Changes in Student Mobility

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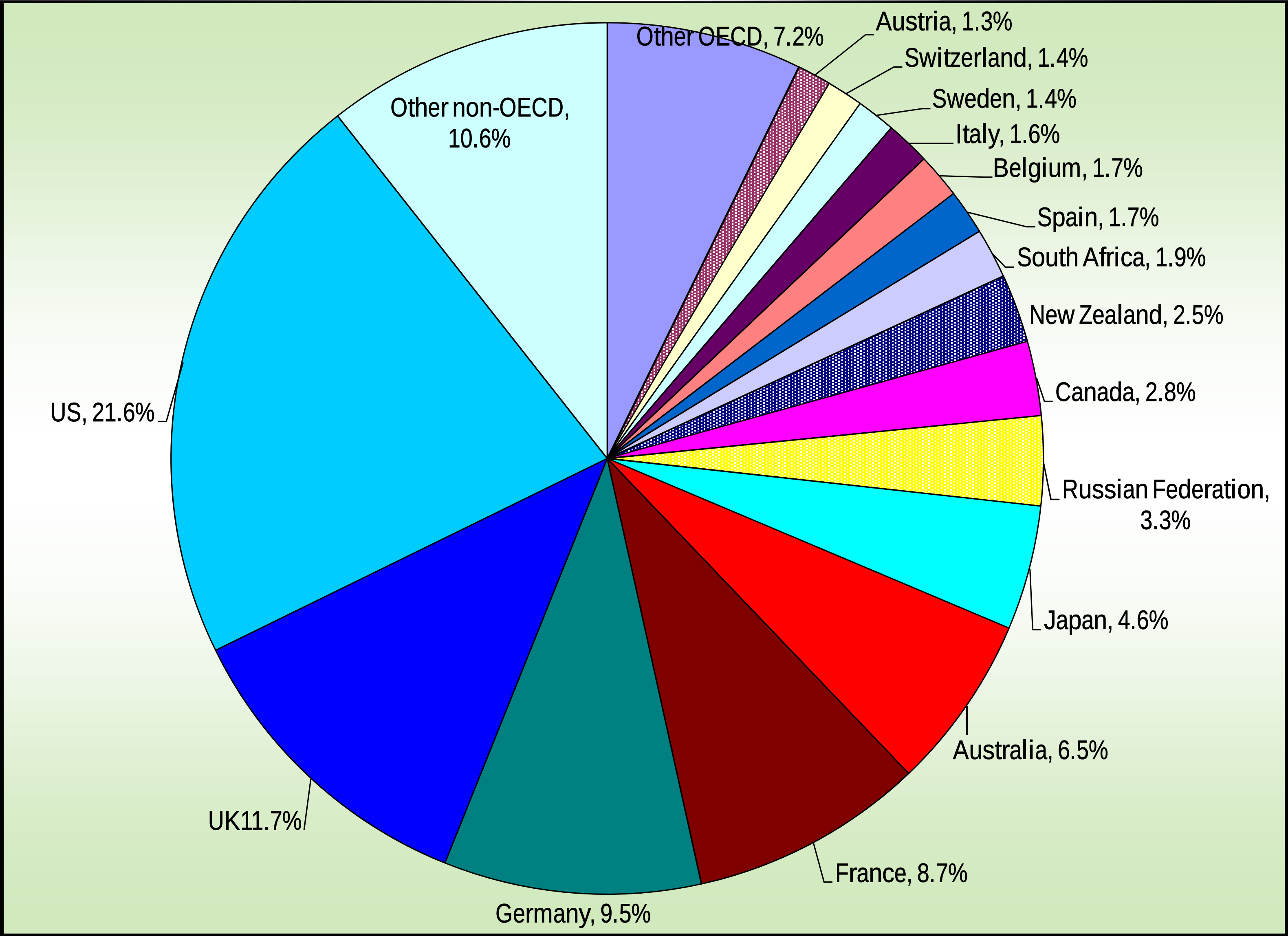
Tony Adams, Tony Adams and Associates

Defining Global Mobility: Modes of Supply-WTO

Mode of Supply	Definition	Description
Mode 1	Cross Border	Distance and on line Education
Mode 2	Consumption Abroad	Student Mobility
Mode 3	Establishment	Transnational Programs and Branch campuses
Mode 4	Movement of Natural Persons	Staff mobility

Distribution By Destination Country- OECD 2005



What do we know about those students?

- IDP Education Australia since 1995 have carried out regular economic forecasts for international student demand
- Their top 10 source countries in 2025 based on their modelling are
  - China 645,00, India 302,000, South Korea 127,000, Morocco 106,000, Turkey 104,000, Japan, 60,000, Germany, 60,000, Indonesia, 60,000, Greece, 59,000, Pakistan 54,000

The IDP Model

- The model creates a tertiary participation rate based on income data. It also creates a foreign access rate based on income. As income rises, more students access tertiary education and more students can access foreign countries for it.
- As the income rises the in-country participation rises because of additional universities being constructed.
- So as the income rises the foreign access rate will actually decline because of these new universities-so there is a long term balancing of these factors.
- For a particular destination country this final number can be applied to the market share of that country to create a demand figure by year.

What this means for long term mobility of students

- There is a predicted growth of between 3-4% over the period to 2025.
- 80% of students will come from just two countries; China and India.
- European and other developed source countries will have little or no growth. Germany (56,000, 2005-60,000, 2025).

Is the model accurate?

- All that can be said is that the two previous studies of global mobility have been very accurate over 5-10 year periods.
- The model may under-estimate developed country mobility. The choice factors may be related to lifestyle and not the need to seek an education elsewhere.
- The model does not take into account non tertiary mobility.

The view from Australia

- Australia 6.5% market share
- Predicted growth 3-4% over period to 2025.
- China and India at 80%.
- 56% of students via agents.
- Supply side issues beginning to emerge. Will this impact the number of students-NO.
  - Innovative solutions are and will be found
- Comprehensive visa and consumer protection in place.
- The Australian Govt is pushing a line that in the future there will be less of a focus on recruiting as against other aspects of internationalisation.
- Some universities at more that 30% of teaching load-12,000+international students
- The program is closely tied to skilled migration-is this justifiable?
- Approximately 17% load is international students.
- Exchange is currently balanced with an average of just under 6% of the graduating cohort having a mobility experience.
- Student mobility is essentially North-North.