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Meeting the World Half Way: Towards an Australian School Sector Strategy

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3. INTERNATIONAL STUDENT MOBILITY AT SCHOOL LEVEL: POLICIES AND PRACTICES OF COMPETITOR DESTINATION COUNTRIES

This section treats other countries from the perspective of competition for fee-paying international school students. It deals only incidentally with other aspects of international education.

3.1. Traditional Competitor Destination Countries with English as Mother Tongue

3.1.1. Overviewing the big four: UK, USA, Canada, New Zealand

Given that competence in English as the key international language required by a globalised age underpins Australia's success in international education, traditional competitor destination countries are those which also offer English mode education. Major competitor countries in this respect are: UK, USA, Canada and New Zealand. In Section 3.2 below the emergent competitors offering an English language mode schooling are discussed.

Through the legacy of the British Empire and contemporary Commonwealth links, the *UK* and particularly England has a longstanding set of connections to countries across the globe, of which education is a central part. The British Council is a prestigious cultural organisation which has an international network of staff who perform a range of commercial activities. The British boarding school, and notably the famous Public Schools, conjure up a much admired image of quality school education - and privileged access to life opportunities. Also important in this respect is a long established tradition of access offshore to British higher education – initially through the University of London external degrees, dating to its foundation early in the nineteenth century and, in the twentieth century, the British Open University. Their relevance to a schools sector strategy is subtle rather than direct – a system of prestigious institutions accessible to anyone, anywhere in the world, so-called 'space and time free' education. The UK also benefits from its European location and access by EU countries, many of whose people also wish to master the English language.

Over the past 60 or more years the *USA* has held the role of superpower - first in balance with the then Soviet Union, and since 1989 as sole superpower - and a dominant cultural force in the arenas from which Australia's international students have to date mainly been drawn. Thus, although there may be little by way of cohesive national level policy concerning international school students, and even disincentives in the form of increased visa restrictions since 2001, the USA remains a powerful drawcard for international students. The USA has also long cultivated the educational and cultural ideal of study abroad, most clearly in higher education. A federal system, with differences at state and local education district levels, the US has created an extraordinarily rich, diverse, multilayered structure of educational provision. Yet generalisations about the USA have to be qualified since, common elements notwithstanding (which include the image of 'a common school', standardised testing for college entry and basic curricula and assessment structures), there are significant regional, state, district and local variations.

Sharing a border with the USA, *Canada* is sometimes seen as having an advantage at the school level by virtue of its location as an entry point for subsequent study in the USA. Canada, however, needs to be considered as a significant destination in its own right, with a higher education system considerably strengthened in recent years, especially through targeted research funding. Schools in Canada are a provincial and local responsibility, but for international education there is a national profile.

Located in the same geopolitical area as Australia, *New Zealand's* key markets for international students are very similar to those of Australia, with heavy reliance on a small number of Asian countries. As in other domains, New Zealand educators see Australia as a rival and take a keen interest in this country's policies, programmes and practices.

3.1.2 *United Kingdom*

To qualify to study in the UK as an overseas student, a person must be able to show acceptance for a course of study at an educational establishment on the UK *Department for Education and Skills* (DfES) *Register of Education and Training Providers*. At the school level, this means a full-time course at an independent fee-paying school. It appears that schools in the state sector are not involved or if so are not visible. Students must be able to fund their course and support themselves while in the UK without any help from public funds. Further entry requirements, including visa, depend on the nationality of the prospective student. Thus, to all appearances, in the UK the recruitment of overseas fee-paying school students is through the independent school sector, from which over 1,250 schools are registered providers.

Against a background of 'the growing competitive threat and changing market', the *Prime Minister's Initiative* launched in 1999 and concluded March 2005, sought to increase the number of non-EU students studying in the UK. Specific growth targets were set (and met) for students at higher education institutions (to increase by 50,000 by 2005) and in further education institutions (to increase by 25,000 by 2005). No specific targets were set for independent schools, and no significant increases occurred during this time period (see below).

The DfES took the lead in the PMI. Key elements were:

- a world-wide promotion campaign based on the *EducationUK* brand (managed and delivered by the *British Council*) to achieve global penetration for the credentials of UK education and training;
- extending the UK's global outreach and marketing via the EducationUK website (<http://www.educationuk.org>), a fully searchable database of some 240,000 courses in the UK, enabling students to enquire about and apply for a course online;
- streamlining entry and visa arrangements for international students;
- making it easier for international students and their dependants to work in the UK; and
- increasing the number of Chevening (postgraduate or research) scholarships in the UK.

The British Council led on the brand and marketing campaign. The Education UK brand and website lists 1,273 out of the total 1,276 accredited independent schools. This listing is free, but any additional advertising on the site is charged at a premium.

Publications to come out of Education UK and the British Council that specifically contribute to the recruitment of overseas fee-paying primary and secondary school students include:

- the Education UK country websites, of which there are 25 different country versions (involving eleven languages), provide detailed local information on subjects including visas, guardianship and scholarships. All major student markets have their own versions of the website;
- the *Essential Guide to UK Education* a 'definitive guide to UK education' for the exclusive use of British Council staff, and representing the combined efforts of a range of expert educational sources (independent schools and colleges and the Independent Schools Information Service included). This acknowledgement of the independent schools indicates an understanding within the British Council that their counsellors are representing that market as well as the more assiduously targeted further and higher education sectors; and

- the *UK Boarding Schools Guide* (2004), co-branded with Hobson's Publishing, containing information about choosing a UK boarding school, student welfare and support, UK qualifications, the application process, education agents, guardianship and much more.

Education UK also offers a *partnership* scheme on a subscription basis. Partner institutions are promoted at education fairs, exhibitions and events; are included in a range of promotional publications; have their institution directly marketed within different country and regional sectors; have access to staff development and training; attend an annual development conference; and are represented in marketing campaigns within the UK and overseas. Education UK partnership is delivered in nineteen countries, via thirty offices, with particular emphasis on SE Asia, South/Central America and a move into Africa.

Partnerships appear to operate primarily in the higher and further education sectors since only 29 independent schools are partnership members of Education UK. According to the Independent Schools Council (ISC), a degree of dissatisfaction was found working within the Education UK brand, including some restrictive practices (such as having to attend education fairs as separate institutions, rather than under the auspices of the Independent Schools Council, which could be more cost effective for the individual school). Education UK partners pay for representation and attendance at education fairs and events, but at a lower premium than non-partner institutions.

The streamlining of visas, and the assistance available to families in completing their visa applications is an Education UK/PMI initiative that could be expected to have a positive effect on numbers of children coming into the UK education market. Straightforward visa applications now have a turnaround time of 24 hours, with a maximum 10 day turnaround time for non-straightforward applications. However, as of 1 July 2005, visa costs doubled from £36 to £85. The ISC attributes the fall in overseas enrolment in their 2005 census to this factor, as well as the doubling of Education UK marketing (partnership) costs.

The PMI has been followed by a new strategy called *Positioning for Success*, an interim measure throughout 2005-06 while development work continues on a future Education UK Global Strategy. The key focus continues to be further and higher education; no discussion is apparent of pathways involving schools in UK strategic documents; the British Council stakeholder consultation of 2003 did not include schools, and no targets are set for increasing enrolments at school level.

Despite strong strategic focus on the further and higher education markets, there is no evidence of a formal strategy, policy or active intention on the part of UK governmental authorities to recruit into the fee paying school market. At the very least, this suggests a lack of joined up government, and more interestingly, it may help to explain why the numbers have not moved markedly following the launch of the Education UK brand. Unless the schools sector is targeted – and supported – for growth, there seems to be little incentive to individual schools to recruit more students from overseas. Lack of growth may also indicate the difficulty of expanding the boarding school market, even if the government wished to do so. It would be useful to probe more deeply into the reasons behind what appears to be something akin to benign indifference to the school market. It has not been possible, for example, to establish whether this signifies some lack of confidence in its future.

Census figures from The Independent Schools Council census reveal a steady state in new enrolments of overseas children¹ in fee paying schools (excluding armed forces and ex-pat British children): 1999: 7,460; 2000: 8,012; 2001: 7,803; 2002: 8,092; 2003: 8,344; 2004: 8,294; and 2005: 7,572. New enrolments peaked in 2004, with 2005 figures just slightly above those for 1999. For 2005, out of 7,572 new pupils:

- 4,224 went to senior schools (mostly co-ed but some boys); and
- 1,431 went to girls, schools (senior)

of the remaining 1,917, the majority went to prep schools.

¹ Those students enrolling for the first time. These would equate with 'commencements' in AEI statistics.

The ISC census does not provide total numbers of attending overseas students, however a record of total numbers enrolled at day schools (942) and total numbers enrolled at boarding schools (14,748) provides a total of 15,690². The number estimated by DfES and the Independent Schools Council is 16,000, so this figure is very near the estimate. It is clear that the vast majority of overseas students are boarders with a small number living either with family or in home-stay accommodation (which is British Council regulated on an optional basis). Over the longer term the trend has been upwards, as according to DfES figures, between 1993-94 and 1996-97 overseas student numbers entering independent schools rose by 12 percent.

The biggest *overseas markets* for UK independent schools are Hong Kong, mainland China and Germany. New pupils arriving during 2004 (who are counted on the 2005 census) show:

- 2,028 from Hong Kong (26.8 percent of total overseas enrolments but down 8.6 percent from the previous year);
- 1,020 from mainland China (13.5 percent of total overseas enrolments but down 8 percent from the previous year); and
- 878 from Germany (11.6 percent of total overseas enrolments but down 9.9 percent from last year).

Despite the drop in those markets, Hong Kong and mainland China still represent about 40 percent of the total overseas pupil population. The market to drop the most was the South Asian Subcontinent with 195 pupils (2.6 percent of the total and a drop of 134.4 percent). Other significant markets to fall were: Russia (by 19.7 percent); North America (by 15.2 percent); Thailand (by 26.1 percent); and South Korea (by 28 percent).

Markets which strengthened were: France with 162 pupils (2.1 percent of total and up 9.5 percent); Spain with 350 pupils (4.6 percent of total and up 3.9 percent); African countries with 367 pupils (4.8 percent of total and up 1.9 percent); Taiwan with 108 pupils (1.4 percent of total and up 13.7 percent - the biggest increase); Japan with 291 pupils (3.8 percent of total and up 5.8 percent); Malaysia with 140 pupils (1.8 percent of total and up 4.5 percent); and Remainder of Far East with 195 pupils (2.6 percent of total and up 1 percent).

Boarding and day fees vary from school to school, and by status, location and year level of study. For 2005, boarding fees per term (three terms per school year) ranged from £3,401 (Northern Irish average) to £6854 (the Greater London boarding average). The majority of boarding fees across the country are in excess of £6,000 per term. Day fees per term ranged from £575 (Northern Irish average) per term to £3,839 (Greater London average) with the majority across the country exceeding £3,000 per term. Each school can set its own fee policy, however there is no evidence that there are higher fees for overseas than for domestic pupils. Levies on fees are not payable to the Government but, as indicated above, there are government charges for promoting the schools.

A survey of 121 *independent school budgets for marketing*³ published in 2002 indicated an annual average marketing budget of just under £34,000, with a range from £5,000 to £90,000. According to figures from the International Schools Council International Office (which recently closed) in addition to any marketing through the British Council and Education UK, independent schools work with about 150 overseas agents to promote their schools in the international market.

The most recent survey conducted on *educational pathways* indicated that in 1999 over 70 percent of overseas school students continued on to higher or further education in the UK. This figure, still used on the Independent Schools Council census, is anecdotally verified by the schools who see equivalent numbers on an annual basis continuing on with their education in the UK.

² ISC census data collection does not provide total numbers of attending overseas students. However, they do have a total number of fees collected from overseas students. This figure is an ISC statistic, but it refers to the fee rather than the student.

³ by RS Benchmarking (now known as RS Academics)

Exchange programmes and overseas trips in the independent sector are all organised at an individual school level, and seem to form a significant part of most schools' curriculum. In the *state sector*, there is also a push for international partnerships but this is primarily administered through various EU initiatives, such as the Socrates project and the European Youth Programme. There is also a DfES led/British Council-managed programme called Global Gateways with the remit 'to bring an international dimension to education'. None of these are fee-paying, or involve fee-paying students; they are primarily aimed at helping schools in the state sector form partnerships across Europe.

With regard to the curriculum of domestic schools, the recent DfES strategy document *Putting the World into World-Class Education – An international strategy for education, skills and children's services* (2005) outlines and expands on three central goals: equipping children, young people and adults for life in a global society and work in a global economy; engaging with international partners to achieve their goals and those of the UK; and maximising the contribution of education and training sector and university research to overseas trade and inward investment. While strong emphasis is given at the school level to strengthening an international dimension within the education of domestic students (including language learning), and strengthening school level partnerships (including The Global Gateway website initiative), no mention is made of expanding the number of international students at school level – only further and higher education are targeted.

In the UK, there is no legislation in place to make *guardianship* a legal requirement. It is left to the discretion of the school as to whether they require their overseas students to have an appointed legal guardian in the country. According to The Association of Guardianship (TAGS), one of two self-regulatory authorities for guardianship, reputable schools will make guardianship a requisite requirement but others will not, as there is a cost factor for families and the school that demands it is perceived to be at a competitive disadvantage. An officer of the Boarding Schools Association indicated that the vast majority of accredited boarding schools require all overseas parents to appoint guardians.

Guardians and guardianship organisations (of which there are legion) are not legally required to be regulated, or to conform to any set standard, nor are there current plans to bring this into effect. The two organisations (TAGS and the Association of Guardians in Independent Schools (AEGIS)) that attempt to regulate the industry subscribe to the expected standards. These are: criminal record checks for all guardians, host families and any adult likely to come into contact with the child through the course of their studies; provision of 24 hour support and emergency back-up should the child need to make contact in an emergency; and home visits and inspections for host families. These are families appointed by the guardian for the child to stay with on weekend and half-term breaks - the guardian (presumably unless a family member) does not provide this home-based support, but is available via phone 24 hours a day for emergencies, is the point of contact for overseas families, and becomes involved in any problems the child may have in his/her school or leisure activities. TAGS and AEGIS are both OFSTED (Office for Standards in Education) inspected⁴.

⁴ Neither is there any set legislation for delivery of the student to the school. Children who fly into the country as unaccompanied minors are in the legal care of the airline until someone signs for them. This may be an appointed guardian, family member, or school representative. The care of the child then passes to that person until he or she is delivered to the school, at which point the school takes over duty of care. Schools are left to sort out their own arrangements for the delivery of children, and to set their own rules for guardians in the early days of the children settling into the school.

Homestay accommodation is rigorously scrutinised with an accreditation process under the auspices of the British Council. The accreditation handbook indicates that host families should treat the student as a full member of the household, eating together and sharing the common living areas. Students should expect the basics of cleanliness, sufficient heat and lighting, provision of meals, through to individual study desk, a laundry service, a sufficiently spacious bedroom etc. Those applying for homestay accreditation must be inspected prior to accreditation and the placement of any students. For those providing homestay accommodation to pupils under 18, Criminal Record Bureau checks are mandatory and other legislation for the protection of minors is also assumed (e.g. an adult must be in the house overnight). Despite this accredited system of homestay accommodation that subscribes to expected standards of care and protection, there is no legal obligation for families and students to use accredited homestay accommodation.

The British international school student market thus appears to be less structured and regulated than the Australian and is certainly less well documented. This reflects the strength and independence from government of the independent school sector, and the relative recency of powerful central government initiatives in school education as distinct from local education authority control. For the past two decades these national initiatives have centred on domestic issues, with a drive to construct a national curriculum with pre-defined student standards and a strengthening of procedures for monitoring and evaluating student – and teacher – performance.

Off-shore British schools remain unregulated and unmonitored by the British government, with the exception of British armed forces schools, and EU schools run for the children of EU officials. In the fee-paying sector there is a lack of government involvement and monitoring (to the extent that when a complaint was made to the DfES against one of the schools a couple of years ago, the response was that it was outside the jurisdiction of the DfES and the UK government). According to an official in the DfES European Schools section, fee-paying off-shore schools are 'not bound by statutory legislation that operates in the UK'.

There is a self-regulatory umbrella organisation called British International Schools Worldwide (BISW), which is a new initiative implemented by three smaller self-regulatory organisations: COBISSEC (Council of British International Schools in European Communities); FOBISSEA (Federation of British International Schools in South and East Asia); and BSME (British Schools in the Middle East). Between them these groups represent schools in over 40 countries, and something in the region of 100,000 students. The main purpose of these organisations, now operating under the auspices of BISW, is to set a British standard of education - all member schools have to follow the British national curriculum and matriculation (or IB), and are inspected by the Independent Schools Inspectorate. All affiliate schools have to follow the British national curriculum but are not necessarily subject to inspection. BISW points out that there is no governmental legislation or jurisdiction over any of the off-shore schools and that therefore, outside of membership of BISW organisations, no guarantees of educational standards or codes of behaviour can be given. It is important to note that a major reason such self regulating organisations have come into being is to differentiate themselves from schools that might (and some do) call themselves 'British' as they teach English even if they have nothing to do with UK curriculum or staffing.

A further and most important way in which UK education is available internationally is through the *examination boards*, business organisations offering examination services at GCSE and at GCE A level. The one with the highest international profile in the Asian region is Cambridge International Education (CIE), formally established in 1998 as part of the Cambridge Assessment Group, a department of the University of Cambridge and a not-for-profit organisation, whose antecedents date back to 1858. CIE claims to be the world's largest provider of international qualifications for 14 to 19 year olds, and has an extensive network of regional representatives. Among school level qualifications it offers internationally are: International General Certificate of Secondary Education (IGCSE), International A and AS levels.

A new pre-university qualification to be offered as an alternative to A levels is currently in the development phase (referred to as Cambridge Pre-U), with first drafts of a range of syllabuses expected to be available by September 2006. These international syllabuses, like those of the International Baccalaureate, are designed specifically for an international audience, to suit a wide variety of school settings, and to avoid cultural bias as far as possible. As in the establishment of the University of London, initially as a degree awarding, not a teaching institution, the use abroad by the UK of the mechanism of a prestigious qualification must be seen as a key factor in a successful strategy of penetrating international markets.

This strategy may in part explain why the Government is setting targets at the further and higher education levels, but is not seeing schools as part of its international recruitment strategy. Consequently there is not in the UK a focus on pathways which might include the school sector. The availability – and promotion – of UK secondary school qualifications in overseas countries is a strategic alternative to onshore teaching of large numbers of overseas students. Overall, it seems that any best practice lessons that UK experience provides are likely to be through understanding how effective prestigious exams are as a pathway into in the higher and further education sectors. Very important too, is the British Council - a strong, resourceful and highly regarded single voice whose mission is to promote UK educational, cultural and economic interests – whatever they may be – worldwide. This is a global strategy, adapted to different global regions and markets.

3.1.3 *United States of America*

It is an oversimplification to regard the United States as a competitor country given the scale and diversity of international activity, the global economic, political and cultural power the country exercises and the absence of anything resembling a nation-wide drive to draw in fee paying overseas school students. Nor is the US a source country for Australia, except for study tours and exchanges.

US higher education has long been a global force (learning, incidentally, from Germany late in the nineteenth century how to recreate its universities as research and scholarly centres on the Humboldt model and therefore attractive to foreign students seeking high level careers). The extent and quality of educational research in the United States, its inventiveness and influence in such fields as curriculum design, pedagogical theory, student assessment and testing, teacher education and the organisation, administration and financing of education have given the country's educational apparatus world-wide prominence. Perhaps most important, since the Second World War is the pervasiveness of American culture and the country's appeal to creative, ambitious people of all descriptions. It is not so much that education has to market itself, the country markets education or at any rate higher education as integral to the American way of life – and opportunity. The answer to the question of how overseas students access the college pathway lies in the classic educational screening device, a public examination.

Because of the diversity of US schooling, the *Scholastic Aptitude Test or SAT* has been developed as a common entrance examination into higher education institutions across the country, to compare students fairly and equitably regardless of where they went to high school, whether within the US or in other parts of the world. Most US universities and colleges require the SAT in addition to high school grades as part of their selection process. The SAT is designed to assess ability and acquired knowledge in a broad fashion so that it does not depend on the specifics of any curriculum. A long established point of entry to US higher education, the SAT was first developed in 1928, and has been periodically updated, most recently in 2005. It is offered several times during any calendar year. The SAT Reasoning Test is a three hour and 45 minute test measuring critical reading, mathematical reasoning and writing skills; SAT Subject Tests are a battery of one hour, mostly multiple choice, tests measuring academic subject knowledge and its application.

The SAT is one of the best known programmes of the College Board, a not-for-profit membership association, founded in 1900, comprising more than 5,000 schools, colleges, universities and other educational organisations. According to the College Board, the democratising benefit of the SAT is that individuals can provide evidence of their credentials without regard to their family backgrounds and location, and despite inconsistent grading systems and curriculum standards among the country's high schools. This applies equally to the international setting: there are many examination centres around the world where foreign students can – without the need for a specific study preparation programme - take the SAT test as part of their entry qualification for higher education study in the US. Thus, study pathways to US tertiary study have not been built in such a way that foreign students studying domestically at a US high school would necessarily have an advantage over those applying from their home countries.

The United States, the world's largest economy and most technologically advanced country, depends on a continuing inflow of students, particularly at the graduate level to drive innovation and growth. Its international education policies are focussed on economic competitiveness (for which improving school education quality within the country is seen to be essential, as is the capacity of colleges and universities to pull in able students from other countries), and on international relations (given much less attention at the school than at the higher education level). Any decline in the attractiveness of the USA as a study destination seems to reflect contingencies such as the crisis of the terrorist attacks, visa restrictions and global image problems in the aftermath of the war in Iraq. Restrictions on entry and growing unpopularity in the Islamic world have provided openings for other countries, Australia included, to strengthen their competitive position.

More so than with any other country, it is necessary to consider the global position of the USA and the overall public policy environment in reviewing trends and projecting possible developments in international education. It must also be recognised that for several decades the focus of national level efforts in schooling, including resolutions of the state governors and successive presidents have been on quality improvement in American schools, for American students. The classic statement of this is *A Nation at Risk*. Produced more than 20 years ago, its message that radical improvements are needed in American schooling still resonates. There is a continuing, underlying anxiety over the decline in competitiveness and a constant search for new ways to achieve a higher international standing in educational performance by American students. Despite the clear definition of the task and the numerous initiatives at state and federal level, the evidence of the international surveys of school student achievement shows little (relative) improvement. But, given the role SAT plays as a pathway to higher education, the variable quality of American high school education does not perhaps matter in the international market.

So far from promoting or facilitating access to American schools by overseas fee-paying students, in 1996 the US Congress passed a law that placed restrictions on foreign students (*F-1 nonimmigrant visa*) in US public schools: foreign students are prohibited from attending public elementary schools (kindergarten through eighth grades); there is a limit of 12 months on attendance at a public high school; and foreign students at high school must pay the school the full, unsubsidised per capita cost of education (as calculated by the school). Costs normally range between US\$3,000 and US\$10,000. Foreign students can, however, enrol in approved private elementary or high schools without time restrictions. As with the United Kingdom, US policy is focussed on international students at the tertiary level, and school level students appear to be largely in the private sector. To qualify for the F-1 academic student visa, students need to provide evidence of academic achievement, and financial evidence of sufficient funds to cover tuition and living expenses during the study period.

The US operates an *Exchange Visitor Programme* under the provisions of the Mutual Educational and Cultural Exchange Act of 1961, designed to increase mutual understanding between Americans and people of other countries through educational and cultural exchanges. Secondary students are one of a number of exchange visitor programme categories. One year is the maximum length of enrolment for a high school exchange programme. To qualify for an exchange visitor (J) non-immigrant visa, a student must first be accepted as a participant in an exchange programme through a designated sponsoring organisation. In the US there are a large number of organisations arranging student exchange programmes at the high school level (eg. AFS and Rotary). By contrast with students on an F-1 visa at public high schools, students on a J-1 visa may be able to enrol on a tuition-free basis at the discretion of local school districts, where students are part of an approved exchange programme which provides reciprocal tuition waivers for similar full time study experiences abroad.

While it has not been possible during this project to establish overall numbers of either full fee paying overseas school students or secondary level exchange students in the US, it is evident that limits are placed by school districts on the numbers of exchange students which schools may accept in any one year. The Portland Public Schools District in Oregon, for example, indicates in its procedures and guidelines for enrolling foreign exchange students that: exchange programmes will be limited to 10 students per school for the school year; tuition will be waived for students sponsored by and placed by district approved exchange programmes; host families must be informed that exchange students are expected to attend the neighbourhood school of their host family, and except in the case of extreme hardship, a foreign exchange student will not be transferred *from* a school with fewer than 10 exchange students or *into* a school with more than 20 foreign exchange students (exchange students may not take precedence over resident students who are requesting a transfer); students shall not be over 18 years of age on the first day of attendance.

Changes introduced shortly after September 11, 2001 involve extensive and continuing reviews of how *visas* are issued with respect to national security concerns. Visa applications are now subject to a greater degree of scrutiny than in the past, and additional screening of applicants is undertaken. For example, all people over the age of 13 and below 80 are now interviewed for student or exchange visitor visas. Thus visas need to be applied for well in advance of travel departure date, as waiting time for an interview can vary. This contrasts with the trend in those other countries discussed in this section where visa processing is being streamlined and speeded up.

The *Student and Exchange Visitor Programme* is designed to help the Department of Homeland Security and the Department of State better monitor school and exchange programmes. Exchange visitor and student information is maintained in the *Student and Exchange Visitor Information System (SEVIS)*, an internet based system that maintains accurate and current information on non-immigrant students, exchange visits and their dependants. This new system has improved data collection and reporting, and facilitates compliance with regulations. All students and exchange visitors must be registered on SEVIS; as part of the visa process, all applicants must submit a SEVIS-generated form provided by the programme sponsor (in the case of J-1 visas) or educational institution (for F-1 visas). While SEVIS is obviously a repository of data on foreign students studying at school level in the US, it did not prove possible during this project to access any SEVIS data.

One development, which could have an impact on the relative attractiveness of the US as a study destination, is the move in the US Senate to shift responsibility for the federal government's role in market strategy to attract international students from the Department of Education to the Department of State. This change would have a bearing on the visa process. As with other English-speaking countries, the US can scarcely be regarded as a source country for Australia, although it was suggested that there could be niche markets, such as schools with equestrian or golfing programmes, worth exploring.

As a competitor, schooling in the US may not appear to provide serious challenges at the school level, for full fee-paying overseas students. But data on the number of overseas students in public schools could not be accessed, so it has not been possible to establish figures despite various searches. The internal US market in public schools requires more investigation on a state by state basis.

As a market for students to Australia and as a competitor for overseas students, the US is in the ambiguous position of being both immensely strong and in some respects rather weak. It remains a magnet and with policy adjustments, now being discussed at the highest political levels, aims to reverse the downward trend in higher education enrolments by overseas students and to increase study abroad. But as in the UK, the international education policy dialogue seems to be bypassing the schools sector. If there is concern about foreign enrolments in US schools, it is extremely difficult to pinpoint the issues or even to get glimpses of trends in the public sector. For private schooling, the picture is a little clearer and there are (incomplete) figures available, for example, through the National Association of Independent Schools (NAIS). Enrolment in 1,066 NAIS schools and 369 non-NAIS affiliated independent schools (which responded to the survey) for 2004-05 was 12,217 international students. Within NAIS schools, international students represented 1.4 percent of total day school enrolments; and international students represented 11.5 percent of total boarding school enrolments.

The paucity of data reflects the reality, that private schools appear to do very little to recruit international students (except from diplomatic and global company personnel resident in the US) and that if public high schools are in the market, authorities are not readily providing significant data on enrolments of foreign students. So, while the United States has consistently been the leading destination country for international study, this is concentrated in research universities, masters universities, four year colleges, community colleges and a variety of private vocational institutions. Moreover, growth rates appear to be softening so it seems inevitable that any policy initiatives will be focussed on the post-school sector. For example, two key websites for international study - the Institute of International Education and Education USA websites - are entirely devoted to higher education.

A further dimension of American international engagement at the schools level, however, is offshore - the considerable number of *American and International Schools* worldwide in which English is the primary language of instruction. International Schools Services (ISS), an American based non-profit organisation which provides a wide range of services for international schools, indicates that American international schools overseas are typically private, tuition-based schools recruiting on average 50 percent of their staff members from North America. The greatest number are private non-profit elementary and secondary schools with a multinational enrolment, serving international business families, the diplomatic community and the host national community. They generally offer either an American or a British curriculum, with some also offering the IB. In some parts of the world, notably Central and South America, private non-profit independent schools enrol a high percentage of host country nationals. These schools also tend to offer the local national curriculum in some form, often integrated with the international curricula offered. The 2005-06 edition of *The ISS Directory of International Schools* has some 500 listings from over 150 countries. These schools do, in some senses, constitute competition for international fee-paying students. English is taught extensively and may be the language of instruction throughout, students can be daily commuters, and costs are lower.

For the schools sector, there are four key points in comparison with Australia:

- first, it is not a specific school curriculum or physical presence in classroom that constitute requirements for overseas students seeking entry to higher or further education, but that classic educational screening device, the public examination (SAT);
- second, the strong offshore presence through American international schools;
- third, American higher and further education is richly diverse: somewhere there is a place for anyone seeking further study opportunity; and

- fourth, while there is a large and diverse array of cultural and educational exchange activities and agencies, there is little interest in substantial periods of study abroad by high school students. There are opportunities to increase bi-lateral relations at the school level, but they need to be seen in the context of study tours, student and teacher exchanges and sister school relations.

3.1.4 Canada

Canada has virtually no national level education presence and is the only country within the OECD not to have a national department of education. The Constitution vests responsibility for education in the provinces. School education consists of 10 provincial and three territorial systems, including public schools, 'separate' (ie. denominational) schools, and private schools. The provincial systems, while similar, reflect distinctive histories and cultures, most conspicuously in the French-speaking province of Quebec. Provincial departments of education set standards, develop curricula and provide grants to educational institutions, while administration of elementary and secondary schools is delegated to locally elected school boards or commissions. The boards set budgets, hire and negotiate with teachers, and shape school curricula within provincial guidelines. In some provinces both K to 12 and Post Secondary are within the same Ministry, but there is an increasing trend for the ministries to be separated. In most provinces, individual schools now set, conduct and mark their own examinations. In some provinces, however, students must pass a graduation examination in certain key subjects in order to proceed to post-secondary study. Thus university entrance depends on course selection and marks in high school; requirements vary from province to province.

While Canada has an attraction for foreign students seeking English language education, it offers also a francophone dimension, notably (but not exclusively) in the province of Quebec⁵. Functional bilingualism and acceptance of cultural diversity have a long history in Canadian national policy, dating from the Official Languages Act, 1969, in the wake of the report of the Royal Commission on Bilingualism and Biculturalism. At this period, educational authorities in all nine Anglophone provinces reformed regulations concerning French minority education and moved to improve the teaching of French as a second language, with financial assistance from the federal government. In 1971 Canada became the first country to adopt an official multiculturalism policy, cemented by the Canadian Multiculturalism Act, 1988, which affirmed the federal government policy 'to foster the recognition and appreciation of the diverse cultures of Canadian society and promote the reflection and the evolving expressions of those cultures'. Thus Canada is a bilingual country, with a very diverse ethnic mix in addition to its longstanding Anglophone and francophone communities.

The *Council of Ministers of Education Canada (CMEC)*, somewhat similar to MCEETYA in that it is an intergovernmental body composed of the ministers responsible for elementary and advanced education from the provinces and territories, has given support to International Education Week which took place for the first time in Canada in 2004. By contrast with DEST responsibilities, CMEC arranges Canadian educational representation in intergovernmental fora such as OECD and UNESCO.

Given the limited federal powers in education and the concentration of activity at provincial level, there are few if any lessons to be taken from Canada on federal government initiatives in schooling. National level non-government organisations, however, are a different matter.

The *Canadian Bureau for International Education (CBIE)*, founded in 1966 with antecedents dating to the 1940s, is a national organisation exclusively dedicated to international education. An umbrella non-governmental organisation comprised of 200 colleges, universities, schools, school boards, educational organisations and businesses across Canada, it engages at the national level in policy development, research, advocacy and public information.

⁵ For example, the province of New Brunswick is officially bilingual and offers French language education from K to 12 to community college and university level.

CBIE plays an important role in building up a constituency for international education within Canada, holding both national and regional conferences annually, and supporting professional interest groups among members on topics such as: international mobility; internationalisation; student advisers; and admissions, recruitment and marketing. Amongst its publications is *The International Student Handbook 2005*.

The *Canadian Education Centre Network (CECN)*, is a private, independent non-profit company governed by a six-member board, to promote and market Canada as a destination for international students and to support Canada's foreign policy and development assistance objectives worldwide. CECN operates 21 offshore centres in 17 countries, and three in-Canada offices. Its website (<http://www.studyincanada.ca>) provides access to information on all international education sectors, including direct links to both school district and individual private school websites, and comprehensive information about studying in Canada. CECN organises international fairs and events in source countries. Until 31 March 2005, both CIDA (Canadian International Development Assistance) and DFAIT (Department of Foreign Affairs and International Trade) contributed to CECN, with the balance of its funds coming from education fairs, client service fees, corporate sponsorships and fee for service. Core funding support from the federal government has now ceased. While there are no Australian equivalents to CBIE and CECN, there are parallels in some of the activities of AEI, State and Territory education departments and IDP Australia.

International education programmes exist in each of Canada's provinces, taking various forms: in-house international education programmes for Canadian students; second language training (usually English) for international students; study abroad for Canadian students; study in Canada for international students; and sister school agreements and various programmes aimed at both Canadian and international students.

Turning to *international students studying in Canada* at school level, in 2005, 32,151 foreign students were studying at primary/secondary level, comprising 20 percent of all foreign students in Canada. Foreign students at school level have increased from 19,693 in 1995 to 27,501 in 2000, peaking in 2004 at 32,456, and 14,891 studied in Canada for the first time in 2005⁶, comprising 26 percent of new students in this year.

There was a change in 2002 whereby students are now recorded in Citizenship and Immigration Canada (CIC) statistics. Under the Immigration and Refugee Protection Act (IRPA) enacted in June 2002, students registered in courses of six months or less no longer require a study permit (previously it had been three months or less), and so are not recorded in CIC statistics.

More detailed data on foreign students at school level for the year 2001-02 are available in a recent report from CBIE (Savage, 2005), but there is a considerable discrepancy between the total number of foreign school students identified in this report (38,086 for 2001-02) and those recorded in CIC statistics (30,990 for 1 December 2001). Lacking further information concerning this discrepancy, data from the Savage study are discussed below in terms of proportions, rather than absolute numbers.

While international students enrol across the country, the leading provinces in elementary and secondary enrolments in 2001-02 were: Ontario (47 percent of school level enrolments), British Columbia (26%), Alberta (10%), and Quebec (9%). Striking regional differences are shown in the balance of international student enrolments as between school (elementary/ secondary) and university levels in 2001-02.

⁶ Citizenship and Immigration Canada (CIC) distinguishes: 'foreign student stocks' which measure the number of people present in the CIC system on 1 December in each year of observation (comparable to 'enrolments' in AEI statistics); and 'foreign student flows' based on the initial entry method, the number of people identified as entering the CIC system for the first time during a given calendar year (comparable to 'commencements' in AEI statistics).

In the Atlantic provinces, school level enrolments stood at about 25 percent of university enrolments, and in Quebec, at about 20 percent. In Ontario, by contrast, enrolments in the school sector were slightly higher than in the university sector. In the Prairies, school enrolments for 2001-02 were about 75 percent of university enrolments; but in British Columbia school enrolments were almost double university enrolments of international students. This very variable pattern across the country underlines the decentralised nature of Canadian education, and the different priorities and policies obtaining amongst the myriad players.

The top three source regions for international school students, viewed nationally, for 2001-02 were: Asia (50%), North Central America (18%), and Europe (17%). The top source countries for the sector were: Korea (17%), USA (12%), China (6%), Japan (5%), Hong Kong (5%), UK (4%), Mexico (4%) and Germany (3%).

No national level information could be sourced on the proportion of international students in government and in private institutions, on the grade levels at which they studied, or for how long they studied in Canada. Anecdotal information and selected examples are drawn on to illustrate the range of ways in which Canadian institutions have engaged in international education.

There appear to be no legislative restrictions on international students enrolling in government schools, although, as in other countries, they must pay tuition costs. The federal government, through Citizenship and Immigration Canada, regulates entry. For programmes of study six months or less, a study permit is not needed. Students enrolling in longer programmes must have a letter confirming acceptance by an educational institution before applying for a study permit, and provide proof of identity and financial support. For students studying in Quebec institutions for a period of longer than six months, a *Certificat d'acceptation du Quebec* is required before requesting a Canadian study permit. Once a study permit application is approved, on entry to Canada a multiple entry Temporary Resident Visa is issued, if necessary, at the same time as a Study Permit and for no additional charge.

Minor children studying in Canada need a custodian to act in place of a parent. Each province and territory decides the age of majority – in six it is 18, in seven 19. Citizenship and Immigration Canada will issue a study permit for up to four years for students in the K to 12 system. However, the schools themselves often prefer that it be issued for only one year and that extensions take place from within Canada.

Students coming to government schools apply to a school district. Some school districts offer comprehensive and well structured international programmes, presented on user friendly websites. The International Student Programme at Richmond School District in British Columbia, for example, allows overseas students to enter Grades 8 through 12 at selected secondary schools, by paying fees to cover the cost of education. There are two entry points during any school year, at the beginning of each semester. Fees per semester are C\$5,350 with a \$400 compulsory medical charge. Accredited homestay and guardianship support are available on request, with costs ranging from C\$735 to \$900 per month. All schools taking part in the International Student Programme have advisors, administrators, and counsellors to help students with both academic and non-academic matters. Short term study programmes are available for individuals and for small groups. For large groups of 25 students or more, the District will organise a customised programme. Intensive teacher and administrator training programmes are offered which use classroom, community and school observation/practice to facilitate an understanding of Western teaching methodologies and culture. Developing higher level English skills with a particular focus on speaking and listening is also presented as a strong component of this programme. A spokesman for the District said that while most of the international students aim to complete Canadian high school graduation requirements at their schools with a view to continuing to higher education, others come 'just for a Canadian cultural and language experience and study for an academic year, a semester, or in a short-term programme'. Many schools have reported a marked rise in enrolments from younger international students. An increase in younger students coming in recent years has been noted by Richmond and other school districts.

A considerable number of schools across the country offer the International Baccalaureate, notably the Lester B. Pearson College of the Pacific in Victoria, British Columbia, established in 1974 as one of the United World Colleges which together have played a major role in helping develop the IB.

In some provinces, study for the Canadian high school diploma involves different types of programmes depending on students' subsequent pathways. In Ontario, University Preparation is one of five types of programme which domestic and international students alike can study at Grades 11 and 12 level. Columbia International College in Hamilton Ontario, which advertises itself as the largest private international university preparation school in Canada with some 1,500 international students from 48 countries, offers a range of Pre-University courses focussed on requirements for admission to a number of different post-secondary level programmes. For university-bound students, at least six Grade 12 University Level Credits are required in their Ontario Secondary School Diploma. Students whose first language is not English also require a sufficient score on English tests as prescribed by particular universities. The College has formed partnerships with universities in Canada, US, Australia and the UK, and offers designated university entrance scholarships for outstanding graduates.

Fast Track pre-university programmes are offered both within Canada and offshore. In Alberta, the Golden Hills School Division offers Fast Track programmes for meeting admission requirements for entry to technical school, college or university. The university Fast Track programme is open to students who have completed Grade 12 in their home country; over one semester students select five Grade 12 courses relevant to their subsequent pathway; the sixth credit course can be undertaken over the summer semester along with an ESL programme.

Taylor's College Malaysia, which pioneered the International Canadian Pre-U in Malaysia, offers a Fast Track Pre-U for students with good Form 5 school/ trial results. Using the Ontario curriculum, this is a specially tailored Grade 12 programme beginning in January/February and ending six to seven months later, in time for admission to a Canadian university in September the same year.

Ryerson University in Toronto offers a Pre-University Studies Option designed for prospective international students to complete or upgrade secondary school admission requirements (grade 12 equivalents) for entry to Ryerson degree programmes. This programme comprises academic and English language upgrading programmes.

Although it has not been possible within the constraints of this study to gauge the scale of activity, Canadian institutions are indeed active offshore. In 2004, for example, Prince Edward Island Department of Education and CAN_ACHIEVE Educational Consultants Ltd established the PEI-CHINA Public High School Programme under which a university preparatory curriculum designed to Canadian public school standards for senior high school grades 10 to 12 will be taught in selected Chinese schools in English by PEI-certified Canadian teachers. Graduates will receive dual graduation diplomas (a PEI public high school diploma as well as the local Chinese senior school diploma). A similar programme operates in Japan; another is being established in Egypt. Canada's outreach is increasingly global.

The Ontario Ministry of Education has developed agreements with 29 overseas secondary schools to provide an annual inspection of their standard of instruction. A satisfactory inspection report authorises the school principal to grant credits towards the Ontario Secondary School Diploma. These are not, however Ministry schools; the Ministry has no involvement in employing teachers for the school, or for matters relating to the health, safety or supervision of the students. Although Ontario is approached regularly to allow their curriculum to be used offshore, there is currently a Ministry moratorium on expansion. Other Canadian provinces are also approached regularly to have their curricula used internationally.

Canada's approach to the international student market offers many similarities to Australia's with two significant differences in the absence of a strong federal structure for education, and the roles performed by NGOs and private enterprises (other than independent schools). Comparisons are most pertinent at the state/ province level as is also the case with the USA – Australia comparisons.

Canada's very strong international image as an internationally-minded country with a long tradition of development aid, collaboration in international programmes, peace keeping and conflict brokering is an asset which has value in promoting Canadian life and education. Its geographical location vis-à-vis the USA, signatory to the North American Free Trade Agreement, and very well developed links (in the western provinces) with Asia, and (in Quebec) with France and longstanding aid and development links with Latin America give it a well balanced profile. Although these advantages appear not to have been fully exploited at the school level, interest in Canada in international education is growing and this includes closer attention being given to Australian policies and practices as well as other competitor (and source) countries. It could be advantageous to Australia to take a closer interest in Canadian developments and to explore possibilities for joint activities.

3.1.5 New Zealand

New Zealand's performance in attracting international fee paying students suffered a setback in 2003 due in part to adverse publicity over language school practices. What is noteworthy, however, is not the decline but the very determined response – to regain market share and to focus on developing competitive advantage in segments of the market. An illustration is the belief that in attracting primary school students, mainly from Korea, New Zealand can compete very effectively with Australia. Although education is the responsibility of a single central government, government schools have a high degree of self determination. This structure, together with the size of the country's population, facilitates ease of connection between individual schools and national authorities. Education New Zealand, a national body representing the industry, works closely with central government. In these circumstances, policy coherence is relatively easy to achieve.

By contrast with Australia, in New Zealand most foreign fee-paying students at school level are enrolled in government schools – there is a very small non-government sector. School level enrolments have grown from 5,465 equivalent full-time students in 1997 to 15,903 in 2005, with dips in 1998 and 2004. According to Education New Zealand data, in July 2004, some 445 primary schools and 326 secondary schools were hosting foreign fee paying students (an average of 21 students per institution); average tuition fees being NZ\$ 7,813 for primary, and NZ \$10,314 for secondary level students. Schools represent 16 percent of the overall international education market – a significantly higher proportion than in Australia. Recent changes by the NZ Qualifications Authority to a standards-based senior school qualification, National Certificate of Educational Achievement (NCEA), and implications for university entrance have created some uncertainties within the NZ community over quality, but this is likely to be of passing concern rather than a long term challenge to attracting international students focussed on pathways to higher education study⁷.

Education is the fifth largest export industry for New Zealand. Given the fluctuating economic performance of the NZ economy over the past 20 years, international schooling has an important role in overall government policy.

⁷ NCEA level 3 is seen as comparable with Australian Year 12 certificates, with the US high school diplomas plus SAT and UK GCE-Advanced levels as a gateway to university.

New Zealand government schools are governed by locally elected Boards of Trustees. Thus decisions about enrolling foreign students are taken at school level, and cannot be subject to the national level authorities providing they are not losing money on investing overseas. The majority of secondary schools are already engaged in the foreign student market. As in Australia, the home market thus comprises a large number of small players. Schools retain 100 percent of fees, minus the industry levy of \$900 per student, and this funding arrangement serves as a valued incentive.

The *NZ Ministry of Education* has considerably strengthened its International Division over the past three to four years and has established a network of overseas counsellors (currently four, with three more under consideration) whose responsibilities are to build long term bilateral educational relationships (they do not have a marketing brief).

Strong Ministerial backing for international education saw the launch in 2004 of the *International Education Framework* – an ambitious initiative to win back market share after foreign fee paying student enrolments as a whole peaked in 2003, declining significantly in 2004. In the five years to the end of 2008-09, government international education funding will be focussed in five areas: education diplomacy (\$15.3 million); building quality (\$33.8 million); developing and maintaining worldwide study links (\$13.9 million); innovation in international education provision (\$4 million); and strategic promotion and marketing (\$3.2 million), a total of \$70.2 million. (All figures are in NZ currency). The Government's strategic approach focuses on:

- enhancing quality to strengthen NZ's reputation as a provider of choice for education services;
- increasing diversity of international education activities, and the widening range of countries of origin for onshore and offshore students;
- increasing the skill component of international education;
- developing international education partnerships to sustain long-term relationships with key countries, regions and international organisations; and
- strengthening public support in New Zealand to ensure the social, cultural and economic benefits of international education are fully realised.

This strategy framework corresponds closely to approaches being taken in Australia. Funds from the compulsory export education level, approved by parliament in 2002, are ring-fenced to ensure strategic development work in international education is securely resourced.

Marketing international education is the focus of *Education New Zealand*, an industry owned peak body (excepting the English language sector) which is contracted by the Government to administer the export education levy and which retains 0.45 percent of levy revenue to support its operations. Education New Zealand is a non-profit charitable trust with a Board of Directors comprising members of the education sector peak bodies covering state and private secondary and tertiary providers. According to its chief executive it is a body with a structure akin to IDP and functions to AEI. Education New Zealand runs professional development for the industry, conducts generic marketing (using the 'New Zealand Educated' brand). It does not have its own staff overseas, but purchases services when needed for event management. In the past it has worked with NZ Trade and Enterprise, but is now becoming more selective about arrangements for each market. Education New Zealand takes a close interest in Australian developments.

In population terms, New Zealand education is on the scale of NSW or Victoria, but it has the apparatus of national government to draw on in international work. There is a sharp edge to policy, streamlining of structures and procedures, and links direct to schools together with a level of engagement, and of entrepreneurship by a high proportion of schools. This is a policy and operational environment which NZ authorities regard as conferring competitive advantages in marketing New Zealand education internationally. There is also confidence that with the boost to investment and the clearly defined strategic goals, a renewal of growth will occur in the years ahead. Even if the overall the international school student market were not to grow, the New Zealand determination is to ensure that its share does.

3.2. New Destination Countries – Education Hubs in Asia

3.2.1 *Emerging education hubs*

In recent years several Asian countries have sought to build and promote themselves as international education hubs. Policies have two major prongs: first, to arrest the export of their own students; and second, to attract foreign students. It is too early to judge the longer term effectiveness of these policies, but over the short term, Australia (and other countries) has noticed a drop in the number of nationals from these countries commencing studies in their schools. The precise reasons for this drop, however, require more detailed analysis to test the commonly offered explanations.

The key policy strategies in building international education hubs are:

- a) *Curriculum change within national school systems:*
 - i) improving English language teaching for domestic students (bringing in more native English speaking teachers (Korea); beginning teaching English as a foreign language at an earlier age (Year 3, Korea); teaching a greater number of subjects in English (maths and science at secondary level now taught in English, Malaysia);
 - ii) moving towards more flexible teaching styles, problem solving; and
 - iii) continuing to maintain and/or strengthen competitive performance in international tests of student achievement, ranking of institutions, etc.
- b) *Developing and improving facilities for international students:*
 - i) increasing the number of domestic international schools (Singapore, Malaysia, Korea, Thailand – some of which offer cheaper fee structures than Australia, and lower travel expenses and cost of living for Asian students);
 - ii) opening enrolment in international schools to domestic students (in Singapore, Korea, and Thailand – in some schools up to 50 percent. This makes for cost efficiencies and arrests exports);
 - iii) developing a quality assurance framework for international students (Singapore, based on Australian models); and
 - iv) providing national support for promotion and recruitment drives (Singapore, whole of government approach; the Economic Development Board is the lead agency, with the support of Tourism Singapore).

3.2.2 *Singapore*

Singapore has some 38 international schools. Most teach in English and many follow national education systems of other countries. In 2003 nearly 20,000 students attended these schools (Singapore Education 2004). While originally set up to educate children of foreign professionals working in Singapore, many now enrol students from all nationalities and backgrounds. The Australian International School, with close to 1,100 students (P to 12) and offering the NSW curriculum, is in this category. Singapore nationals are not at present allowed to enrol in these international schools, apart from exceptional cases.

A further category of private academic schools (classified as private education organisations) can offer foreign curricula to both domestic and foreign students. One of the two private academic schools is St Francis Methodist School enrolling some 600 students and offering the AUSMAT in Years 11 and 12.

Until 10 years ago only a few foreign students (mainly Malaysians and Indonesians) studied in Singapore's *Ministry of Education (MoE)* schools, and individual schools may today still have only five to 10 foreign students. MoE schools, which cater for Singapore nationals, are taught in English medium, with obligatory mother tongue courses (Mandarin, Malay or Tamil) during the years of compulsory schooling. For entry to university in Singapore, a pass in the mother tongue component at 'O' level is required. Curriculum reforms currently under way in MoE schools are intended to make schooling more flexible, but these are still at an early stage.

In 2002 the *Economic Development Board* developed its Global Schoolhouse initiative, slating education as a growth sector, to increase from 3 to 5 percent of the economy and driven by the international sector. While EDB has not set a target for school level international enrolments, it has established an overall goal of 150,000 international students studying in Singapore at all levels by 2015, more than doubling the 2005 total of 70,000, itself a significant growth from the 2004 total of 66,000. These developments at school level contribute to a broader aim of building Singapore as an educational and R&D hub in Asia, to attract foreign talent and facilitate citizenship for skilled persons.

As Singapore currently lacks skilled manpower, and an internationally significant research base, it is following an approach of simultaneously importing talent, and building up domestic capacity through inviting 16 leading foreign universities to establish bases in Singapore (including UNSW the only foreign university to establish at both undergraduate and graduate level). Establishing a significant international student body at the secondary school level will increase the pool of students for these new institutions. For EDB, supporting international education is part of its overall strategy of diversification of the Singapore economy.

While much of EDB's push for educational growth is focussed on the tertiary sector, initiatives at school level are included. Recently, EDB (rather than the Ministry of Education) licensed two new types of international school on an experimental basis, allowing them to enrol (ultimately) 50 percent foreign and 50 percent Singaporean students on a fee paying basis, giving the schools curriculum freedom (ie. they are not subject to MoE requirements), although with certain provisos for Singaporean students including to satisfy mother tongue requirements during the compulsory years. The two schools are: Hwa Chong International School and the Anglo Chinese International School. The latter opened in January 2005 as a six year secondary school with 120 students. By January 2006 student numbers had grown to 400 students (with a waiting list), of whom 65 percent are Singaporeans. The school's principal projects its ultimate size on the existing campus as 750, although the school board apparently would like it to be more. The school sees its appeal to local parents as: international atmosphere; wider curriculum; smaller class size; fees set at realistic level (Singapore \$15,000 to \$18,000 senior years (same for local and overseas students); and boarding hostel fees in the range S\$4 to 5,000). Students are currently from at least 12 foreign countries, mainly SE Asian nationalities. The school has been invited by the Singapore Tourist Board on promotional education tours to other Asian destinations. Hwa Chong International recently organised a student study tour to Australia, visiting five universities.

Two more international schools will open in 2006 on the privately funded school model. These developments indicate the robust demand for international school education in Singapore, both from the international community and – when enabled – from local residents. Whether this will significantly affect demand from Singapore students for schooling in Australia is unknown, as the most significant motivations for study in Australia according to education agents in Singapore, are from ethnic Chinese students whose command of Mandarin is weak, from students who find the Singapore education rigid and stressful, and from those whose families have long term view of permanent residence in Australia. While these new developments will add greater educational diversity to options for Singapore families within Singapore, there is currently no likelihood that the mother tongue requirements will be dropped. The motives for overseas study by Singapore students are not unfavourable to the Australian market. More important is the scale of international schooling within Singapore and the drive to recruit students from across Asia.

Singapore has a declining birth rate, and therefore a drop in school age enrolments. As a consequence there are disused government school buildings. Alternative uses for them include establishing new schools for the international market. The Anglo Chinese International School has a 15 year lease on a disused former government school, and has invested significantly in renovating the property prior to classes opening. As the Anglo Chinese International School is part of the Singapore-based Anglo Chinese School group (of six schools) dating back some 120 years, it has access to considerable resources (and presumably lines of credit) for expansion. As with AC International, Hwa Chong International, which also opened in 2005, is the newest venture for a cluster of schools and colleges (the Hwa Chong family). Hwa Chong International was established in a disused school on a temporary basis, and is now putting up permanent buildings including significant boarding facilities.

As a further school level initiative, the EDB has a target of attracting about 10 existing foreign schools to establish branch campuses in Singapore over the next five years. Possibly one or two Australian schools will be included, but none has yet been identified.

In terms of international student markets at the school level, Singapore has targeted specifically Chinese, Indonesian and Indian students, believing the psychology of students not leaving the Asian culture zone to be attractive to parents, while offering quality schooling in English at a competitive price, and in a cosmopolitan environment. Singapore sees (and markets) itself distinctively as a link between east and west and as achieving very high academic standards.

Two further aspects of the Global Schoolhouse initiative, which draw inspiration from developments in Australia, concern student welfare and educational standards. *CaseTrust for Education* certification was launched by the Consumers Association of Singapore (CASE), as a trustmark for private education organisations that it provides good quality student welfare/protection practices and standards. From September 2005, only private educational organisations with CaseTrust for Education status can offer places to international students in their programmes in Singapore. As seen above, there are only two such school level organisations (the private academic schools), but this is a direction which is likely to be noted by other schools.

In addition to the CaseTrust for Education scheme, private education organisations are also encouraged to attain the *Singapore Quality Class (SQC)* trustmark, which is judged according to an institution's performance in relation to areas such as organisation leadership, people management, and business processes. In addition, there are mandatory requirements such as ensuring education courses are registered and accredited with appropriate bodies, and adequate student services are provided.

The longer term impact of these new developments on student numbers studying in Australia is as yet unclear. Because there are relatively small numbers of Singaporean students who study in Australia, the changes outlined may not lead to a significant change, as the key reasons cited for study in Australia were: difficulties with Singapore education mother tongue requirements⁸; family interest in permanent residence for their children. With the continued planned growth of international schools in Singapore, should they draw significant numbers of students from other Asian countries, there could be an impact on numbers coming to Australia, particularly where price sensitivity is an issue. Closer investigation is needed of the capacity for expansion and the relative importance of inward flows of international students in overall education (and economic) priorities. While it is not possible to disentangle the cost structure of the international schools, there appear to be quite substantial public subsidies acting as incentives to growth.

⁸ A key difficulty encountered by some ethnic Chinese children is meeting the Mandarin mother tongue requirements at O level, without which students are not eligible to enter Singapore universities. This difficulty, cited by several interviewees, arises because there are ethnic Chinese children who speak a dialect at home, and English at school and in the community. There is no suggestion at present of the mother tongue requirement being relaxed.

Singapore is noted for launching bold strategies to leap frog competition. There may be potential for Australia to work in with these initiatives notably in offshore activities, but definite efforts to develop partnerships and joint ventures would be required. This happens already in the business community, but is recognised to involve careful and often protracted negotiations. There is in Singapore a degree of confidence about the quality of its education and of recent policy initiatives, combined with a highly competitive outlook.

3.2.3 *Malaysia*

Two types of foreign school systems operate in Malaysia: international schools; and expatriate schools (a small number of schools for specific expatriate communities, taught in languages other than English). International schools are privately funded fee paying institutions, which offer foreign curriculum in English medium, preparing students for external internationally recognised examinations. Malaysian authorities accept the British system, the American system and the Australian system. International schools are not governed by the Education Act 1996, but are subject to supervision by the Ministry of Education through its Department of Private Education. These schools largely cater for the expatriate community, but also attract international students to study in Malaysia. They are not intended for Malaysian students of compulsory school age, unless approval is granted by the Ministry of Education, or students are enrolled under certain conditions at preschool stage (see below).

During the compulsory school years, enrolment by Malaysian nationals in international schools is allowed only where the student has lived overseas for more than three years or if one parent is a non national. Malaysian students are able to enrol in international schools to study senior secondary programmes following end of compulsory schooling; also, students are permitted to enrol directly at age three in pre-school at the international school, and therefore are not transferring from another school.

Student enrolment in December 2004 in international schools for foreign citizens (primary and secondary – 30 schools) was 9,638. According to the MoE, this comprised 8,055 foreign students with the balance Malaysians. In expatriate schools for foreign citizens (primary and secondary, 15 schools) enrolment was 1,605 (Schools of Malaysia 2006).

The restriction on Malaysian nationals attending international schools is quite contentious, and indeed it is possible that this will change in order for Malaysia to stay competitive with Thailand⁹ and Singapore. A domestic issue for Malaysian politicians is how to maintain an ethnic balance among Malaysians were the ban to be lifted, given that the Chinese community is by and large in a better position to afford the fees of international schools than are the Indian and Malay communities. For foreign schools looking to set up in Malaysia, the prospect of local enrolments is of considerable interest, financially.

Like Singapore, Malaysia has a policy of establishing itself as a centre of educational excellence, and attracting fee-paying international students other than expatriates. Malaysia wishes to attract a prestigious private school to establish a campus in the Kuala Lumpur area, but negotiations have yet to be concluded.

Islamic schools (which use both national and Islamic curricula) are seen as a potential way of drawing in foreign students from Brunei and southern Thailand and presumably Indonesia. Currently Malaysia has 20 Islamic primary and 16 secondary schools, and one international Islamic school.

⁹ Where there are some 75 international schools to which domestic students have access. Over the past five years the Thai Government has been encouraging the establishment of private schools, and the use of overseas teachers to teach English in public and private schools. Both US and UK 'prestige' schools (eg, Harrow International School) have established campuses in Bangkok.

Since independence from Britain when the then new national government changed the medium of instruction in national secondary schools from English to Malay, there has been an interest particularly among the Chinese community in providing their children with English medium education. This has been the core of the current Australian onshore market for schools. Four years ago, the MoE introduced English as the medium of instruction in the national secondary school curriculum for science, mathematics and IT, arguing that since English is the dominant global lingua franca, knowledge of these two areas in English would enhance Malaysians' competitive position.

Further curriculum changes under way within the MoE are designed to make studying more pleasurable, and move study away from a narrow examination orientation.

Currently, primary schooling is available in community languages (Malay, Mandarin, Tamil), but secondary schooling is in Malay medium apart from science and maths, now taught in English. At certain categories of secondary schools, additional classes in, for example Mandarin are offered. After the SPM (O level) at the end of Form 5, students have tended to follow a variety of directions, with only a relatively small number remaining at school for the Sixth Form to sit the STPM (A level), a course which is undertaken in Malay medium except for those subjects taught in English. Students intending to study at (highly competitive) Malaysian public universities (predominantly Bumiputra students) stay for the STPM.

A considerable array of alternative matriculation options exist within Malaysia for students with 'O' levels. Besides travel overseas for senior secondary studies, private colleges offer single year matriculation courses based on British, Australian and Canadian curricula, the American SAT test, and a range of university foundation courses. While these courses provide students with entry to universities overseas, increasingly higher education institutions are offering foreign tertiary level study within Malaysia, in a variety of flexible formats (for example, one, two or three years in Malaysia, followed by two, one or no years in the institution's country of origin.) Taylor's College Malaysia, an institution in origin Australian, exemplifies these matriculation colleges. It offers the full range of the programmes listed above, and is the largest offshore centre for the South Australian Matriculation (SAM).

Why would families send their children to study in Australia at school level? In the view of an experienced education agent, there are two main types of reason:

1. families which want an alternative to the local school for their child (these tend to be well to do families, often with a family history of attending Australian schools and also interested in permanent residence for their child); and
2. dissatisfaction with some aspect of local schooling – such as a child having difficulties studying in Malaysia (low score in Malay language, large classes, discipline problems) – so parents feel it is better for the child to study in Australia.

An Australian education is seen to produce students who are confident, articulate, and who interact well in social situations; have good academic results because of tutorial support; and gain access to university. Australian educated Malaysians are seen to show considerable maturity, independent thinking, and social engagement. Whether the changes currently under way in Malaysia will lead in time to lower demand for foreign education both within Malaysia and overseas, it is too early to say.

Given the structures of schooling in Malaysia, the specific national language requirements, the interest of many parents in English language immersion and the advantages Australia is seen to offer, there is scope in the foreseeable future for a continued focus on the Malaysian market. The development of partnership arrangements and offshore delivery of Australian curricula and examinations should be seen as growth areas. Malaysian authorities expect a better balance of trade, with more interest shown by Australian schools and educators in Malaysia as a partner not simply a supply source. This calls for attention by Australian schools and education authorities.

3.3. Lessons from Other Countries' Experiences and Expectations

Australia compares favourably overall with its English language competitors in the international fee paying school market. In its legislation, regulatory and quality structures, marketing and provision of a well regarded educational and cultural experience it performs very well. Great success has been achieved in developing a strong market position in a relatively short space of time. Other elements of a broad international education profile are quite difficult to compare due to data issues but there is a perception that Australia has given undue emphasis to selling services rather than developing a two way flow. Competitor and source countries provide a number of challenges to current Australian policy and practice and they have considerable interest in following developments here. Market conditions for recruiting fee paying students are changing, but they need not be regarded as unfavourable provided there is a readiness to address emerging new opportunities, especially through offshore provision and partnerships. Continuing to learn from the experience of others, weighing their potential and attending to their expectations are part of the national intelligence service which AEI can provide to the Australian education industry. The network of counsellors is key in this process, as are the onshore data and policy analysts.

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APPENDIX 2: OFFSHORE MEETINGS SCHEDULE

12 December 2005 – Wellington, New Zealand

- 0915 Paul Lister, Manager (Policy), International Division, NZ Ministry of Education. Phone: 04 463 8705 (DD1).
- 1100 Rob Stevens, Chief Executive Officer, Education New Zealand, 114 The Terrace, Wellington. Phone: +64 4 4720788

Monday, 16 January, 2006 – Singapore

- 0930 Australian Education International. Mr Suhaimy Hassan, Director. Australian High Commission, 25 Napier Road Singapore 258507. Phone: +65 6836 4235
- 1100 Advanced Studies Advisors, Mr Alex Lee, Director. 9 Penang Rd, # 10-16 Park Mall, Singapore 238459. Phone: +65 6339 6692. (education agent)
- 1400 Mrs Perlicia Jiang, parent.

Tuesday, 17 January – Singapore

- 0900 Economic Development Board. Mr Mervyn Tan, Senior Officer, Education. HQ Education, Environment and Professional Services Cluster. 250 North Bridge Road # 28-00 Raffles City Tower, Singapore 179101. Phone: +65 6832 6446.
- 1100 Anglo Chinese International School. Rev Dr John Barrett, Principal. Mr Joseph Ng Han Yee, Assoc Director Business Development. 61 Jalan Hitam Manis, Singapore 278475.
- 1500 Aus-Ed/Uni-Ed. Mr Kelvin Mok, Marketing Manager/ Education Counsellor; Mr Ferdinand Tan, Office Manager/Education Counsellor. 7 Maxwell Road, Annex B MND Complex # 04-09, Singapore 069111. Phone: +65 6227 0380. (education agent)

Wednesday, 18 January – Kuala Lumpur

- 0830 Australian Education International. Mr Matthew Evans, Counsellor; Mr Gavin Gomez, Deputy Director. 6 Jalan Yap Kwan Seng, 50450 Kuala Lumpur. Phone: +60 3 2146 5604
- 1000 Ministry of Education Malaysia. Mr Kenneth J. Luis, Under Secretary; Ms Ang Li Ling, Assistant Secretary. International Relations Division. Level 7 Block E8, Kompleks Kerajaan Parcel E, Pusat Pentadbiran Kerajaan Persekutuan, 62604, Putrajaya. Phone: +603 8884 6110.
- 1300 ET Educational Service. Mr E.T. Gan, Managing Director; Mr Matthew Gan, Director. (meeting held at Australian High Commission) Phone: 03 7876 9782 / 016 280 6912

Thursday, 19 January – Kuala Lumpur

- 1000 SMJK Chong Hwa (SMJK – *Sekolah Menengah Jenis Kebangsaan* - National Type Secondary School) Mr Chu Fook Sai, Principal and four senior staff. Jalan Gombak, 5300 Kuala Lumpur.
- 1430 International School of Kuala Lumpur. Ms Naomi Aleman, Curriculum Coordinator. Jalan Kolam Air, 68000 Ampang, Selangor D.E. Phone: 03 4259 5623

Friday, 20 January – Kuala Lumpur

- 0930 Taylor's College. Mrs Anuncia Jeganathan, Principal; Mr Lim Tou Boon, Registrar; Ms Mary Ng, Programme Director, South Australian Matriculation; Ms Chew Soon See, Office Manager, Australian International School Malaysia (part of the Taylor's College group). Meeting held at Taylor's College, No.1 Jalan SS15/8, 47500 Subang Jaya. Phone: +60 3 5636 2641.
- 1400 Study Malaysia. Mr Tan Mui Hong, Editor (meeting held at Australian High Commission) Phone: 03 7880 3887

Monday, 23 January – Seoul

- 0900 Australian Education International, Ms Mary-Jane Liddicoat, Counsellor, and Ms Juhee Hong, Senior Research Officer, 13th Floor, Kyobo Building 1, Chongro-Ku, Seoul, 110-714. Phone: +82 2 2003 0135
- 1000 Ministry of Education and Human Resources Development, Ms Kyeyoung Lee, Director, International Education Co-operation Division; Ms HyeRim Kim, Deputy Director, International Education Co-operation Division; Ms Na Hyun-Ju, Deputy Director, Educational Welfare Policy Division; Ms Lee, Ji-Hyun, Deputy Director, Overseas Korean Education Division. 77-6 Sejong-no, Jongno-gu, Seoul 110-760. Phone: +82 2 2100 6570
- 1130 Korea Institute of Curriculum and Evaluation (KICE). Dr. Chung, Kang-Chung, President; Dr Kun-Nim Lee, Head, Dept of External Relations; Dr Eui-Kap Lee, Researcher. 25-1, Samchung-Dong, Jongno-Gu, Seoul 110-230. Phone: +82 2 3704 3506.
- 1400 Telephone interview – parent. Mr Kim Sung Hun.

Tuesday, 24 January – Seoul

- 1000 National Institute for International Education Development, 181 Dongsung-dong, Jongno-gu. Mr Park, Dong Sun, Director; Mr Byun, Young-Jong, Head, Overseas Study Supporting Team; Ms Jeong, Mi Rye, Co-ordinator, Overseas Study Supporting Team; Mr Kim, Yoon Kyung, Dept of Academic Affairs and Students. 181 Dongsung-Dong, Jongno-Gu, Seoul, 110-810. Phone: +82 2 3668 1374.
- 1130 uhak.com. Ms Julia (Jee-Yoon) Hong, Programme Development, 5th Floor, Gaewon Building, 32-7, Kwanchul-dong, Jongro-gu, Seoul 110-111. (education agent) Phone: +82 2 732 1321.
- 1430 Edunet. Mr Hyun-Sun Park at IAE Edunet, 3rd Floor, Century Tower, 1337-20, Seocho 2-dong, Seocho-gu (education agent).

Wednesday, 25 January – Seoul

- 0815 Seoul Foreign School. Mr. Chuck Krugler, Academic Counsellor. 55 Yonhi-Dong, Sedaemun-ku, Seoul 120-113. Phone: +82 2 330 3312.
- 1030 Kyungin Women's College. Dr Kwak, Byong-Sun, President; Dr Michelle R. Kim, Professor, School of Tourism, Deputy Director, International Cultural Education Centre. 548-4, Gyesan-dong, Gyeyang-gu, Incheon 407-740. Phone: +82 32 540 0101.

Thursday, 26 January – Seoul

- 1400 IDP. Ms Mia Seo, Country Director. Phone interview. Phone: 738 6060. (education agent).
- 1430 Phone interview – parent (arranged by IDP).