



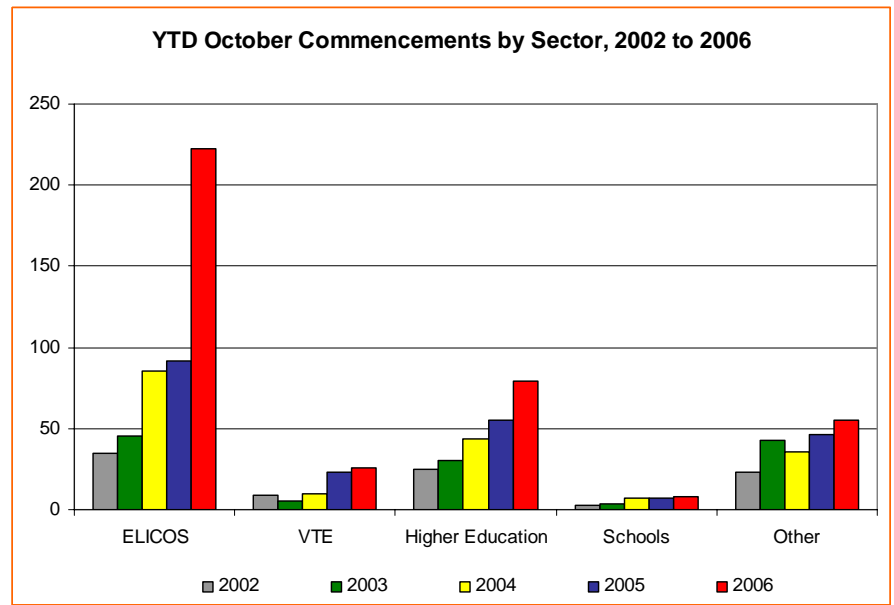
Chile

Between 2002 and 2005, the number of Chilean enrolments in Australia grew strongly at a rate of about 30% per year but from a very small base. By contrast, in 2006 there has been a marked acceleration in the growth rate. In the period year-to-date (YTD) October 2006 there has been a 62% increase in the number of enrolments compared to the same period in 2005, and a 75% increase in the number of commencements. Most of this growth has been in the ELICOS sector and to a lesser extent in Higher Education.

The overwhelming public response to the *Study in Australia* exhibition at the end of August 2006 – which saw 10,000 visitors through the doors over two days – suggests that the current rate of growth is sustainable throughout the coming year. The impact of this event is yet to be reflected in the student enrolment data, but is expected to be significant. Data obtained on recent enrolments to the UK, USA and Canada suggest that Australia is taking market share from each of its major English-speaking competitor countries.

Following two revisions in the DIMA Assessment Level for Chile in 2005 (from AL3 to AL2 in March and from AL2 to AL1 in November 2005), Chile is the first country in Latin America to be rated as AL1 across all student visa sub-categories.

A potential barrier to continued growth has been the comparatively small number of education agents in Chile although recent indications are that this situation may be about to change. Chile has the most open economy in Latin America and Australian institutions have yet to fully explore the potential for in-country delivery of education and training services.



English Language Intensive Courses for Overseas Students (ELICOS)

- ELICOS is the dominant sector for Chilean students—accounting for 51% of all enrolments of students on student visas in YTD October 2006.
- Over the first 10 months of 2006, enrolments grew by 129% and commencements by 141% compared to the same period in 2005.
- English Australia reports that in 2005, 53% of Chilean ELICOS students were studying on a visa other than a student visa¹—these are not included in AEI data. The number of Chilean ELICOS students in Australia is likely, therefore, to be about twice that reported in AEI data.
- The Chilean Government's strong focus on increasing the number of Chileans who are proficient in English through its "English Opens Doors" programme has led to teacher-training and consulting opportunities for Australian English language providers.

Vocational and Technical Education (VTE)

- Enrolments are rising from a very low base—up 13% in YTD October 2006 compared to the same period in 2005.
- A joint Australia-Chile VTE Symposium in November 2005, opened by the Chilean Minister for Education and attended by 270 delegates, did much to profile the quality of the Australian VTE system.
- AEI is currently organising Australian technical assistance to the Chilean Government in the design and implementation of a Chilean Qualifications Framework, which will improve portability of qualifications not only between one sector and another in Chile, but also between the Chilean and Australian systems.
- The areas of greatest interest to Chilean industry are Agriculture, Mining and Tourism and Hospitality.

Higher Education (HE)

- Enrolments increased by 32% in 2005 and by a further 23% over the first 10 months of 2006.
- Given the over-supply of undergraduate places in Chile (with 65 universities for a population of 16 million) and the comparative lack of postgraduate programmes, the best prospects for Australian HE providers will be in niche postgraduate areas. The HE fields of study currently most attractive to Chilean students are Business, Engineering, Economics, Education and the Sciences.
- In YTD October 2006, 62% of Chilean HE students were enrolled in Master's programmes, 21% in Bachelor level courses, 14% in PhD programmes, and 3% in Graduate Certificates or Diplomas.

Schools

- In spite of the change from AL3 to AL1, a move that would now allow Chilean students to undertake semester-long programmes at high school in Australia, there has been little development within this sector. AEI anticipates that the number of fee-paying Chileans studying in the Schools sector in Australia will remain small.
- Potential exists for the establishment of mutually beneficial sister school relationships between Australian and Chilean schools.

¹ Survey of Major ELICOS Regional Markets in 2005 (English Australia 2006).