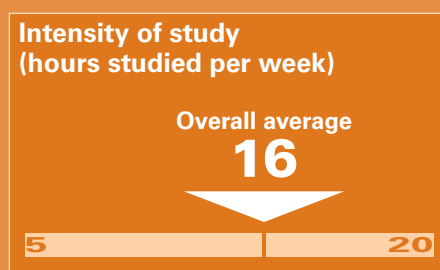
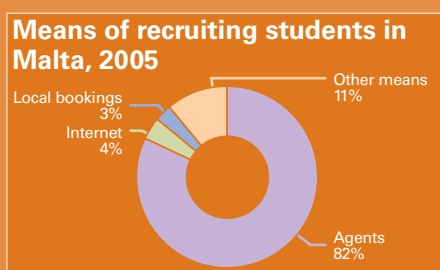


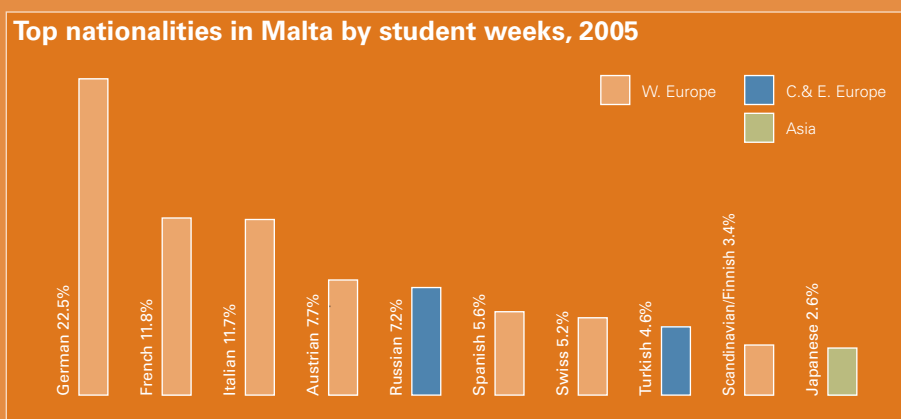
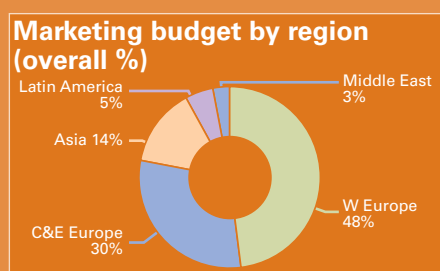
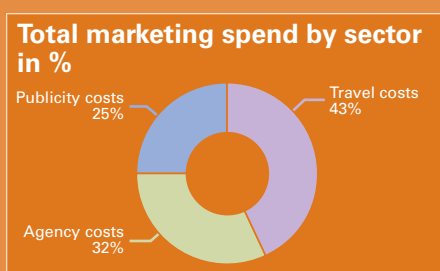
Status: Malta 2005

The Status survey gathers specific market data about all of the main language teaching markets in the world. Through this initiative, it is now possible to compare world market statistics, a summary of which will be published in the March 2007 issue.

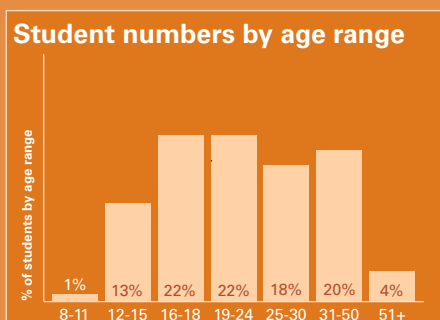
If you would like to see the complete breakdown of data, please visit www.hothousemedia.com/statuszone/lmstatus/lm05.htm where this information is available. Thanks to all the schools that contribute valuable data - confidentially - to help us produce this market information.



- ### Key points
- Number of participating organisations in the Malta survey: **11**
 - Total number of students at the organisations in 2005: **34,561**
 - Total number of student weeks in 2005, estimated: **120,964**
 - Overall average length of stay in weeks: **3.5**
 - Average cost of a one-month course, excluding accommodation: **€583 (US\$744)**
 - Average cost of residential accommodation per week: **€199 (US\$254)**
 - Average cost of host family accommodation per week: **€213 (US\$272)**
 - Average commission paid on a language course: **20 per cent** (from 10 to 25)
 - **Ten** institutions paid commission on accommodation (from 5 to 20 per cent)



- ### Observations
- One less school took part in this survey than in our last survey but the total students taught in 2005 by our respondents was up, as was the average length of stay, meaning total volume of the market seems to have increased year on year.
 - Agents accounted for more bookings in 2005 than in 2004, up from a good 67% to a very impressive 82%, with all other recruitment means declining slightly.
 - The nationality mix was similar, year on year, with the main change being French students now in second position after Germans, up from fourth place last year. Otherwise, the top five remained unchanged, while Spanish students moved up the grid and Japanese featured in tenth position.
 - Prices for tuition were up by around US\$50 and for accommodation, on average by US\$100.



Thank you to the following institutions for taking part in our Status survey: AM Language Studio, Sliema; BELS, Kerzem, Gozo; EC Malta, Ta'Xbiex; English Language Academy, Sliema; Gateway International School of English, St Julians; Inlingua School of Languages, Sliema; LAL Institute of English Language Studies, Sliema; Gzira; and Ghajnslelem (Gozo); Linguatime School of English, Sliema; MSD International School of English, St Paul's Bay; Skylark School of English, Msida; Spachcaff Languages Plus, Halba.

Status Survey statistics are based on figures supplied by a selection of individual schools. Not all survey respondents answered every question in the survey. Figures are, in some cases, rounded up or down to the nearest whole. All information is treated with the strictest confidence.

**Next month:
South Africa**

Dutch push student exchange

DUTCH STUDENTS will soon be able to receive a student grant to study overseas, according to an announcement by Bruno Bruins, State Secretary for Education, Culture and Science in the Netherlands, while a new advertising campaign also aims to encourage more international students to study in the country.

Domestic students in the Netherlands normally receive a grant of about €250 (US\$319) a month from the government but previously received no financial help if they decided to study overseas. The new plans, which are expected to take effect from autumn 2007, will make it much easier for Dutch students to study overseas and should boost the outgoing student market.

Bruins commented, "There are currently many more foreign students coming to the Netherlands than vice versa. That needs to change if we want to keep our international outlook. Making student grants and loans portable will give this ambition a major boost."

Meanwhile, a new 2007-2008 advertising campaign was launched earlier in the year by Nuffic, the Netherlands Organisation for International Cooperation in Higher Education. The campaign aims to reach students across the globe and marketing materials include a CD-rom of English language programmes available in the country as well as a revamped website, www.studyin.nl.

Wales says no to top up fees

European Union (EU) students studying at a university in Wales will be able to claim back the cost of top-up fees after a ruling by the Welsh Assembly allowing Welsh domiciled students to apply for a grant that will offset the cost of the new fees.

From September 2007, Welsh universities will be able to charge students up to UK£3,000 (US\$5,728) in "top-up fees" in a new funding system that was already introduced in England in September 2006. However, a motion passed in the Welsh assembly offsetting the fees for Welsh students studying in Wales will also apply to EU students, due to an EU ruling that students from member states must be treated on the same basis as counterparts from the same country.

English, Scottish and Northern Irish students studying in Wales, however, will not be eligible for the grants, nor Welsh students studying elsewhere.

It is estimated that there are currently 1,700 EU students studying in their first or second year at Welsh universities and this number could rise in the future as students seek out lower fees. A spokesperson for the Welsh Conservative party said, "It's a price worth paying for the sake of the Welsh students who will not have to pay top-up fees."

Latest statistics from the Universities and Colleges Admissions Service (Ucas) in the UK show that 15,000 fewer students began their studies at British universities this year as a result of the introduction of top up fees in England last year.

While international students from outside the EU have always had to pay tuition fees, reduced enrolments from some EU

countries have contributed to the overall decline. Numbers of new Spanish, Irish and Swedish students decreased this year, although the new EU student markets of Lithuania, Latvia, Malta and Poland continued to perform strongly. Overall, international student enrolments increased by just 0.7 per cent for the 2006/2007 academic year compared with the previous year.

Canadian marketing initiative

THE GRANDE YELLOWHEAD Regional School District in Alberta, Canada has developed its own international student recruitment programme after schools in the district grouped together to form a joint international marketing initiative.

Nicole Merrifield, Communications Manager at Grande Yellowhead Regional Division, explained, "Grande Yellowhead has had a strong international student programme for many decades, however, the division had not been making a concerted effort to recruit potential international students. As finances are limited the schools decided to start small, developing a brochure that highlighted the international programmes offered by Grande Yellowhead, the specific programmes and extra-curricular

activities of each school and the values of our pristine setting and small communities."

Merrifield added that promotional activities have so far involved the direct mailing of agents overseas, attending agent fairs and advertising in international publications. "Once we determine how successful each of these initiatives have been, our committee will determine the next steps for building our international student programme," she said.

The school district is made up of 18 separate high schools and Merrifield believes they have a lot to offer international students, both academically and recreationally. "We boast a wide range of recreational and outdoor pursuits as we sit at the base of the the majestic Rocky Mountains," she said.

Malaysia-China agreement

Malaysia and China have agreed to work together on a mutual accreditation system for higher education students that will see both countries recognising each other's education qualifications. Malaysian Higher Education Minister, Datuk Mustapa Mohamed, announced plans to recognise more foreign qualifications in order to allow more foreign students to continue their studies in Malaysia.

Saudi links with India

Saudi Higher Education Minister, Dr Khaled Al-Anqari, visited India at the end of 2006 to discuss a scholarship programme that would allow Saudi students to receive government funds to study in India. Earlier in the year, the Indian Minister for Human Resources Development held talks with university representatives to identify academic areas where Saudi students would be able to go to India on scholarships.

Elite German universities

Three universities in Germany will receive an extra US\$26 million in government funding each year after they were awarded elite designation in an initiative designed to make the country's universities more competitive internationally. The University of Karlsruhe, the Technical University of Munich and the Ludwig-Maximilians University of Munich all received the elite status award.

Business schools accredited

Five business schools achieved accreditation by Equis, the international business school accreditation body in October this year. The Faculty of Economics at the University of Ljubljana in Slovenia, the School of Business and Management in France, Tanaka Business School at Imperial College London in the UK, Queen's School of Business at Queen's University in Canada and Umea School of Business at Umea University in Sweden all achieved the required quality standards.

Study in Australia event

Australian Education International in South Korea has launched a unique online event in a bid to encourage more Korean students to study in Australia. The 'Study in Australia' event was launched through South Korean Internet portal Daum communication and included three competitions involving taking photos, a mini quiz and writing a story.

What has Education New Zealand been doing lately?

Education New Zealand is active across a wide range of areas including managing the overall generic promotion of New Zealand via a range of marketing activities as well as inward and outward missions. Other initiatives include further development of the 'New Zealand Educated' brand and the www.newzealandeducated.com student website.

How have you been involved in shaping government/visa policy?

Following the 2005 changes to student immigration policy, the major policy work with relation to immigration this year has included extensive work into the new immigration consultants legislation (where we were successful in ensuring that offshore education agents weren't caught

up in this legislative change) and input into the Immigration Act Review. Outstanding issues that we continue to work on include [students' right to work] policy and the regulations concerning students changing institutions. Outside of immigration, there are many policy areas that EdNZ is actively engaged with, including quality assurance policy and wider tertiary policy.

What agent-targeted promotional activities have you been involved in?

EdNZ has managed an extensive programme of agent-centric activities over the last 12 months. This has included 13 different fam trips for agents from 18 different countries. As well as this we hosted large groups from both Tiecea (Thailand) and Kosa (Korea) in New Zealand in very successful joint ventures.

EdNZ also supports a range of offshore agent seminars with both a generic presence and via coordinating and enhancing institutional support of offshore agents events. During 2006 we also formed the New Zealand India Education Representatives (NZIER) Group, to further support and acknowledge high performing agents in India.

What particular challenges does New Zealand face?

International competition, the relative cost of coming to New Zealand and price dumping by some competitors are all major issues for New Zealand. We accept competition of course and can do little about our geographic proximity but good quality New Zealand institutions cannot and will not compete on price gouging, which is not helpful for anyone in the industry.



Education
NEW ZEALAND

Full name: Education New Zealand

Year established: 1999

Organisation's main role:

Education New Zealand is a not-for-profit charitable trust that is governed by the New Zealand export education industry, and is committed to an 'NZ Inc' approach to the export of New Zealand's education services offshore.

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