of service quality standards.

#### *The IDP Perspective:*

- In contrast to the AIEF the response from the IDP Ltd was robust. IDP's Chief Executive expressed a desire to assist Canada in organising its international marketing efforts. The general picture of Canada that the IDP held was of a country getting organised and more capable in its approach to the international education market. IDP was even willing to underwrite the establishment of a Canadian IDP Ltd if this was desired.

In the area of project work, IDP had a strong track record. They perceived that many Asian governments desired multi-country consortia to undertake large scale projects in their countries. Canadian-Australian collaboration in this area was viewed as beneficial. According to the IDP Ltd, the Asia-Pacific Foundation of Canada (APFC) had offered to be shareholders with IDP Ltd, Cambridge University and the British Council in the ILTS language training measurement system. This was a major potential rival to the American TOEFL testing system. There were numerous problems with TOEFL, but before ILTS could be accepted widely it would require the collaboration of a number of key supplier countries to recognise it as a preferred measure. IDP Ltd saw this as an opportunity for the APFC to earn revenues as it would be able to own the ILTS program in Canada, supply test materials and administration centres.

In the area of joint promotion and marketing, IDP Ltd was enthusiastic about Australia and Canada sharing joint facilities in certain markets. Just as Canada and Australia currently share joint diplomatic facilities in some overseas posts, IDP saw an opportunity for there to be CECs and AECs jointly established in such markets as Japan or Mexico. Costs could be shared and administration support pooled.

The idea of forming a CANZIEG forum was also viewed in a positive light by IDP Ltd. Reference was made to the existing Commonwealth of Learning organisation,

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which was established in 1988 in Vancouver. Although its focus is upon distance education, it is tasked to ensure that education is available to students in all commonwealth countries. According to IDP Ltd, if CANZIEG was established it should include the Commonwealth of Learning and consider including such countries as Singapore and Malaysia.

## PART THREE: THE CANADIAN PERSPECTIVE

### General

Following the discussions with the Australian institutions and agencies outlined in Part Two, a survey was undertaken of universities and colleges in Canada. This survey was designed to elicit additional comment and feedback from the Canadian institutions regarding the various issues raised in the earlier discussions with the Australian industry representatives.

A total of 169 Universities and Community Colleges in Canada were sent a questionnaire via the Canadian High Commission in Canberra. The final useable responses were 77, giving a response rate of 46 per cent. Thirty-five universities and 42 colleges were included in the final sample, with respondents from all provinces and from the full range of Canadian higher education institutions.

The 77 institutions which comprised the final sample ranged in size from some of the smallest to among the largest. Institutions included in the sample had as few as 250 full time students at Royal Roads University of Victoria, British Columbia, with only three international students, to as many as 50,000 full time students at the University of Toronto.

In general the response from the Canadian higher education sector to the initiatives discussed in Part Two were positive. Many of the Canadian institutions had existing agreements or relationships with their Australian counterparts. There was a strong positive expression for the relationship between the two countries to be enhanced.

### Joint Promotion and Marketing

The Canadian institutions were asked to indicate whether they would be willing to consider disseminating information on Australian educational opportunities to Canadian and third country international students if this service was reciprocated by Australian institutions via their international offices. The majority of respondents (90.2%) indicated that they would be willing to do this.

Some concern was expressed over the costs involved in undertaking this activity. The issue of commercial conflicts of interest were also raised by some institutions. As stated by the Royal Roads University:

*"The issue of inter-institutional/international competition is one issue that would need to be addressed. The Australian counterpart should be selected so that our programs compliment and don't duplicate".*

It was the view of Ryerson Polytechnic University in Toronto that Canadian and Australian universities should identify their respective geographic areas of interest where they might represent each other in their marketing activities. For example, Australian institutions could target the South Pacific while Canada targeted the

Caribbean and Latin America. Common areas such as China, South East Asia or Africa could be approached jointly.

The Eastern College of Applied Arts and Technology in Newfoundland suggested that in addition to institutional level exchanges, the Association of Canadian Community Colleges (ACCC) should be involved in representing the Canadian Community Colleges in any joint marketing and promotion with Australia.

Some concern was also expressed over the need to ensure that any exchange of promotional material between Canadian and Australian institutions did not result in a distortion of the facts. According to Georgia College of Ontario, any reciprocal exchange of promotional material with Australian institutions should provide for complete and accurate passage of information to prospective students. It should also make provision for adequate follow up if these students wished to make applications for entry to the overseas institution. As Seneca College in Ontario commented with respect to the idea of collaboration over the dissemination of information to international students: "The key is reciprocity".

#### *Use of private Australian colleges as recruitment agents:*

The Canadian institutions were also asked to indicate whether they were willing to consider promoting via Australian educational institutions (eg. Private Colleges) to attract third county international students studying in Australia. It was noted that this may require the payment of a success fee to the Australian institutions participating in the scheme. This idea emerged from discussions with some of the smaller Australian private colleges who felt that if they were to send students on to Canada they might receive some form of financial incentive for their efforts.

Fifty-one per cent of the sample indicated that they would be prepared to do this. Thirty-three per cent were unsure of this and appeared to be reluctant to make a commitment to what could be a costly activity. Many of the Canadian institutions do not charge full-fees for international students. The level of their "differential" fees varies from province to province. For those who charge relatively modest fees, the margin left over for commissions or success fees can be small. This view was expressed by the University College of Cape Breton, Nova Scotia, who explained that as their differential fees were "quite modest", "little is available for such payments".

Unlike most Australian institutions, many Canadian universities and colleges are less experienced with using offshore recruitment agents. This view was reinforced by Carleton University who despite having 1,300 international students enrolled in 1996 had never used agents who charged a fee for recruitment.

Other institutions were more willing to make use of agents. The Algonquin College of Applied Arts and Technology indicated that it would normally pay a success fee of around 10 per cent of the non-refundable portion of the student fees for the first year of a post-secondary program. For the ESL programs it would be 10 per cent of the fee paid at the commencement of the study period. Seneca College also indicated that 10 per cent of tuition fees was a common benchmark for agent commissions.

Ryerson Polytechnic University indicated that it would want to draw up individual contractual agreements with each participating Australian feeder institution. The Cabot College of Applied Arts and Technology said that it would expect the fees to be equivalent to those typically found in Asia. It would also expect a degree of fee disclosure. Interestingly Mohawk College in Hamilton Ontario stated that it was already using Australian colleges to recruit international students for it. St Claire College of Applied Arts and Technology in Ontario expressed the view that:

*"We all need the business and should consider such fees a reasonable cost".*

***Collaboration in staging trade fairs or other promotions:***

The Canadian institutions were also asked whether they would be willing to consider working in conjunction with Australian educational institutions in staging trade fairs or other promotion and marketing activities in selected third country markets. Just over half the sample (53%) indicated that they would be willing to this. A further 18 per cent were not willing and 29 per cent were unsure.

According to Bishop's University in Lennoxville, Quebec, any agreement on their part to engage in joint trade fairs or promotions would depend on the cost involved. They noted that their budgets were "tight". It was their preference to encourage campus visits by representatives from Canadian and Australian institutions who might hold information sessions for students interested in studying overseas. As they pointed out:

*"We find that personal contact greatly facilitates collaboration between institutions, and allows opportunities to exchange valuable information on programmes offered."*

Some concerns were expressed over the extent to which Canadian institutions should engage in joint marketing and promotion with Australia. Just as Australian institutions indicated a reluctance to hand over market share to a competitor like Canada, so to did several Canadian institutions. Royal Roads University suggested that it might be better to work more with other Canadian institutions in this area until Canada's "product" had been "clearly differentiated". The Algonquin College of Applied Arts and Technology felt that caution would need to be taken as Australia and Canada were competitors. Others such as the Cabot College of Applied Arts and Technology in Newfoundland, were more sanguine. They felt that the decision to stage joint overseas promotions would be possible in certain circumstances following adequate dialogue. Australia's success at marketing its international programs was recognised as something from which Canada might learn. As stated by the Assiniboine Community College in Manitoba:

*"Australia appears to be so far ahead of Canada in this area. Canada can't seem to get its own act together, let alone collaborate with anyone else. If we can do it though, I'm for it!"*

Other institutions, such as the Saskatchewan Institute of Applied Science and Technology (SIAST), Seneca and St Clair Colleges were less comfortable with the idea of joint promotions with Australia. While noting the idea was "fine in principle"

the SIAST was not sure whether the staging of joint trade fairs "would prove effective". St Clair College echoed these views noting that they would rather work separately with "all-Canadian promotional campaigns". Finally Seneca College commented:

*"Depends entirely of the 'selected markets' and the expense share (assuming promotion & marketing activities are at Seneca standard)."*

The Eastern College of Applied Arts and Technology suggested that while it was willing to participate in joint trade fairs or other promotions with Australia, more use should be made of the Internet with a common World Wide Web site for "Canadian and Australian Post-Secondary Education and Training". This could have links to all participating institutions in both countries.

According to Georgian College of Applied Arts and Technology the value of trade fairs was likely to be limited. They were useful "profile sessions" but were expensive and frequently did not produce "direct results". It was their suggestion that separate agreements be reached between institutions in the two countries that would allow international students to attend college in Canada and Australia, graduate with two diplomas from the two countries.

### **Study Abroad Programs**

The Canadian institutions were asked whether they had current exchange agreements with Australian institutions. Forty per cent of the responding Canadian institutions indicated that they had such agreements. Not surprisingly the majority of these institutions were universities. Sixty-six per cent of the universities said that they had agreements with Australian institutions, while only 20 per cent of the Community Colleges did so.

The University of Alberta, for example, had existing exchange agreements with Edith Cowan University, the Royal Melbourne Institute of Technology (RMIT), Swinburne University of Technology, the University of Queensland and the University of Wollongong. These agreements generally allowed for up to five years of study. They encompassed faculty/staff exchange, joint research and publication, participation in seminars and academic meetings, the exchange of academic materials and short-term study programs.

Another example of the existing exchange agreements between Canada and Australia was the University of Guelph, Ontario. This institution had agreements with the Edith Cowan University, Curtin University of Technology, the University of Adelaide and the University of Canberra. The majority of its exchange agreements specified an upper limit of 10 students per year each way. It was noted that the flow of Canadians to Australia was much stronger than the flow of Australians the other way. Guelph had been forced to restrict its own students applications so as to enable the Australian institutions the chance to catch up. This reluctance by Australian students to travel abroad for study has been noted in Part Two of this report.

McGill University in Montreal noted that Australia was a popular destination for Canadian exchange students. They found that the number of McGill students who wished to participate in academic exchange programs "always exceeds the places available". McGill University was scheduled to send 21 students to Australia in 1996/97 where they would be hosted by the University of Adelaide, University of New South Wales and University of Melbourne.

The University of Western Ontario responded that it had a highly productive link with the Victoria University of Technology (VUT) in Melbourne. Commenced in 1988 this program involved exchanges of staff, graduate and undergraduate students between the Faculty of Kinesiology at Western Ontario and the Faculty of Human Movement at VUT. The program had been expanded in 1996 to include exchanges in the Education Faculties with teacher preparation and Masters level study. During the eight years the program had been running 40 Canadians and 34 Australians had been exchanged. Western Ontario had also established a link with the University of New South Wales in the area of Business Administration. Six Australian and four Canadian students had been exchanged during the past two years.

The Canadian institutions were also asked whether they were willing to work with their Australian counterparts to offer students from Canada and third countries the opportunity to spend periods of time in Australia on study abroad programs. It was noted also that a reciprocal flow of students from Australia would also be achieved. This idea was endorsed by 94 per cent the responding Canadian institutions with equal support from both colleges and universities.

McMaster University in Hamilton, Ontario observed that although it had only a single exchange agreement with the University of Newcastle, a strong interest was being shown by Canadian students in Australia:

*"Over the past few years, a number of McMaster students have arranged their own study abroad at Australian universities for one semester or a full academic year. Judging by the number of enquires received by our International Student Adviser, there is great interest among McMaster students in pursuing some of their studies in Australia."*

McMaster University also noted that there were 13 Australians enrolled there during 1995-96. Of these three were on student visas (2 graduates, 1 intern/resident), and 10 were "landed immigrants".

Fanshawe College of Applied Arts and Technology in London, Ontario was "particularly interested in the exchange of students for cooperative education work semesters". Langara College in Vancouver, British Columbia wrote that it was "excited about" the prospect of collaborating with Australian institutions to enhance the flow of study abroad students. The idea was also supported by New Brunswick Community College - Saint John who saw it as an opportunity to enhance their internationalisation program.

The Atlantic School of Theology in Halifax expressed a keen interest in enhancing its level of exchange with similar institutions in Australia. The AST did not have any



existing exchange agreements with Australia as most theological students undertook the responsibility of preparing their own study. In their response to this survey the AST wrote:

*"AST would be interested in examining with other institutions in Australia the prospect of exchange students, and of making more widely known the resources that we provide in our ecumenical institution. AST is a unique theological school in that it combines the interests of the Anglican, Roman Catholic and United Churches in one institution. It may be of some interest to Australians to participate in our curriculum so that they can get a sense of ecumenical education as preparation for ministry and the study of theology".*

There was a degree of differentiation expressed over the nature of such exchanges with the Community Colleges. The South Winnipeg Technical Centre, for example, expressed a desire to exchange in the area of trades and technologies. This was echoed by several other of the college respondents.

### Joint Courses and Programs

In addressing this issue the general nature of the discussions which had taken place with the Australian institutions was outlined to those in Canada. Respondents were asked to indicate whether they would be willing to consider establishing joint programs or courses with Australian institutions along these lines. Eighty per cent of the responding Canadian institutions said that they would be willing to consider this option.

A wide range of different subjects were suggested as suitable for joint courses or programs to be established with Australian institutions. Among the most commonly mentioned subjects were Hospitality, Tourism, Business and Health Sciences. Teacher education and Early Childhood studies were also mentioned. Table 3.1 provides a summary of the responses.

**Table 3.1: Canadian suggestions of areas for the development of joint programs**

Proposing Institutions	Program Areas/comments
Algonquian College	Travel counselling & Business would be the areas worth exploring. A small number of students might be able to find the funding necessary.
Assiniboine Community College	Hospitality/Tourism, Rural Development, Business Administration.
Bishop's University, Lennoxville Quebec	Business, Teacher Training, English /French ESL, Summer course offerings could be tailor made to specific needs
British Columbia Institute of Technology	With TAFE as well as private VET colleges.
Camosun College	Tourism, Hospitality Management, Mechanical Engineering, Nursing, Dental Hygiene, Early Childhood Education

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Canadore College	Business, Information Technology, Hospitality, Interactive Multimedia, Biotechnology, Graphic Design, Law & Justice
Cabot College	Engineering technologies - biomedical, civil, geomatics, electronics, electrical etc.  Health sciences - lab tech, ultrasound, x ray etc  Business - marketing, accounting, management  Applied arts - graphic art, fine art, textiles etc.
Carleton University, Ottawa	Business and applied language studies are obvious candidates but there may well be others such as Public Administration
Eastern College	Business management, entrepreneurship, welding engineering technology, regional economic development, water resources technology
Georgian College	Our college specialises in Tourism Management, Civil Aviation, Marketing, Marine Engineering, Environmental Management, these are the most popular programs for international students
Humber College	Hospitality Management
Keewatin Community College	Business Administration, Computer Analyst, Natural Resources technology, hospitality and tourism, Industrial Electrical & Electronics and Health
Langara College	Pacific Rim Studies, Journalism, Display & Design, Environmental Studies, Native Studies, International Business, Social Work, Theatre Arts, Women's Studies, Canadian Studies.
Laurentian University	Mining and mineral processing and extractive metallurgy, international business, health, nursing, political science, child & development studies, human movement (kinesiology, outdoor adventure leadership)
MacMaster University, Hamilton Ontario	Engineering is the field of study that first comes to mind. Discussions with other Faculty Deans would not doubt identify other potential areas in which joint programs could be offered.
Medicine Hat College	English, Business, Travel & Tourism, Teacher Education, Communications studies, Management, Trades, Visual Communication.
Mohawk College	Hospitality & tourism, International Business development
New Brunswick Community College - St Andrews	Hospitality & tourism, fisheries, aquaculture
New Brunswick Community College - St John	Electronics, Mechanical engineering, business, computing, Health & Human development,
New Brunswick Community College - Woodstock	Graphic Arts, Journalism, Digital communications, photography, radio broadcasting, video/TV production, agriculture

Nova Scotia Agricultural College	Distance education programs.
Ryerson Polytechnic University	Business Management, International Trade, Hospitality & Tourism Management, Urban and Regional Planning, Communication Studies, Early Childhood Education.
Seneca College	International business, all types of computer programs, if sufficient student interest exists any program can be considered.
SIAST	Hospitality, Graphic Arts, Business, Computer technology, Agriculture and Health Sciences
South Winnipeg Technical Centre	Entrepreneurship, Computer Systems Technician, Network Support Technicians.
Southern Alberta Institute of Technology	Engineering technologies, Hospitality, Business, Health, Apprenticeship trades
St Clair College	International business, Information technology, Manufacturing & Industrial Technology
University College of Cape Breton, Nova Scotia	UCCB is a polytechnic institution offering a range of diplomas as well as degrees. We are a leader in Canada in credit transfer, especially in technical programs. This would interest us
Westviking College	2 year community studies

Any absence of University level programs in Table 3.1 does not reflect a lack of interest by the Canadian universities. It is more a measure of the relatively strong response to this question item by the Community Colleges. It was noted by the Community Colleges that the Australian TAFE College system was a suitable partner in developing such programs. As the Vancouver Community College explained in response to the suggestion that they consider establishing joint programs or courses with Australian institutions:

*"We have had numerous visits from staff and administrators from TAFE Colleges. We would welcome this activity".*

### Offshore Teaching Programs

The Canadian institutions were provided with a summary of the discussions which had taken place in Australia over the idea of institutions from the two countries collaborating to establish and run offshore teaching programs in third countries. Examples of how this might work were given. The Canadian institutions were then asked whether they were willing to consider working with an Australian institution in establishing a joint offshore teaching program in a target market. Seventy-six percent of the responding institutions indicated that they would be willing to do so. A further 14 per cent said no and the remainder were uncertain.

When asked for comment on which particular course or programs they considered would be suitable for offshore development, and which third countries they viewed as

worth considering a number of interesting responses were given. For example, Carleton University suggested that they would be interested in developing offshore teaching programs in the fields of Business and Applied Language Studies. They suggested that Australia and Canada might consider jointly targeting Latin America in particular Mexico.

The Royal Roads University expressed an interest in combining with an Australian university in delivering its Bachelor of Commerce and MBA programs, as well as its Environmental Science (BSc). They felt, however, that they may still prefer to work with another Canadian institution.

Ryerson Polytechnic University saw opportunities for developing offshore teaching programs with Australia institutions in such areas as Public Administration, Business Management, Engineering, Communications studies and Information Technology.

Assiniboine Community College saw opportunities for joint offshore programs in Malaysia, Indonesia and "Anglophone Africa" for hospitality and tourism, rural development, computer technology and business administration courses.

The Algonquin College of Applied Arts and Technology suggested that ESL and TESL programs might offer potential for joint ventures in Asia. They felt that the human resources were relatively easy to assemble, but that capital investment might pose a problem. These views were supported by Cabot College of Applied Arts and Technology who suggested China offered good potential for ESL programs. The British Columbia Institute of Technology was more sombre and wrote:

*"Course/Program areas would depend on the match between solid market demand and our joint program strengths. Business is easiest. Technical programs might be most contributory in the longer term".*

Camosun College said that they would be interested in working with Australian joint venture partners in establishing offshore teaching programs in China and Viet Nam. They suggested that Early Childhood Education, Tourism and Hospitality and ESL/EFL language programs would be the ones to start with.

Eastern College of Applied Arts and Technology stated that it had experience of running offshore programs in Thailand, Viet Nam, Tanzania and Malawi. The college was able to offer programs in engineering technologies, business studies, trades and university transfer or foundation studies. It indicated that it would be willing to consider offshore joint ventures with Australian institutions. Georgian College held similar views. They were already working in a number of Asian countries and were willing to collaborate with Australian institutions to further develop these markets.

Keewatin Community College in Manitoba expressed an interest in working offshore with Australian institutions. They identified teacher training programs for technical college faculty as one area that might be developed. Other areas included training administrative assistants, nurses and in college or university foundation studies. St Clair College also saw opportunities in China, Korea, Taiwan and India for the delivery of "machine and manufacturing technologies".

Georgian College, Fanshawe College, Kwantlen College and Langara College all expressed interest in developing offshore joint ventures with Australian institutions in the ELICOS/ESL area. Langara College also saw potential in a broad range of areas such as environmental studies, health sciences, international business, nutrition and food service management, real estate appraisal and property management, computer science and "programs for women".

Loyalist College in Belleville, Ontario suggested that they would like to joint with Australian institutions in offshore delivery of media studies, environmental engineering, early childhood education and gerontology. Medicine Hut College suggested teacher education, and visual communications as well as those already mentioned. Mohawk College thought that India and the ASEAN countries, especially Malaysia offered some potential for joint ventures. They felt that any such program should require "high knowledge and lower physical resources". Presumably to ensure that high capital equipment costs did not make the programs financially viable.

The New Brunswick Community College - St John summarised the overall mood of the Canadian response to the idea of establishing joint venture offshore with Australia when they wrote:

*"At present we are involved in bilateral agreements with Jordan and soon China. There is interest in this notion of joint teaching programs. However, more study would have to be undertaken before developing such programs"*.

These reservations were also shared by Seneca College who noted that while they did not reject the idea of collaboration in offshore programs with Australian institutions, they would require more information. Much would depend upon the target market, the type of business agreement drawn up, who the Australian partner was to be, how costs and revenues would be shared and any governance provisions required.

### **Project Work**

The survey described the notion of project work to the Canadian institutions and gave a summary of the level of interest in collaborative project work identified by the Australian institutions. The Canadian universities and colleges were asked to indicate whether they would be willing to consider working with an Australian institution in tendering for joint project work in third countries for projects funded by such groups as the Asian Development Bank or World Bank.

The majority respondents (80%) were positive about the idea of collaborating with Australian institutions over joint projects in third countries. As the University College of Cape Breton commented:

*"We have modest experience in Africa and South America and as a polytechnic are able to offer practical technical training and services which most Canadian universities cannot. We would welcome the opportunity to collaborate with an Australian university"*.

Carleton University also indicated that they were willing to consider collaboration with Australian institutions over project work. They noted that they were a member of the Canadian Higher Education Group (CHEG) which includes the University of Guelph, McMaster University, University of Waterloo and University of Western Ontario. The CHEG was established to provide a permanent alliance of the universities and a private sector organisation, the Hickling Corporation. CHEG seeks to target overseas projects using its combined resources for success. The group has undertaken a range of projects in over twenty-five countries in Africa, Asia and Latin America. According to Carleton:

*"We could consider a partnership with an Australian institution or group of institutions on individual projects, but at present Australia is a major competitor for us."*

McMaster University was also positive towards the idea of undertaking project work with Australians. They indicated that they had already collaborated with Curtin University of Technology for a program in computer-science in Sri Lanka. Royal Roads University was also positive, but they expressed some concern over the administration of joint tendering for projects. Who would assume responsibility of project leader, how would consultants and other experts be selected for participation in the projects?

Both the Technical University of Nova Scotia and Ryerson Polytechnic University expressed a willingness to collaborate with Australian institutions over projects. Ryerson noted that it had already participated in a number of projects funded by the World Bank and Economic Development Institute of the World Bank and would be willing to do so again with Australia. By contrast the Trinity Western University in Langley British Columbia was unwilling to enter into joint programs, offshore teaching or project work with Australia. The appeared to have some difficulties in accommodating any additional work stating that:

*"We cannot handle any more international agreements at the present time and turned down an opportunity to do so with a new Australian educational initiative".*

In the College sector the level of interest in project work was high with 86 per cent of responding colleges positive on the idea of collaboration with Australia. Algonquin College said that it was a member of a consortium of colleges - Algonquin, Humber, George Brown and Connestoga - led by the Hickling Corporation. This consortium was known as the Canadian Technical Vocational Group (CTVG). It grouped Colleges from the Toronto area. Similar in concept to the CHEG, the CTVG had already won a World Bank contract and were short listed for several ADB contracts in Asia. According to Algonquin, "A joint venture with an Australian partner would be of great interest".

Cabot College of Applied Arts and Technology stated that it had projects in India, China, Lithuania, Peru, Yemen and Libya. It had developed a highly successful corporate training model which they had been operating for some four years. They said they would "welcome the opportunity to work with Australia in this regard".

Their views were supported by the British Columbia Institute of Technology which stated that it was "definitely !" in favour of collaborative project work with Australia.

The Georgian College said that it was also supportive of joint project work. The college was already engaged in collaborative project work with institutions or partners in the United States, United Kingdom, China and Central America. They indicated that they "would welcome some Australian partners". Fanshawe College agreed and noted that the Association of Canadian Community Colleges (ACCC) had already established some precedent for collaboration with Australia. Mohawk College said that they were already engaged in a World Bank project and would be "delighted to work collaboratively in this area". The New Brunswick College - Woodstock were "extremely interested in such a partnership". Langara College went even further with the following comment:

*"We feel strongly that tendering with an Australian partner would greatly enhance our ability to win a project opportunity. We also feel that working cross-culturally with an Australian partner would add another positive dimension to our association".*

Other institutions were less enthusiastic. The Southern Alberta Institute of Technology said that they "did this already". Camosun College was not sure about project work. While "generally supportive" they questioned the practicality of joint management of projects which brought together institutions separated by such distance. New Brunswick College-St Andrews and the South Winnipeg Technical Centre (SWTC) were also uncertain. The SWTC stated that they were primarily interested in instruction. They did not wish to commit themselves to projects where it would be difficult for them to effectively deliver the services required. St Claire College, while in support of collaborative project work felt that any collaboration would require a "fair share" of the management power and compensation. They observed that many Canadian colleges were already in direct competition with each other for such project work.

### **The CANZIEG Concept**

The questionnaire also gave a detailed explanation of the idea of establishing a Canada, Australia, New Zealand International Education Group (CANZIEG) to provide a forum for exchange of information on international student flows, accreditation, quality control measures and marketing. The idea of the CANZIEG forum assisting with quality assurance and future cooperation between institutions was outlined, as was the idea of holding an annual conference.

Seventy-four per cent of the responding institutions indicated that they were supportive of the idea encompassed by CANZIEG. A further 19 per cent were unsure. The universities were more likely to be unsure of their support for CANZIEG than the colleges. Eighty-six per cent of the colleges were in favour of the idea, while half the universities were in favour and half were unsure. An indication of the views of the institutions may be gauged from the following list of comments which we have produced in full due to their self-explanatory nature:

*"The concept is quite congruent with current institutional initiatives (on the international level) at Seneca" - Seneca College.*

*"In principle, Ryerson would be interested in the concept of CANZIEG. The idea needs to be fully developed and articulated before a final commitment is made" - Ryerson Polytechnic University.*

*"This discussion should take place at a different level, for example with the Asia Pacific Foundation and the related Canadian Education Centres" - McMaster University.*

*"Again much would depend upon the administration details and the costs involved. In a period of more financial constraint it is difficult to take on additional tasks" - Carleton University.*

*"Bishop's would be very supportive of a collaborative venture by Canada, Australia and New Zealand. Programmes are well-matched and credit transfers are facilitated with the assurance of academic quality at the highest level" - Bishop's University.*

*"Competition is already quite tough among the three countries. It is important to focus on common interests and areas where we compliment rather than compete" - St Clair College.*

*"This would be interesting and useful for student flow and accreditation. We are supportive of the idea for project work" - Vancouver Community College.*

*"The idea is great, but we would have only limited financial resources to commit. Therein is our problem; we are a relatively small organisation, and thus limited in our capacity to participate internationally. We will try to utilise information technologies to gain maximum impact" - South Winnipeg Technical Centre.*

*"Fees for membership are a concern" - Southern Alberta Institute of Technology.*

*"Such an information exchange would be very valuable to institutions in the three countries. It would also be of value to utilise current technologies for colleges such as ours, which are not within the Asia-Pacific Region, but are located on Canada's east coast and are closer to Europe than the Pacific. With the use of such technologies, distance may not be as limiting to participation as they presently are" - New Brunswick Community College - St John.*

*"The idea is appealing to offset the huge U.S. initiative. From a marketing point, it could be a welcome shift from the to-date competitive stance taken by each nation. As with most collaborative efforts, the overall quality of service will increase in each country. The CANZIEG "block" would be a substantial force in the education sphere given the collective experience of all the players. For Canadians, we may work better together given a reason to work collaboratively with other nations. Our provincial education mandate generally works against our competition" - Langara College.*

*"Very enthusiastic about this concept" - College of New Caledonia.*



*"The high cost of travel to participate in meetings or conferences would prohibit our involvement" - Canadore College of Applied Arts and Technology.*

*"The focus of the CANZIEG Forum and issues identified in the previous page (of the survey questionnaire) are of significant interest to our college. Thus, we will welcome any opportunity to participate in the Forum. In the interest of reducing the financial burden to participating organizations, perhaps the site for the CANZIEG can be rotated between host countries" - Keewatin Community College.*

*"It is important to work on these items, but remember that there are so many organisation's trade fairs, education fairs and associations, conferences now that our resources both physical and financial are extended to the limit" - Georgian College.*

*"I believe that the existence of such an organisation would be beneficial to all of us, and could then provide the relationships upon which future work could be built" - Camosun College.*

It is apparent from the preceding comments that the response from the Canadian institutions toward the CANZIEG concept was generally positive. Concerns over the possible cost of membership or conference attendance are understandable and will require further consideration. However, these concerns cannot overshadow the level of enthusiasm expressed by the Canadian respondents.

## PART FOUR: THE STUDENT PERSPECTIVE

### Introduction

Face to face in-depth interviews and focus groups were held with students in seven institutions encompassing both higher education, vocational education and training and ELICOS programs. These students included both international full-fee paying students and Australian Commonwealth funded students. A survey was also conducted with both domestic and international students in twelve institutions throughout Australia. This provided a final sample of 879 responses. This section examines the findings of these investigations.

### Focus group discussions

In general the students were positive towards the idea of studying in Canada. This was most pronounced among the international students. For the Australian students, the main obstacle was a lack of funds to study abroad. When asked to account for the reasons why they had not chosen Canada as a study destination, the international students most commonly responded that they lacked sufficient information about Canadian education. Many of these students were unaware of the existence of the Canadian Education Centres (CECs) in their home countries, and it should be noted that these CECs may not have been established prior to the student leaving home.

### *Access to information on Canadian study options:*

International students from Korea, Indonesia and Malaysia expressed the view that information on study opportunities in Canada were not as readily available as information regarding study in Australia, the United Kingdom or United States. It appeared, however, that Canada was well known to students from Singapore and Japan. Canadian qualifications were highly regarded in Singapore, but as one Singaporean university student explained, Canada was ranked third behind the UK and USA as a study destination.

### *Attraction of "American English":*

Korean and Japanese students were particularly enthusiastic about Canada as a place to learn English with a "proper" accent (meaning a North American accent). It was their view that the ability to speak English with a North American accent was indeed important, especially for Korean graduates who aspired to be hired by American multi-national companies based in Korea. This view was articulated by one Korean student who had graduated from a Korean university and was in Australia completing an ELICOS course. He expressed confidence that his English language skills would enable him to secure a job with an American company, he said that he had not gone to Canada to study English because he had been unable to secure a visa.

**Visa issues:**

The issuing of visas was raised as a reason why several other international students had not chosen Canada as a place to study. An Indian student explained that he had been invited to attend a conference in Canada but had been refused a visa upon application. It remains unclear as to what influence Canadian immigration and visa regulations have upon student the flow of international students to that country. Discussions with Canadian immigration officials at the Canadian High Commission in Canberra did not resolve the matter. It was the view of the Canadian officials that no special restrictions applied to students from India or Korea and that until the individual case could be examined it would be difficult to explain why a particular individual did not succeed in getting a visa.

According to a survey conducted by *Language Travel Gazette* of international students enrolled in Canadian ESL programs, 43 per cent of Asian students expressed dissatisfaction with the visa application process (LTG, 1996). Korean students expressed the most dissatisfaction with the Canadian visa process followed by students from Taiwan.

Australia's visa regulations require that all international students (except New Zealand citizens) must obtain visas to travel to Australia. Since 1990 student visas have been streamlined into two types:

- **Category A** - primary or secondary school courses registered with State/Territory authorities, or post-secondary courses formally accredited and leading to an award granted by an institution generally at associate diploma, diploma or degree levels;
- **Category B** - any other registered course (DEET, 1992).

The introduction of a "one class system" for international students has been widely welcomed by the industry. However, concerns continue to exist over the time such processing takes (Logan, 1995), and the lack of standardised treatment of visa applications by DILGEA representatives in overseas missions (Guinery, 1995).

**Access to part time work:**

One of the attractions Australia appears to have had over Canada as an overseas study destination was the generous work provisions allowed under the Australian student visas. Australian visa regulations enable international students to undertake a maximum of 20 hours per week during semesters and full-time during vacations (DEET, 1992). While many of the overseas students take up part time or casual jobs during their stay in Australia, many do not work at all. For most students with whom we spoke the opportunity to work was "nice to have, in case you need it".

**Geographic proximity:**

As discussed in Part One, the close geographic proximity of Australia to many countries in the Asia-Pacific region is a major factor influencing their decision to study there. The discussions with international students in Australia supported this

view. It was also noted that Canada was not selected by many due to its greater geographic distance from their home countries. Climate was also seen as a negative issue for Canada. Students from countries such as Indonesia, Malaysia or Singapore found Australia convenient due to its warmer climate and closer geographic proximity. However, as these students completed their studies in Australia, many expressed interest in further education in Canada. The main barrier to their continuing their studies in that country would be the availability of financial support as many had exhausted their resources on their current study programs.

### *Perceptions of Canada as a study destination:*

Many of the students did not seem to have a clear idea of what Canada had to offer as an overseas study destination. This appeared to be partly related to a lack of marketing and promotion of Canadian institutions. Most students were unable to name a Canadian university. They did not recall studying a text book written by a Canadian author. Further, they had no idea as to the costs associated with studying in Canada. The majority of students thought it was much more expensive to study in Canada than it was in Australia. An engineering student from Malaysia, for example, had the impression that studying at a Canadian university was not only more expensive than an Australian one, but that the facilities were inferior. While most students agreed that Canada was a safer place to live than the United States, a few felt that Canada was dangerous, especially in the China town of Vancouver.

Canada was generally regarded as a very beautiful country. The image of Canada as a lush green environment with campuses set in classic gardens with rolling lawns and park like settings was appealing. There was strong preference among the Asian students for "large campuses with lawns and trees". This finding supports other research into international student selection of Canada as a study destination (LTG, 1996).

Another positive aspect of Canada's image expressed by the students was the view that Canada was somehow more "westernised" than Australia. This appears to reflect a commonly held view among Asian students that contemporary western civilisation is centred in North America. This could be a useful source of competitive advantage for Canada over Australia. As one commerce student from Hong Kong described her feelings, for those students who wanted to learn "different" things and return home feeling and looking "different", a Canadian education was attractive. Canada was also seen as a multi-cultural society and the large Asian population living in Vancouver was particularly well known among international students from Asia.

A surprising finding was that the proximity of Canada to the United States did not seem to be of great importance to the undergraduate international students as an attraction. It was felt that many students might view Canada as a staging point for visits into the United States during their studies. Most of the students with whom we spoke indicated that they would return home to seek employment in their own country upon completion of their courses.

***Summary of focus group findings:***

In summary, these focus groups suggest that Canada may not be selected by many international students due to a lack of adequate information about study options. Without more input from a larger sample it is difficult to draw definitive conclusions. However, these discussions highlight a general interest in Canada as a study destination among international students.

Literature on the marketing of services suggests that "the evoked set of alternatives, that group of products which a consumer considers acceptable options in a given product category, is likely to be smaller with services than with goods" (Zeithaml, 1991). It is therefore important for Canadian institutions to engage in marketing and promotional campaigns that can provide "top-of-the-mind" awareness among the students and their parents or advisers. These focus groups with international students in Australia indicate that Canada was not yet included in their "evoked set of alternatives" as a study destination.

**Student Survey**

During October and November of 1996 a survey was distributed throughout a dozen Australian colleges and universities. Participating institutions were Curtin University of Technology, the Royal Melbourne Institute of Technology, University of Western Sydney, Monash University, Edith Cowan University, Macquarie University, Murdoch University, University of Melbourne, the Australian Institute of University Studies, The Centre for English Language Learning (RMIT), and TAFE College students in Queensland. Some questionnaires were mailed directly to students while others were distributed by academic staff during classes. A final useable sample was collected from 879 students.

***Sample demographics:***

Just over half the sample (53%) were international students of whom 69 per cent were studying in Australia for the first time. Fifty-five per cent of the sample were female and the average age of the students was 24 years. Ages ranged from 16 years to 64 years.

The majority of the students (88%) were enrolled within their institutions on a full-time basis. Eighty-one per cent of the students were enrolled in undergraduate programs, 15 per cent in post-graduate programs and remainder in ELICOS, post-secondary diploma courses or other programs.

Due to the "convenience" nature of the sampling method used it was not possible to control the subject areas of the respondents. Eighty-four per cent of the students were enrolled in business, administration or economics programs. While this may appear to be a bias in the sample towards this particular field of study, it should be noted that in 1995 just over 71 per cent of international students enrolled in Australian institutions were studying business, administration or economics programs (DEET, 1996:15).

Table 4.1 compares the subject areas studied by the international students in sample with those from the true population of international students in Australia in 1995. It can be seen that despite the sampling method used the final proportions representing each subject area were equivalent to the true population.

**Table 4.1: Student fields of study - International student sample compared to true population of international students enrolled in Australia during 1995**

Field of Study	Sample pop. - international students	Total international students - Australia
Architecture, Building	0.0%	0.7%
Arts, Humanities and Social Sciences	4.6%	8.1%
Business, Administration & Economics	74.0%	71.4%
Education	2.1%	0.4%
Engineering and Surveying	1.6%	7.6%
Health, Community services	2.3%	0.2%
Land & Marine Resources, Animal husbandry	0.2%	0.5%
Law and legal studies	0.0%	0.0%
Science	3.2%	3.4%
Veterinary Science	0.0%	0.0%
Other	6.5%	7.7%
Total	100.0%	100.0%

Source: (DEET, 1996)

#### ***International students country of preference:***

Sixty-two per cent of the international students surveyed said that Australia had been their country of first choice. Of those international students who indicated that Australia was not their country of first choice, 55 per cent said that the United States had been. The United Kingdom was the first choice of 24 per cent of these students. Canada was the first choice of 11 per cent and New Zealand 3 per cent of the international students who had not chosen Australia as their first preference.

The students were asked to indicate key reasons why they did not go to their country of first choice. Nine reasons were provided in the questionnaire which had been identified in the earlier focus group discussions. Table 4.2 shows the results for each of the alternative study destinations. Distance and cost were listed as the most common reasons for the student having selected Australia rather than one of the alternative destinations. For Canada the issue of climate was significantly more important than for the other countries. As noted in Part One, Canada's image of having a cold, harsh climate serves as a deterrent for many Asian students particular those from tropical climate countries.

**Table 4.2: Key reasons why international students did not go to their country of first preference** [\* indicates a significant difference between the responses for the five destinations].

Key reason for not going:	USA	UK	Canada	NZ	Other
Agent did not recommend	3.4%	5.4%	5.6%	-	9.1%
Parents did not approve	23.0%	24.3%	27.8%	-	27.3%
Had no relatives/friends there	17.2%	13.5%	22.2%	20.0%	36.4%
Not enough information	11.5%	21.6%	27.8%	20.0%	36.4%
Qualifications not recognised*	8.0%	5.4%	11.1%	20.0%	36.4%
Culturally too different	4.6%	2.7%	5.6%	-	9.1%
Extreme climate*	3.4%	5.4%	22.2%	-	9.1%
Distance	35.6%	48.6%	55.6%	20.0%	18.2%
More expensive	34.5%	48.6%	27.8%	40.0%	27.3%
Other	24.1%	16.2%	11.1%	-	36.4%

Table 4.2 also highlights the influence of parents upon the final choice made by the students. Although not as important as distance or cost, it was relatively more important than the other reasons. A significant difference was also found (as measured by chi-square test to a level of 0.05) between the countries over the issue of whether qualifications would be recognised upon return home. The perception that the qualifications from Canada, New Zealand or other study destinations (eg. Japan, Germany) were not recognised was stronger than for the United States or United Kingdom. This suggests that the student may be poorly informed over the quality of Canadian education relative to that of the United States or Britain.

#### *Future study intentions:*

Just over half the international students in the sample (53%) indicated that they planned to continue on to further education once they had completed their present course. Among the Australian student group this proportion was 41 per cent which was found to be a significantly smaller percentage than among the international group.

Students were asked whether they would consider further study in a country other than Australia if they could afford to do so. Seventy per cent of the international students and 61 per cent of the Australian students indicated that they would do so. A chi-square test of the responses from these two groups found that the international students were more likely to respond positively to this idea than their Australian counterparts.

When asked to rank their preference for a future study destination after completing their courses in Australia, the United States was ranked as most preferred by both Australian and international students. In second place was the United Kingdom. International students were more likely to prefer the United Kingdom as an overseas study destination than were Australian students. Canada was ranked in third place. It was significantly more popular with Australian students than their international colleagues.

***Australian post-graduate students:***

Sixty-eight students in the sample (8%) were Australian post-graduates. Most of these students (57%) indicated that they would consider studying abroad if they could afford to do so. When asked if they would be able to pay full-fee costs for their courses if required, 32 per cent indicated that they could. When asked if they would consider studying at a post-graduate level overseas if they had to pay similar costs in Australia 39 per cent said they they would consider doing so.

The Australian post-graduate students did not significantly differentiate between the United States, Canada, the United Kingdom, New Zealand or other study destinations in terms of preference. It appears that they will consider all countries equally and have no pre-concieved bias.

***Australia-Canada exchange programs:***

Students were asked to indicate their level of interest in a range of potential study options which might be established between Australia and Canada. These encompassed study abroad options, joint programs, external study and delivery of Canadian programs via Australian institutions. The results of these questions are shown in Table 4.3 which also compares the responses from the Australian and international students.

**Table 4.3: Student interest in future Australia-Canada study linkages**  
[mean scores rated 1 = not at all interested, 7 = extremelly interested] [\* indicates significant differences between the groups at the 0.05 level as measured by *t* - tests].

Option	Total sample	International students	Australian students
	<u>mean</u>	<u>mean</u>	<u>mean</u>
Study abroad programs spending short periods in Canada	5.10	5.24	4.95*
Joint courses run by Australian & Canadian institutions	4.63	4.78	4.46*
Foundation or bridging courses started in one country and completed in the other	4.47	4.15	3.80*
Course offered by Canadian institution via Australian institution	4.05	4.10	3.56*
External study from Canadian university for credit to Australian program	3.98	4.66	4.26*
Post-graduate supervision from a Canadian university	3.84	4.14	3.88

The option of undertaking study abroad programs in Canada while studying in Australia was considered the most interesting to the overall sample. International students showed significantly more interest in this option than did Australian students.

Courses which would be run jointly between an Australian and a Canadian institution in which the student commenced the course in one country and completed it in



another was the next most interesting option. Once again the international students found this option significantly more interesting than did their Australian counterparts.

With the exception of the notion of post-graduate students having Canadian supervisors, international students were generally more interested in these options than were the Australians. Nevertheless the Australian students were mostly positive towards the ideas.

#### *Conclusions from the survey:*

The findings from this survey suggest that while Australia is the first preference for many international students, it is chosen by others who would rather go elsewhere. Their decision to choose Australia is due to its geographic proximity, mild climate and the influence of family and relatives. Canada does not appear to be prominent among the international students who come to Australia as a preferred study destination. It would seem to suffer from its image of having a harsh climate and being a long distance from Asia.

A relatively large proportion of students (both international and Australian) are planning to undertake further study programs and many seem interested in considering completing this study outside Australia. Although most Australian students are unlikely to possess the financial resources to study overseas, there may be sufficient numbers to justify a targeted marketing effort by Canadian institutions.

Finally, the level of student interest in the various study opportunities outlined in Table 4.3 was high. This should be encouraging to both Australian and Canadian institutions considering the development of future links in these areas. While this survey should not be considered a definitive study, it does offer a useful insight into the general perceptions of students towards the concepts discussed elsewhere in this report.

## PART FIVE: THE POLICY IMPLICATIONS

### Introduction

Given the increasing trend in the world economy away from an industrial goods-based paradigm and into an information-knowledge based one, the global education and training industry is likely to be one of the most important for the next millenium. Assessments of the projected growth in the world's international education industry suggest that by the year 2010 there will be 2.8 million international students throughout the world. This number will be expected to grow to 4.9 million by 2025, of whom 59 per cent will come from Asia (Blight, 1995). Trade in international education has been valued at US\$28 billion in 1996 and is estimated to grow to over US\$88 billion by the year 2025 (Humphries and Ramezani, 1996).

Canada and Australia are important participants in this newly emerging global education and training industry. Its features are a lack of national boundaries and a willingness for its student customers to seek out the best value for money services and invest heavily over a four to five year period. The motivation for the student customer is the long term financial returns to their investment in education. Although a somewhat contentious issue, the available research suggests that the returns for most international students are substantial (Lewis, 1992; Lewis and Shea, 1994). Further, as many people will require continual education and training throughout their lives the industry is well placed for long term sustainability.

The findings from this study suggest that there is strong interest within Canadian and Australian education institutions for greater collaboration in this industry. Equally important are the results of the student survey which indicate that there is also strong interest from the potential client base for these initiatives.

### Compete or Collaborate ?

Before considering the possible future actions which might stem from this research, it is worthwhile pausing to consider whether it would be better for Canada and Australia to compete or collaborate. This is an important question as the findings from this research suggest that the competitive orientation is strongly entrenched within many institutions, particularly among those in Australia. Should competitiveness dominate any future relationship between the two countries, the chances of effectively realising the potential offered by the collaborative opportunities will be lost.

As noted in Part One of this report, Canada has experienced a relative decline in its market share when compared to Australia. At the same time Australia's overall growth in international students has been significantly positive and against the trend in most other major supplier countries (Kemp, 1990, 1995). Australia's international education industry is justifiably proud of its achievements over the past ten years. The revenues from international student fees have now become an important source of income to Australia's higher education institutions. They are already essential to most of the non-government post-secondary colleges.

However, with the erosion of government funding for higher education in Australia, the dependence upon international student fees is becoming even more important. Faced with the prospect of reduced government financial support and the need to replace that income from fee paying students (both international and domestic), it is not surprising to find reluctance among Australian institutions towards collaboration with Canada.

The argument in favour of competition appears to be based around the inherent risk of diluting the brand image that has been developed at considerable cost by both countries. According to this view collaboration via joint promotion in third country markets is fraught with risk for institutions in both countries. Successful promotional strategies should seek to brand and position the two countries and their institutions as attractive study alternatives in their own right. For Australia and Canada to work together may confuse the market and diminish the profile of both countries.

In considering the question of whether to collaborate or compete, the following points should be noted:

- Australia's growth rate in international student enrolments has been from a low base and appears to be slowing down in recent years (Unesco, 1992; 1996; DEET, 1992-1996). It is questionable whether Australia can sustain annual growth rates in excess of 10 per cent. Further, even if Australia does manage to maintain such growth it is unlikely that its relatively small education sector will be able to indefinitely absorb such flows of overseas students.
- Canada's relative decline has occurred against a background of a poorly coordinated national marketing effort within that country. Evidence suggests that Canada is now awakening to the need for a concentrated and nationally coordinated international marketing strategy. Canada has a much larger "supply-side" than Australia with more institutions and potentially greater capacity to absorb international students.
- The major competitors in the international market place are the United States and the United Kingdom. Both these countries - in particular the United Kingdom - are beginning to treat international education as an important export industry. Enhanced marketing efforts by these two major players is likely to pose a more significant threat to both Australia and Canada than either of these two do to each other.
- This research suggests that Australia holds a competitive advantage over many of its competitors including Canada due to its geographic proximity to many key markets in Asia. Other factors such as a mild climate and the perception of being a low cost study destination are also important. However, the relative cost of Canadian education is highly competitive with that of Australia. Enhanced information flows to prospective students via a well managed and professional Canadian marketing effort could see that country claw back some of its market share from Australia.

Increased competition between Canada and Australia for international students implies the existence of a "Zero sum game" whereby a finite number of students are attracted to either country. What this study has attempted to demonstrate is that via collaboration, institutions from Canada and Australia can actually enhance their market share. The results of the student survey outlined in Part Four suggest that there is potentially strong interest by students in many of the initiatives proposed by this study. These initiatives offer institutions an opportunity to attract students to undertake short study abroad programs and joint courses that will have financial benefits to both countries.

A final and most important reason to select collaboration over competition relates to the outlook for international education in the next century. The transition from narrowly focused, nationally based economic systems toward globally oriented borderless ones is a feature of the late 20th century (Ohmae, 1994). International education and training will need to embrace this transition in order to remain competitive and relevant. Through collaboration Canada and Australia can enhance the internationalisation of their respective education systems, and position themselves in the eyes of their prospective overseas markets as quality destinations which offer a pathway to truly global education.

### **Future action required**

Several initiatives for the enhancement of collaboration between Canada and Australia in the field of international education have been outlined in this study. These initiatives range from the relatively simple exchange of promotional materials to the development of joint programs. As the responses from the various institutions in the two countries show, there appears to be a strong interest on both sides for these initiatives.

In Annex A of this report we have provided a list of all the individual institutions and organisations who participated in the study. This list is provided in order that the reader may take the opportunity to contact their colleagues in Canada or Australia and seek to develop these initiatives further on an individual basis.

However, in addition to any individual institutional actions it is suggested that a degree of leadership is required from Government or industry groups to fully develop these initiatives further. The Government of Canada, via its Department of Foreign Affairs and International Trade (DFAIT) has been responsible for commissioning this study. It is to be hoped that the Australian Commonwealth Government via its various agencies, the Australian State and Territory authorities and the Provincial Governments of Canada will seek to support these initiatives.

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