



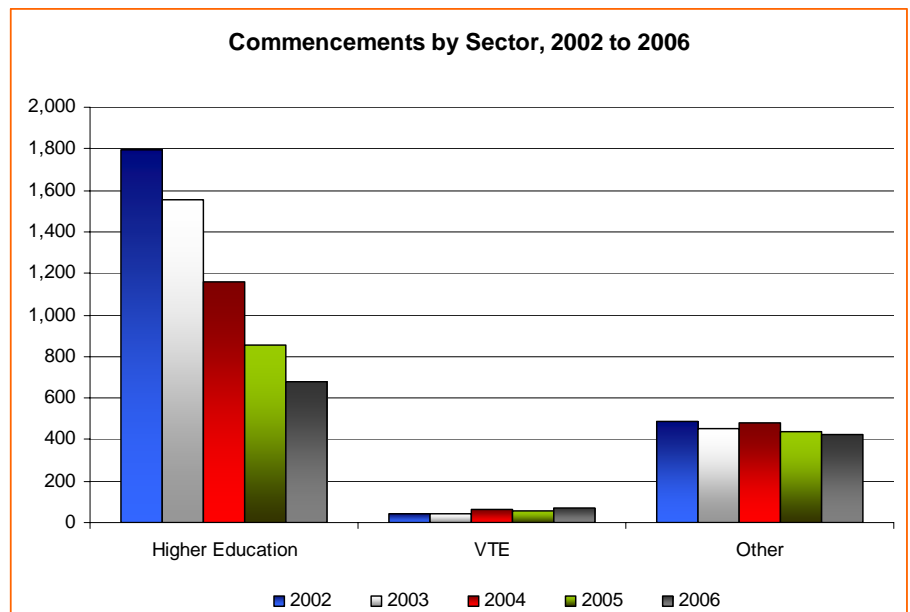
## Norway

Norway is Australia's fourth largest market in Europe although our share of the market has declined over the past few years. In 2006 it dropped to second place behind the United Kingdom as Australia's largest higher education market. Data from the Association of Norwegian Students Abroad (ANSA) show that in 2005-06 there were 2,718 Norwegian students studying in Australia, of whom 2,185 were doing full courses and 533 were doing up to a one year of study. The courses experiencing the most significant decreases were technology/engineering, journalism, health management and art. ANSA reports that the overall number of Norwegian students studying abroad has fallen from a peak of 20,446 (15,207 full degree and 5,239 study abroad) in 2002-03, to 20,008 (12,991 full degree and 7,017 study abroad) in 2005-06.

Australia's major competitors in Norway, the UK and the US, have also experienced declines in enrolments over the past three years. Study in what are perceived to be newer and cheaper English speaking destinations such as South Africa, New Zealand and Canada are attracting more students. Poland has had success in attracting Norwegian students to their medical degrees which are delivered in English. More Norwegians are also studying in the more 'fashionable' destinations of Africa and South America, often enrolling in universities which have exchange or partnership agreements with Norwegian institutions. Norwegian universities are also marketing themselves more actively to their domestic students because the Government funding model is now based on enrolment numbers.

The Norwegian Government provides financial support for students who choose to include study abroad as part of their degree. Changes over recent years to their loan/grant support for students have resulted in a decline in the total number of students going abroad. Previously the Government provided a 100% grant, but this is now a 50% grant plus 50% loan for undergraduates, and a 70% grant plus 30% loan for postgraduates and semester study abroad programmes. The Norwegian Government has expressed a preference for one semester student exchanges rather than whole degree studies overseas. Despite their relative affluence, Norwegian students are price sensitive, particularly since the Government changed the grant/loan system. ANSA has expressed the view that rising tuition fees in Australia have had an impact on students' choices.

The Norwegian Government has claimed that it is not looking to promote or discourage study in specific countries, but there has been subtle encouragement for students to study in non-English speaking countries (Poland, Czech Republic, China), countries with strong trade and business ties with Norway (China, Canada and South Africa) and within Europe.



### Higher Education

- Despite the decline in enrolments in recent years Norway is still Australia's second largest higher education market in Europe.
- Norway is the leading European country for Bachelor degree enrolments (1,443 in 2006).
- Norway is also a key market for Master by Coursework programmes (450 enrolments), which is second to Germany (598).

### Vocational Education and Training (VET)

- Norwegian enrolments in VET (100) are modest compared to higher education.
- The most popular fields of study are Arts, Humanities and Social Sciences (61%) which differ from many other European countries in which business administration and management and services and hospitality and tourism are most popular.
- The most popular level of study is the Certificate IV (41%), followed by the Diploma (34%).

### Other educational sectors

- Norway is the fourth largest source for non-award courses (524), behind Germany (2,161), the UK (662) and France (572).
- The schools market from Norway is negligible (10).