

***Review of the Education Services for
Overseas Students (ESOS) Act 2000***

Interim Report – November 2009

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This Interim Report can be accessed via the Australian Education International website at:

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Foreword

The Deputy Prime Minister and Minister for Education, the Hon Julia Gillard MP asked me to review the *Education Services for Overseas Students Act 2000* and its associated legislation and regulations (referred to collectively as ESOS). The terms of reference for my review are at **Appendix A**.

Australia's international education sector has been a quiet achiever with little recognition within the community of the benefits it brings to our educational institutions and to our multicultural society. Over the last two decades, from when Australia first accepted full fee paying students, it has developed into a successful sector worth \$17.2 billion annually to our economy and contributing to a more vibrant domestic education and training system. It is widely acknowledged that ESOS has contributed to this success by providing world-leading consumer protection for international students and establishing the requirements which education and training providers must meet to deliver courses to international students.

However, rapid and unsustainable growth since the mid-2000s, along with the uncertainties of the global financial situation and recent incidents involving the safety of international students have highlighted areas of weakness which much be addressed if Australia is to remain a world leader in international education. Australia has seen its international reputation and 'brand' damaged, particularly in India, and the skewing of the international education sector from a focus on delivering high quality Australian qualifications to an emphasis on education as a pathway to permanent migration.

This review has identified two essential and complementary elements to contribute to a restoration of the international education sector. The first is the need for ESOS laws, which specify national regulation of international education providers, to deliver more effective consumer protection (including complaints handling and alternative course placement) to support high quality international education. The second essential element is the application of these laws in ways that are transparent, streamlined and risk based for the greatest impact at lowest cost to governments, education providers and international students.

The most significant areas of enhancement required to the ESOS framework are in the area of entry requirements for registration, the responsibility of education providers for the agents who act on their behalf both on- and off-shore, national consumer complaint and support mechanisms, and viable tuition assurance where the costs are borne by providers of highest risk.

In respect of the application and design of these laws, considerable improvements are required to reduce the overlap and confusion of federal and state laws, the quantum of resources applied to compliance and enforcement activity, and ensuring an effective risk approach to regulation in that good education providers are not unnecessarily burdened with regulatory requirements which are targeted at those providers who are not abiding by ESOS.

The work of the review has identified numerous areas of concern which cannot be resolved through either the ESOS framework or its application. Nor will they be entirely resolved by parallel work relating to international students and education quality. This includes the Council of Australian Governments (COAG) national International Student Strategy to improve the experience of international students in Australia; and the establishment of a national Tertiary Quality and Standards Agency (TEQSA) and the development, through COAG, of further reforms to vocational education and training, including models for a national regulatory body.

The review's consultations are identifying transport, housing, health and better practice to include international students both in the academic life of their institution and the broader community in which they live as significant issues. Restoring the balance between education chosen for its quality and future skilled migration options will require major policy changes to be sensitively handled.

More will need to be done by governments, education providers and in local communities to ensure the wellbeing of international students in our communities and the restoration of international education as a high quality education-driven sector which has a sustainable and long term future. The review will make findings in these areas to be addressed by relevant agencies. However, it will be important to ensure that any new regulatory impost and changes in Government policy does not destroy the long term viability of the international education sector.

The Hon Bruce Baird
3 November 2009

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1 Background

1.1 Legislative framework

ESOS governs the provision of education and training services to international students studying in Australia on a student visa.

The principal objectives of ESOS are:

- a) to provide financial and tuition assurance to overseas students for courses for which they have paid
- b) to protect and enhance Australia's reputation for quality education and training services, and
- c) to complement Australia's migration laws by ensuring providers collect and report information relevant to the administration of the law relating to student visas.

The ESOS Act requires registration of all providers and their courses for delivery to international students. In addition to meeting the requirements of the ESOS Act, registration requires that a provider meet the standards set out in the National Code. These standards address: marketing, recruitment and enrolment; student support including orientation, complaints and appeals and transfers; monitoring and reporting relating to educational progress and migration requirements; and administration. Registration under ESOS also requires a recommendation from the relevant state or territory authority confirming the provider meets the relevant quality standards for their education sector.

ESOS is administered by the Department of Education, Employment and Workplace Relations (DEEWR) in cooperation with state and territory registration bodies. The respective agency responsibilities are detailed in a Shared Responsibility Framework agreed by Australian education departments in 2007.

ESOS helps protect the integrity of the student visa system. It aims to ensure that study is the main purpose of a student's stay in Australia by stipulating course attendance, progress and completion requirements, and by requiring providers to report certain information to the Australian Government to support the administration of the student visa program.

1.2 Australia's international education sector

Between the 1950s and the 1980s almost all international students were either fully or partially funded by the Australian Government through aid programs, including scholarships (most notably through the Colombo Plan). In the late 1980s the Australian Government allowed full fee paying international students. These changes coincided with the growth and development of many countries in our region and international students came to Australia in large numbers for a quality education. Between 2002 and 2008 the number of international student enrolments have grown by an average of 12.2 per cent per annum, with growth in recent years above this average (18.5 per cent in 2007 and 20.2 per cent in 2008). The growth rate of international student enrolments between YTD September 2008 and YTD September 2009 was 19.0%. There were approximately 585 000 international student enrolments in Australia as of September 2009.

1.3 Increasing significance of vocational sector

In recent years there have been significant changes in the composition of the international student body, as well as the sectors and fields of education being undertaken by students. Traditionally higher education enrolments have dominated international education. However, both the VET and English language sectors experienced very strong enrolment growth in 2008 (approximately 46 per cent and 24 per cent respectively on 2007 figures).

Growth in the VET sector has been particularly strong in India with some 2 100 enrolments in 2002 growing to over 73 100 by September 2009 (with higher education enrolments only rising from 8 600 to 26 700 for the same period).

For the first time, total enrolments in VET have exceeded enrolments in higher education in 2009, challenging the traditional dominance of higher education. Simultaneously the number of public providers has declined slightly from 115 providers in 2002 to 107 in 2008, while private providers have increased from 914 in 2002 to 1066 in 2008.

Further details about enrolment numbers and the changing nature of the sector are included in [Appendix B](#).

1.4 Current environment

In 2009, Australia has attracted significant negative publicity in India resulting from a relatively small number of reported attacks and incidents involving Indian students. These reflect the large increase in Indian students in recent years, with enrolments increasing from approximately 11,000 in 2002 to 113,000 in 2009. Police have advised that the attacks are largely opportunistic and not primarily racially motivated. The media in India, but also at times in Australia, have since focused on students' other grievances and issues related to this substantial growth – accommodation, transport, employment exploitation and other student welfare issues together with concerns about the quality of Australian education institutions.

Current international student enrolments in 2009 remain high despite the global financial situation and the Indian issue (see Appendix B). However, there are anecdotal reports that enquiries for 2010 enrolments through Indian education agents have declined. To date, this negative publicity does not appear to have damaged the level of enrolments from other markets.

1.5 The Baird Review

This review, previously scheduled for 2010, was brought forward by the Deputy Prime Minister in the context of increasing concerns about sustainability of the international education sector given the uncertainties of the global financial situation and recent incidents involving the safety of international students, and increasing questions about the quality of some providers of education and training.

The Deputy Prime Minister appointed the Hon Bruce Baird on 8 August 2009 to conduct the review and provide a final report to the Government in early 2010. Mr Baird released an Issues Paper on 23 September 2009 and called for written submissions by 30 October 2009. An online forum was also made available for interested parties to make comments. Targeted consultations with key stakeholders, including students and student representative bodies, education providers and their peak bodies, state and territory governments and their regulatory bodies and diplomatic missions will be completed by the end of November 2009.

This Interim Report reflects the issues which have been recorded to date from consultations, many of which confirm the concerns and solutions identified by the International Student Roundtable hosted by the Deputy Prime Minister in September 2009. Further consideration of the issues is now underway through an analysis of written submissions and the contributions to the online forum.

2 Supporting the interests of students

International students are potentially a vulnerable group. ESOS recognises this by putting in place special legislative provisions for their protection, mainly with regard to: obligations on providers to monitor and manage their agents' activities; requirements on providers to make specific information available; consumer protection in the case that they do not receive the course for which they have paid; and detailed complaints handling procedures.

2.1 Information

The review has heard extensively of, at best, lack of information or access to it, to at worst, false and misleading information and/or deceptive conduct on the part of education agents both here and offshore. It is clear that accurate, timely, comprehensive information for prospective students from authoritative and trusted sources is essential to a good student experience. This information must comprise pre-departure information on the full range of issues facing a student who will live, work and study in Australia, possibly living for the first time away from home and usually living in a different culture for the first time. International students also have an ongoing need for information during their stay in Australia.

Enhanced legislative requirements placing a greater onus on education providers for the behaviour of their agents and to supply up to date information direct to prospective and enrolled students may be required.

This may also require consideration of some form of accreditation or industry self-regulation of education agents in Australia; and the review notes the positive involvement of Australia in assisting India to develop its own regulation of agents in that country. The review notes that the ESOS Amendment Bill currently before the Parliament will require providers to provide a list of the education agents that they work with on their website.

However any improvements to the ESOS legislative framework in themselves will not be sufficient. **The review is considering how authoritative information could be compulsorily required from education providers by institution and by course.** This could occur through a website portal, with comprehensive information about aspects of course quality, full course costs, costs of living, diversity of the student population (including whether only international students are enrolled), social facilities etc. This would enable prospective students to compare different institutions' offerings. Consideration may also be given to how to improve predeparture briefings by the Australian Government.

2.2 Tuition assurance

A key function of ESOS is tuition protection. Where a provider cannot provide a refund, the ESOS Act specifies that eligible students must be placed in a comparable course by that provider's Tuition Assurance Scheme (TAS). If that is not successful, the ESOS Assurance Fund must endeavour to place the student and failing that, may make a refund payment to the student.

Consultations to date have indicated that the current arrangements are too complex, do not support the student adequately at a stressful time, have not been able to place students and are leading to increasing claims on the ESOS Assurance Fund.

The review is considering how tuition assurance arrangements can be established to deal with an increased number of provider closures and ensure the cost is borne by education providers on a risk basis. This may involve tougher gateway entry requirements for registration under ESOS, including financial viability tests and possibly the provision of bank guarantees, greater analysis of risk based on the provider's business model (eg range of source countries, experience in Australian education sector), and placement of students under tuition assurance arrangements with any registered provider. Consideration will also be given to

greater harmonisation with comparable tuition assurance mechanisms such as those applying under the *Higher Education Support Act 2003*.

2.3 Complaints mechanism

The ESOS Act does not currently include an advocacy or conciliator role (for DEEWR or any other organisation) to assist students to resolve their complaints with their provider.

The review has found widespread support for a national international student consumer advocate to provide information to international students and facilitate dispute resolution. It is possible that such an advocate could also be responsible for tuition assurance. Some have suggested the creation of a student ombudsman. *The review is also considering whether the ESOS Act should be more specific about requirements for dedicated, appropriately trained and resourced staff to address the full range of student concerns which arise throughout their enrolment.*

3 Delivering quality as the cornerstone of Australian education

The competitiveness of Australian international education and the high demand for Australian trained graduates in the global labour market will be adversely impacted if the Australian education system, its courses and qualifications, are not regarded as being of sufficient quality now and in the future.

Whilst the quality of Australian education is primarily the responsibility of the assurance frameworks covering education and training services regardless of whether the recipient is an Australian or international student, the ESOS Act clearly has a role in protecting and enhancing our reputation internationally and ensuring international students receive the quality of education for which they have paid.

3.1 Entry standards for students (including English language)

The review is concerned about claims of a failure to maintain rigorous entry standards for courses. Many participants at student and provider consultation forums have expressed disquiet about the adequacy of English language skills. The review has also heard concerns about the integrity of IELTS language testing procedures. Variability of IELTS results (from country to country and from test to test) has also attracted comment. Questions have also been raised as to whether education providers are accepting students with a lower level than that required to satisfactorily participate in and complete their studies.

English competence of students can affect their ability to complete their studies and participate in academic life. For those seeking to migrate to Australia, English language is a threshold requirement. Failure to meet required levels after living and studying in Australia has been one of the issues causing frustration for Indian students.

Consideration will be given to whether compulsory entry requirements may be required, including specifying English levels relevant to the level of study or requiring providers to offer greater levels of English language support.

3.2 Diversity of student body

The review has heard differing views on how the diversity of the students undertaking a course or at an institution impacts the quality of the education experience.

International students themselves have understandably expressed concern at finding their classes almost entirely comprised of fellow nationals. Some education providers have argued that the composition of the class is not to the students' detriment where appropriate opportunities are provided for broader engagement, including with the wider Australian community. Others have noted that programs are often tailored to international students' needs and requirements.

Further consideration is required to determine whether prescriptive ESOS standards can address this issue. It may be that this is a factor that should be taken into account in registration requirements and applied in risk based assessment of providers for compliance monitoring. In addition, there has been support for student body diversity being included in information portals for prospective students.

3.3 Education resources and capacity

There is no doubt that a lack of appropriate education resources and infrastructure at some providers is detrimental to a quality education outcome. This is particularly the case where education providers have been approved for a certain capacity of international students and have then grossly exceeded this in enrolments. For example, a provider may have been approved for a capacity of 300 students and demonstrated that it has the training facilities for those students. However, if the provider subsequently enrolls 900 students the educational resources on which, in part, their registration has been granted, are no longer adequate. The same applies to the number of books in an institution's library, the number of classrooms and other facilities, and the availability of support services such as counsellors and student services.

The review notes the administrative enhancements have been made to allow state and territory education authorities to prevent further enrolments by providers who are over-capacity. Further consideration is being given to whether this requires specific strengthening in the ESOS Act.

4 Effective regulation

Registration under ESOS confers the ability to recruit international students. The numbers show that this can be a lucrative business which has attracted providers which may be more interested in the greatest financial return rather than delivering a quality education experience and outcome to our international students.

4.1 Legislative framework and its application

The review has heard clear evidence of the need to raise the bar to entry into international education and the requirements to remain in the industry. The solutions are likely to comprise:

- strengthened legislative requirements for providers, in terms of their financial credentials and the bona fides of individuals running the institution through an improved "fit and proper person" test and additional mechanisms to test affiliations with other providers and education and/or migration agents
- registration charges and other fees aligned to the costs and risks posed by providers and possibly specific financial requirements such as bank guarantees, and
- tougher compliance and enforcement through better risk based assessment and targeted compliance activity which is effectively resourced at the federal and state levels.

The review is also considering how the regulation of the sector can be much more effectively achieved through risk methods to ensure good providers are not unnecessarily burdened while higher risk providers are more heavily targeted.

The review notes that the ESOS Amendment Bill is also seeking to establish requirements that a provider have a principal purpose of education and a demonstrated capacity to deliver education of a satisfactory standard.

4.2 National Regulator

The review notes the work in progress to establish the TEQSA and related COAG work on the development of national regulation for the vocational sector. There has been widespread support in the consultations for the review for national regulation of the international education sector to reduce duplication and overlap and the complexity and confusion caused by multiple regulators' approaches to the ESOS framework.

5 Sustainability of the international education sector

The benefits of international education accrue to both international students and Australia more broadly. Good educational experiences not only sustain Australian international education, they support long-lasting business, diplomatic, research and cultural ties and contribute to research and innovation goals.

International students also enrich our society by contributing to a diverse education experience for all Australians; they provide opportunities for a wider range of courses to be offered and they promote cross cultural experiences generating greater understanding and acceptance of others. Prospective, current and past students have a very significant influence on the future of Australian international education, as well as Australia's broader prosperity and international standing.

The review considers the long-term sustainability of the international education sector is dependent on meeting students' expectations of a quality education and a positive student experience and producing international graduates with highly sought after qualifications and skills. These aspects have been addressed in the preceding sections to the extent they are addressed by the ESOS framework. However, substantial other areas which go to the overall international student experience and their wellbeing while living, studying and working in Australia require other issues to be addressed as outlined in the next section.

6 Related Issues

The work of the review has identified numerous areas of concern which cannot be resolved through either the ESOS framework or its application. Some of these will be progressed by parallel work relating to international students and education quality (eg the COAG national International Student Strategy and national vocational regulation and establishment of TEQSA).

The review's consultations are identifying housing, transport, health, and better practice to include international students both in the academic life of their institution and the broader community in which they live as significant issues. Restoring the balance between education chosen for its quality and future skilled migration options will require major policy changes sensitively handled.

6.1 Accommodation

International students, particularly in Sydney and Melbourne, are finding it increasingly difficult to access suitable accommodation at a range of price points. Distressing stories about accommodation below acceptable Australian standards are not uncommon.

This is a complex community issue which also affects domestic students, and other groups who have similar difficulties as international students in establishing their financial history and references as previous tenants. However, a common complaint of education providers has been that despite providing accommodation in apartments, houses and home stay programs often students move quickly into overcrowded group houses to reduce their overall living costs.

The solutions will also be complex. Ensuring that students are fully aware prior to their arrival of the costs of living, including costs of various forms of accommodation is essential. Facilitating their access to rentals through the willingness of education providers to become the head lessor may assist in greater availability of accommodation for students, as could encouragement of public-private partnerships in increasing the supply of student accommodation. More effective control by state, territory and local governments to tackle overcrowding and below-standard accommodation is also part of the solution.

6.2 Transport

Lack of access to transport concessions for international students in New South Wales and Victoria has become a touchstone issue. International students claim the failure to provide transport concessions in the same manner as domestic students is direct discrimination. The view expressed in student consultation forums was that this is both racist and discriminatory. Some attention could be given to issuing travel passes at discounted prices specifically for international students or concessional travel on government transport services only.

6.3 Working while studying

The exploitation of international students who are employees has received substantial attention in 2009.

The review has heard the concerns of students regarding the limitations on their rights to work while on a student visa but is not convinced there is a need to change these limits.

Of more concern is the lack of awareness by international students of their rights as a worker in Australia. Some believe they are not covered by our workplace laws. Others believe they will have their visa cancelled if they complain about conditions or pay rates. Many accept cash-in-hand jobs, possibly avoiding tax obligations but also leaving them vulnerable to exploitation.

The review is considering whether further action is required to reduce exploitation in the workplace.

6.4 Health

International students are required as a condition of their student visa to maintain Overseas Students Health Cover (OSHC) which entitles the student to basic medical cover (analogous to Medicare). Concerns have been expressed, particularly by overseas governments, that students are not retaining their cover beyond their first year. This leaves students without any type of medical safety net during their second and subsequent years.

The review will give further consideration to both the level of cover and appropriate ways to ensure all international students retain cover for the duration of their stay in Australia.

6.5 Safety

Australia has suffered enormous damage to its reputation with India during 2009. State police forces, notably in Victoria and New South Wales where most incidents occurred, have increased their attention to

international student safety. A national on-going police response is required to demonstrate that the safety of international students is taken seriously by Australia. Reliable data collection is essential to this effort to show the incidence of Indian students (or other nationalities) victimised and that offenders are caught and punished.

6.6 Social inclusion and engagement

The review has heard from international students that life as an international student can be isolating and lonely. Many desire more involvement with domestic students and support to engage in the broader Australian community. Good examples already implemented by education providers include mentoring and buddy programs to encourage more interaction with Australian students. **Better use should be made of sporting and social clubs to promote inter-cultural harmony.**

More effort from governments, education providers and communities alike is required to help international students be engaged in their local communities; and to increase Australians' understanding of the contribution these students make to our society.

6.7 Migration-driven demand

Much of the recent growth in international student enrolments (see Appendix B) can be attributed to the attraction of Australian permanent residency. The number of students who have completed their course and have applied for permanent residency already numbers in the tens of thousands and can be expected to continue to rise.

There is a high risk that students seeking a migration outcome will attempt to enrol in courses perceived to require minimum academic entry requirements and study effort, often with minimal class attendance, and have overwhelmingly been dominated by commercial cooking, hospitality and community welfare.

The former Government encouraged this demand in 2001 by allowing on-shore applications from completing international students. This situation was exacerbated in 2005 when changes to the skilled migration points test made trades courses more attractive through additional points granted to occupations on the Migration Occupations on Demand List (MODL). This has rapidly accelerated the establishment of high risk colleges, inadequate safeguards and large numbers of students enrolling in migration-driven courses. The Minister for Immigration and Citizenship, Senator the Hon Chris Evans, has responded to this issue with the introduction of a smaller Critical Skills List, and lower processing priority to those relying on the MODL, increased English language thresholds and the introduction of a job ready test from 1 January 2010. A review of the MODL is also underway.

However, these changes and likely further migration changes will inevitably increase the frustration of both graduated international students awaiting a migration outcome and those who have chosen a course in the mistaken belief it will lead to permanent residency. It will be crucial that changes are handled sensitively and communicated well in advance, with 'grandfathering' where possible and appropriate.

7 Conclusion

The ESOS framework is a key foundation for international education in Australia. It has helped to put Australia at the forefront of international education provision and provided a solid foundation for the sector. Stakeholders generally support both the need for ESOS and the current regulatory model.

However, as the current environment has shown, there are gaps in the legal framework and its application.

This review is identifying the need for enhancements to the ESOS Act to support education quality and protect international students. It is anticipated that the final report to be delivered to the Government in early 2010 will address its recommendations to the key issues identified in this interim report; further areas of interest may be identified by the analysis of written submissions and contributions to the online forum which is currently underway and the remaining targeted consultation which will be completed by the end of November 2009.



Australian Government

**Department of Education, Employment
and Workplace Relations**

Terms of Reference for the review of the *Education Services for Overseas Students (ESOS) Act 2000* and associated regulatory and legislative frameworks

The Australian Government has brought forward the planned 2010-11 review of the legal framework for the provision of education services to international students in the context of significant growth in the number of overseas students, the changing composition of the international student body and emerging issues in the sector.

This Review will examine the operation of the *Education Services for Overseas Students (ESOS) Act 2000* and associated regulatory and legislative frameworks, including the National Code. It will look at the adequacy of the current ESOS legal framework to identify and address any areas for improvement to ensure Australia offers a world-class, quality international education in this changing environment.

The Review will be conducted in parallel with a number of related processes, notably the development of a National International Student Strategy under the Council of Australian Governments (COAG) and the establishment of the Tertiary Education Quality and Standards Agency (TEQSA).

The key objectives of the current ESOS Act (see s.4A) are:

- a. to provide financial and tuition assurance to overseas students for courses for which they have paid
- b. to protect and enhance Australia's reputation for quality education and training services
- c. to complement Australia's migration laws by ensuring providers collect and report information relevant to the administration of the law relating to student visas.

The Review will consider the need for enhancements to the ESOS legal framework in the following four key areas:

1) Supporting the interests of students

This will include a focus on:

- the adequacy and accuracy of information for students
- protection of students as consumers
- consistent treatment of students regardless of location or provider
- provider accountability
- broader support for students.

2) Delivering quality as the cornerstone of Australian education

This will include a focus on:

- nationally consistent quality
- quality of providers entering the market
- mechanisms for ongoing monitoring, quality assurance and quality improvement of registered providers.

3) Effective regulation

This will include a focus on:

- clarity of roles and responsibilities under the framework
- identification and management of risks
- efficient and streamlined regulatory arrangements which minimise the regulatory burden on providers
- timely and effective enforcement of compliance.

4) Sustainability of the international education sector

This will include a focus on:

- provider sustainable business strategies
- preparing for the transfer of the ESOS regulatory functions to TEQSA by 2013
- transition arrangements for any industry adjustments required in response to this Review.

Process and timeframe for the Review

The Deputy Prime Minister, the Hon Julia Gillard MP, has appointed the Hon Bruce Baird to undertake the ESOS Review under the agreed Terms of Reference, with secretariat support provided by the Australian Government Department of Education, Employment and Workplace Relations (DEEWR).

An issues paper will be released on the Australian Education International website in September 2009, outlining the key issues for the international education sector and inviting written submissions from interested stakeholders on specific consultation questions by the end of November 2009.

At the same time, the Reviewer will hold targeted forums with key stakeholders, including state and territory government officials, regulatory bodies, education providers, student bodies and diplomatic missions.

Feedback from the scheduled roundtable with international student representatives in Canberra in early September 2009 will also inform the Review.

An interim report from the Review will be available for consideration by COAG in November 2009 with a final report expected in early 2010.

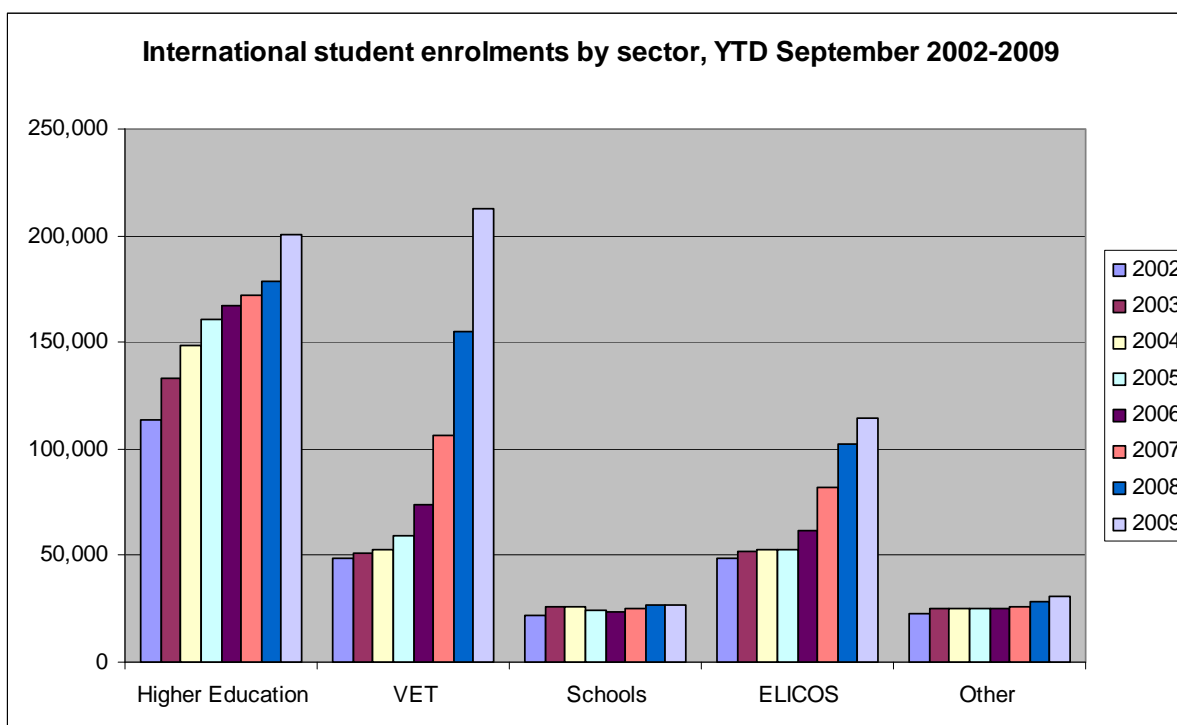
Australian international education data

ALL international student enrolments by sector, YTD September 2002–2009

Sector	2002	2003	2004	2005	2006	2007	2008	2009
Higher Education	113,821	132,862	148,655	160,493	166,920	171,949	178,318	200,593
VET	48,573	51,285	52,450	59,113	73,617	106,186	155,142	212,538
Schools	21,913	25,710	26,226	24,181	23,210	25,221	27,061	26,669
ELICOS	48,387	51,918	52,477	53,086	62,015	82,382	102,418	114,321
Other	22,919	25,023	25,203	25,370	25,459	26,333	28,804	31,065
Grand Total	255,613	286,798	305,011	322,243	351,221	412,071	491,743	585,186

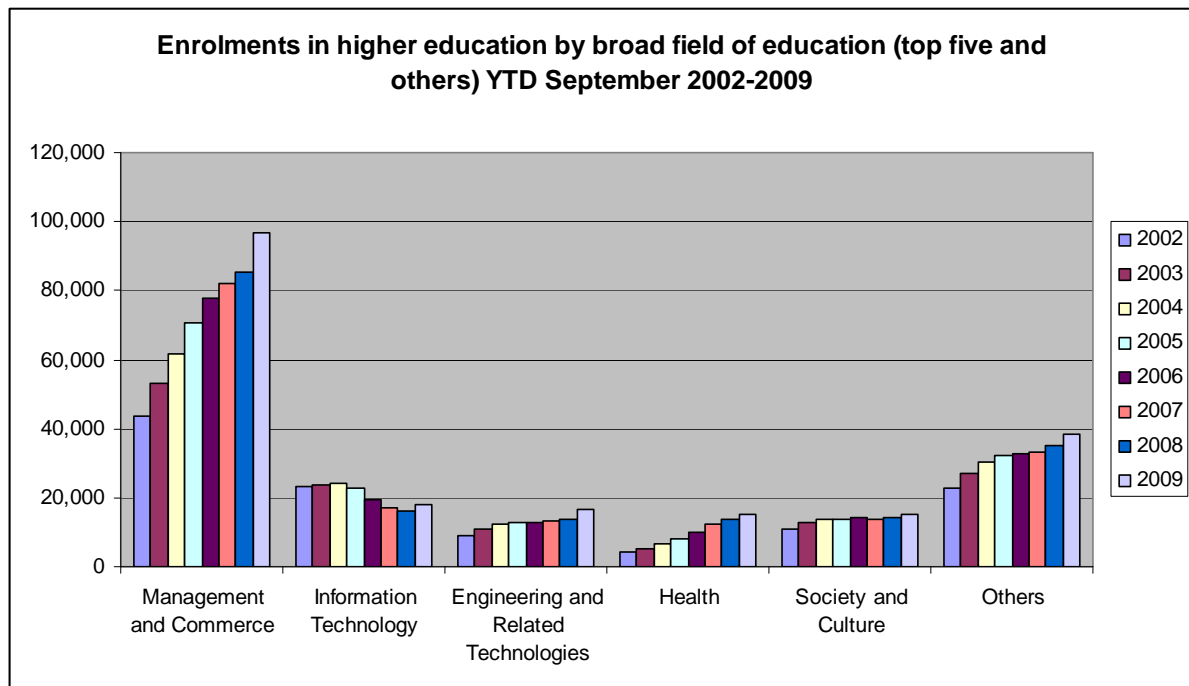
INDIAN student enrolments by sector, YTD September 2002-09

	2002	2003	2004	2005	2006	2007	2008	2009	% growth 2009 on 2008
Higher Education	8,661	11,605	16,945	21,032	23,713	25,207	25,953	26,743	3.0
VET	2,103	1,345	1,395	3,251	8,652	23,372	45,477	73,174	60.9
ELICOS	47	261	907	961	2,130	7,001	12,289	11,927	-2.9
Schools	63	51	49	49	60	85	103	170	65.0
Other	90	114	129	135	220	458	564	884	56.7
Grand Total	10,964	13,376	19,425	25,428	34,775	56,123	84,386	112,898	33.8



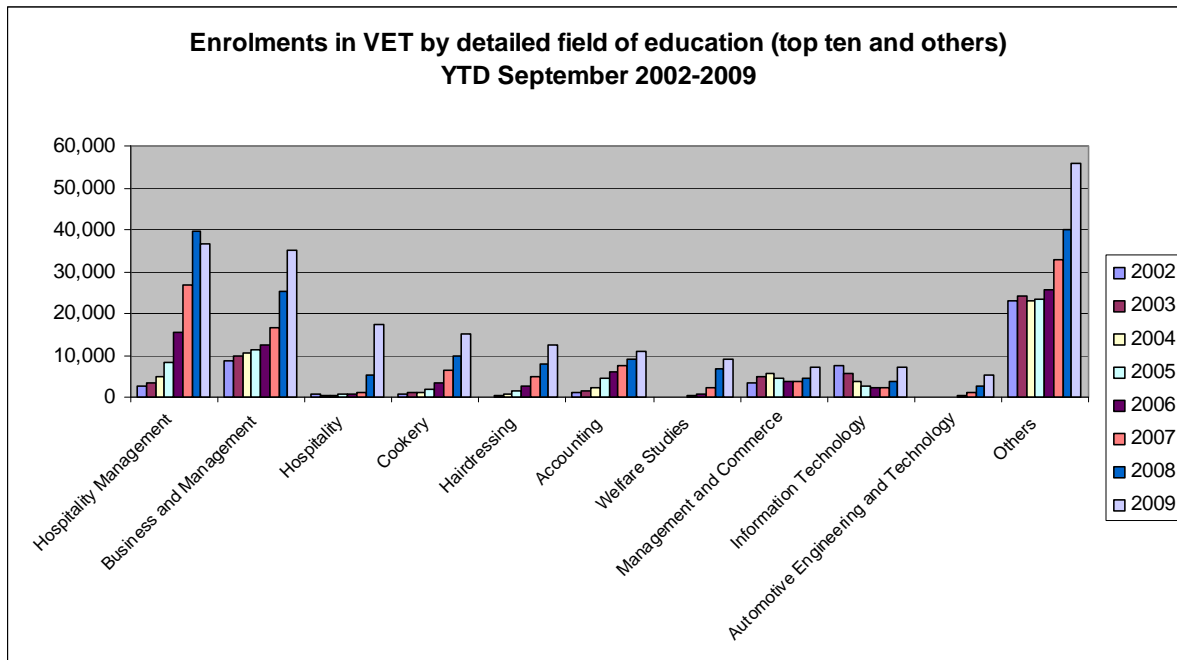
Enrolments in higher education by broad field of education (top five and others), YTD September 2002–2009

Broad Field Of Education	2002	2003	2004	2005	2006	2007	2008	2009
Management and Commerce	43,757	53,082	61,728	70,545	77,752	82,291	85,224	96,972
Information Technology	23,173	23,902	24,069	22,762	19,564	17,009	16,174	17,961
Engineering and Related Technologies	8,925	10,854	12,360	12,753	12,735	13,181	13,974	16,434
Health	4,138	5,120	6,411	8,095	10,081	12,158	13,639	15,397
Society and Culture	11,129	12,759	13,639	13,942	14,008	13,956	14,081	15,397
Others	22,699	27,145	30,448	32,396	32,780	33,354	35,226	38,432
Grand Total	113,821	132,862	148,655	160,493	166,920	171,949	178,318	200,593



Enrolments in VET by detailed field of education (top ten and others), YTD September 2002–2009

Detailed Field Of Education	2002	2003	2004	2005	2006	2007	2008	2009
Hospitality Management	2,688	3,541	4,800	8,299	15,374	26,896	39,626	36,756
Business and Management	8,615	9,650	10,488	11,383	12,338	16,725	25,336	35,268
Hospitality	693	557	553	634	757	1,097	5,464	17,284
Cookery	791	1,166	1,279	1,836	3,525	6,574	9,651	14,924
Hairdressing	159	348	645	1,361	2,570	4,776	8,067	12,541
Accounting	1,309	1,544	2,289	4,551	6,213	7,681	8,987	11,054
Welfare Studies	8	21	85	275	745	2,445	6,945	9,082
Management and Commerce	3,506	4,812	5,550	4,579	3,867	3,860	4,381	7,270
Information Technology	7,637	5,616	3,780	2,767	2,240	2,421	3,830	6,987
Automotive Engineering and Technology	15	5	4	11	254	987	2,695	5,357
Others	23,152	24,025	22,977	23,417	25,734	32,724	40,160	56,015
Grand Total	48,573	51,285	52,450	59,113	73,617	106,186	155,142	212,538



**Number of international education providers by provider type
YTD September 2002-2009**

