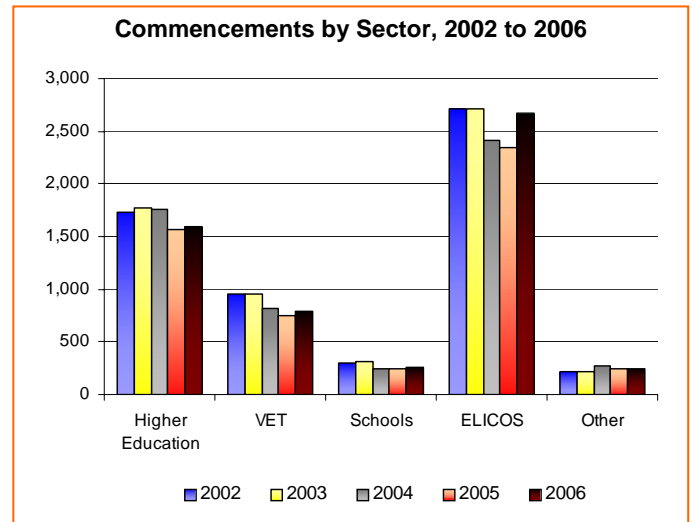




Taiwan

In 2006 the number of Taiwanese commencing study overseas increased by 9.1% to total in excess of 37,000 students. Australia is gaining recognition as a quality study destination and is positioned third in the Taiwan market behind the United States and United Kingdom, and ahead of Japan and Canada. Commencements in Australia from Taiwan grew 7.9% in 2006, the most significant increase (14.2%) being in the ELICOS sector.

With China's recent economic growth, Taiwan has shifted most of its low-technology manufacturing to China and re-focussed on value-added processes such as advanced technology, research, design, and the services sector. While Taiwanese industry demands skilled graduates with an international outlook and English language skills, it is reported that the domestic education system has been unable to respond sufficiently to meet the needs of the new economy. Australian providers across all sectors are in a position to benefit from this level of demand for a quality international education, particularly in the following areas where predicted shortfalls of skilled graduates will exist -



- High-tech industries:** Semiconductor, Digital display, Digital content, Biotechnology, ICT & Technology, Management, Basic Sciences, Industrial Engineering, Environmental Sciences, and Green technologies (particularly in the field of Photovoltaics).
- Services industries:** Design (particularly in the field of Industrial Design), Marketing, Environmental Protection, Medical Services, Tourism, Hospitality, and Recreation.
- Creative industries:** Arts Management, New Media, Creative Arts, and Design.

Higher Education (HE)

- Taiwan is Australia's ninth largest HE market for enrolments. March 2007 Year to Date (YTD) figures show a 5.3% increase in commencements on 2006.
- Due to an oversupply of domestic undergraduate places, the Taiwan HE market has shifted to a predominately postgraduate one (at 64%). A postgraduate degree from abroad is increasingly seen as a differentiator for employees in the domestic labour market and a prerequisite to securing a good job.
- Business Administration and Management courses remain the most popular areas of study in this sector at 47% of commencements, followed by Arts, Humanities and Social Sciences at 10%, and Computer Science and Information Systems at 7.6%.
- Australian institutions are well-positioned to meet the above-mentioned areas of predicted skill shortages, particularly at the postgraduate level.

English Language Intensive Courses for Overseas Students (ELICOS)

- The Taiwan ELICOS market experienced significant growth in 2006, with a 14.2% increase in commencements on 2005. Taiwan is Australia's sixth largest market for both commencements and enrolments in this sector.
- The enthusiastic uptake of the Working Holiday Maker (WHM) visa since its introduction to Taiwan in November 2004 has affected ELICOS student visa numbers. With a lower application fee, many students have opted to study under the WHM visa over student or tourist visas which are reflected in a March 2007 12.3% YTD decline in ELICOS student visas issued. The recent Australian WHM and ELICOS exhibition in Taipei attracted over 5,000 attendees, setting the foundation for further growth under this visa class.

Vocational Education and Training (VET)

- Taiwan remains a developing VET market, and commencements in 2006 increased 6.2% on 2005.
- 'Services, Hospitality and Transport' (including Tourism) have overtaken 'Business Administration and Management' (36.8% and 32% respectively) as the most popular fields of study in the VET sector from Taiwan. The areas of 'Language Studies', 'Nursing' and 'Visual and Performing Arts' have also seen increases in commencements.

Schools

- Taiwan is Australia's ninth largest market for schools sector enrolments and the eighth largest for commencements.
- The schools market grew at modest levels in 2005 and 2006, however March 2007 YTD figures show an encouraging 16.5% increase on 2006 numbers. This market growth has been supported by the AEI Taipei Australian Schools Exhibition, run annually since 2005.
- Seventy-eight percent of Taiwanese school students choose to study in Australian non-government schools, primarily for their boarding facilities.