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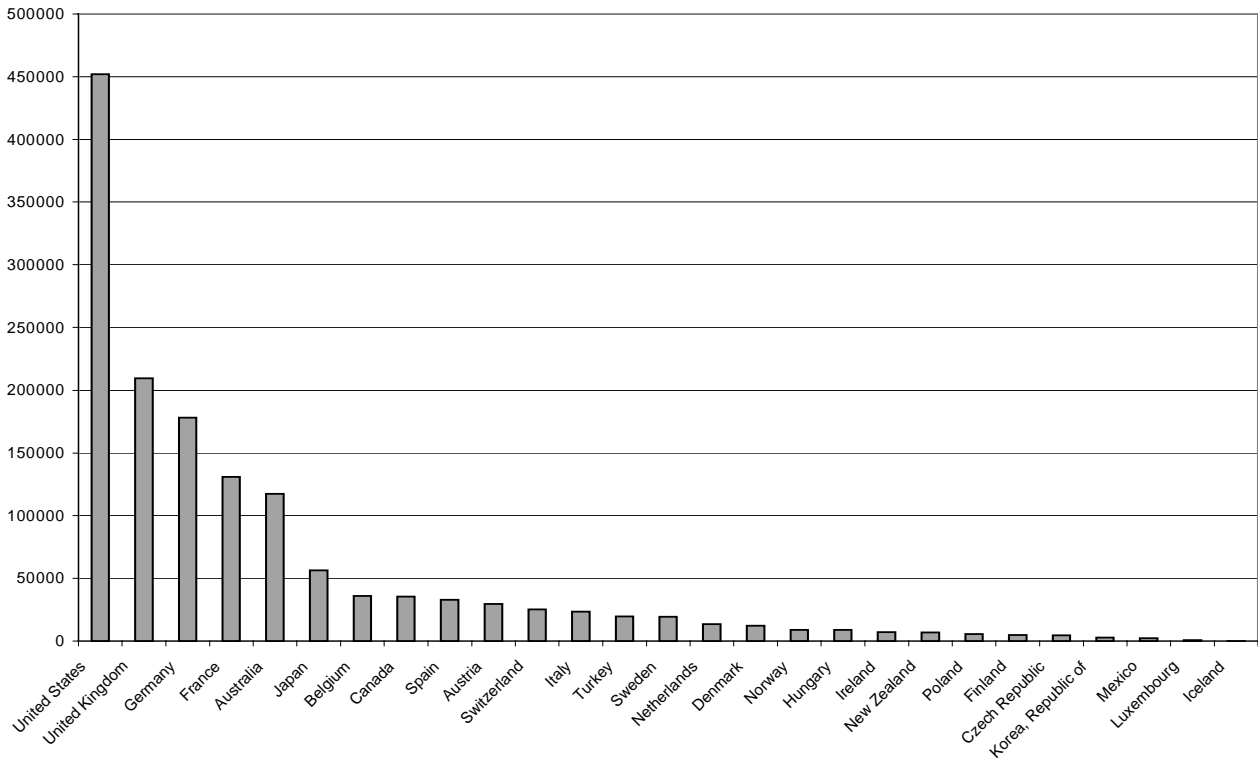
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Figure 5: International students in Australian universities by mode of study (Semester 2, 1996-Semester 2, 2001)

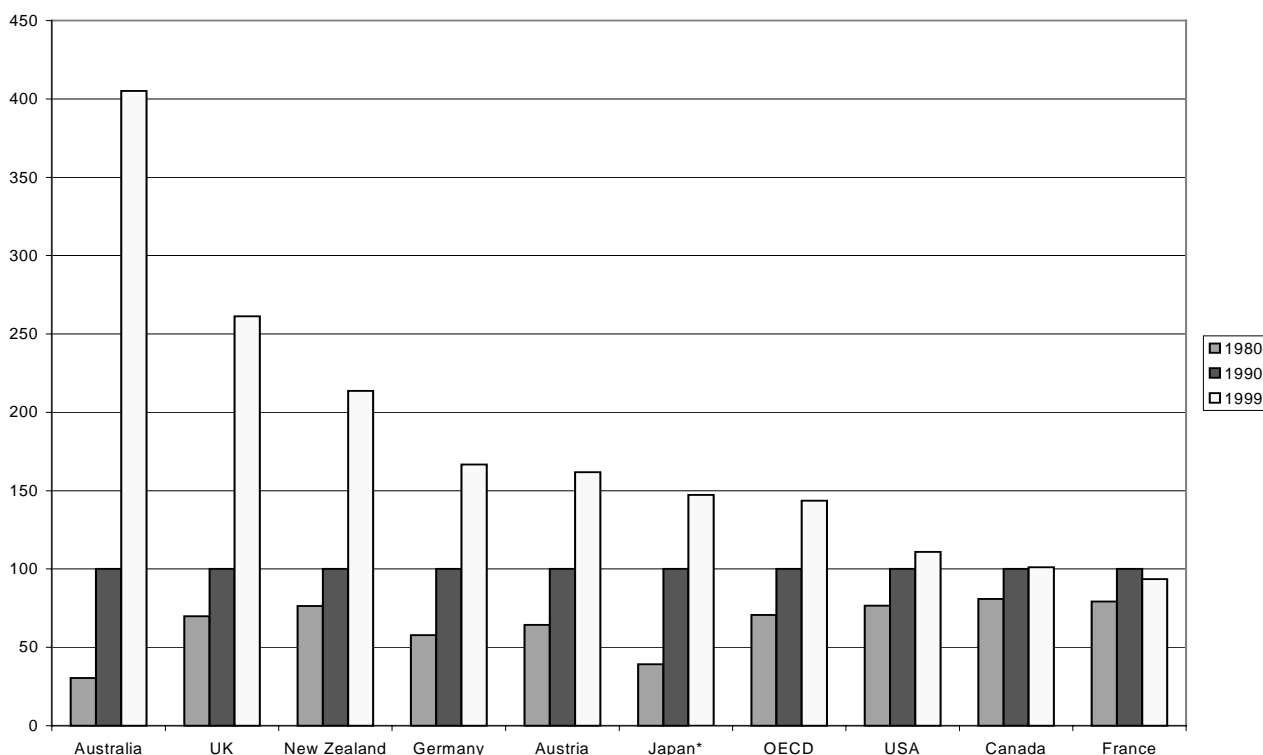
Figure 1: Number of foreign students in tertiary education in OECD countries by host country (1999)



Source: OECD Education Database

- 1.5 million foreign students in OECD countries, of whom 56% are from non-OECD countries;
- 85% of all foreign students in the world study within the OECD area;
- Altogether, the USA, the UK, Germany, France, Australia and Japan attract more than 75% of all foreign students in the OECD area;
- The Russian federation (6th), Ukraine (12th) and Lebanon (13th) are the only major non-OECD receiving countries (data are not available for China).

Figure 2: Increase of tertiary foreign students in OECD countries 1980-1999 (1990 = 100)



Source: Unesco for 1980 and 1990, except for Japan (Ministry of Education); OECD for 1999

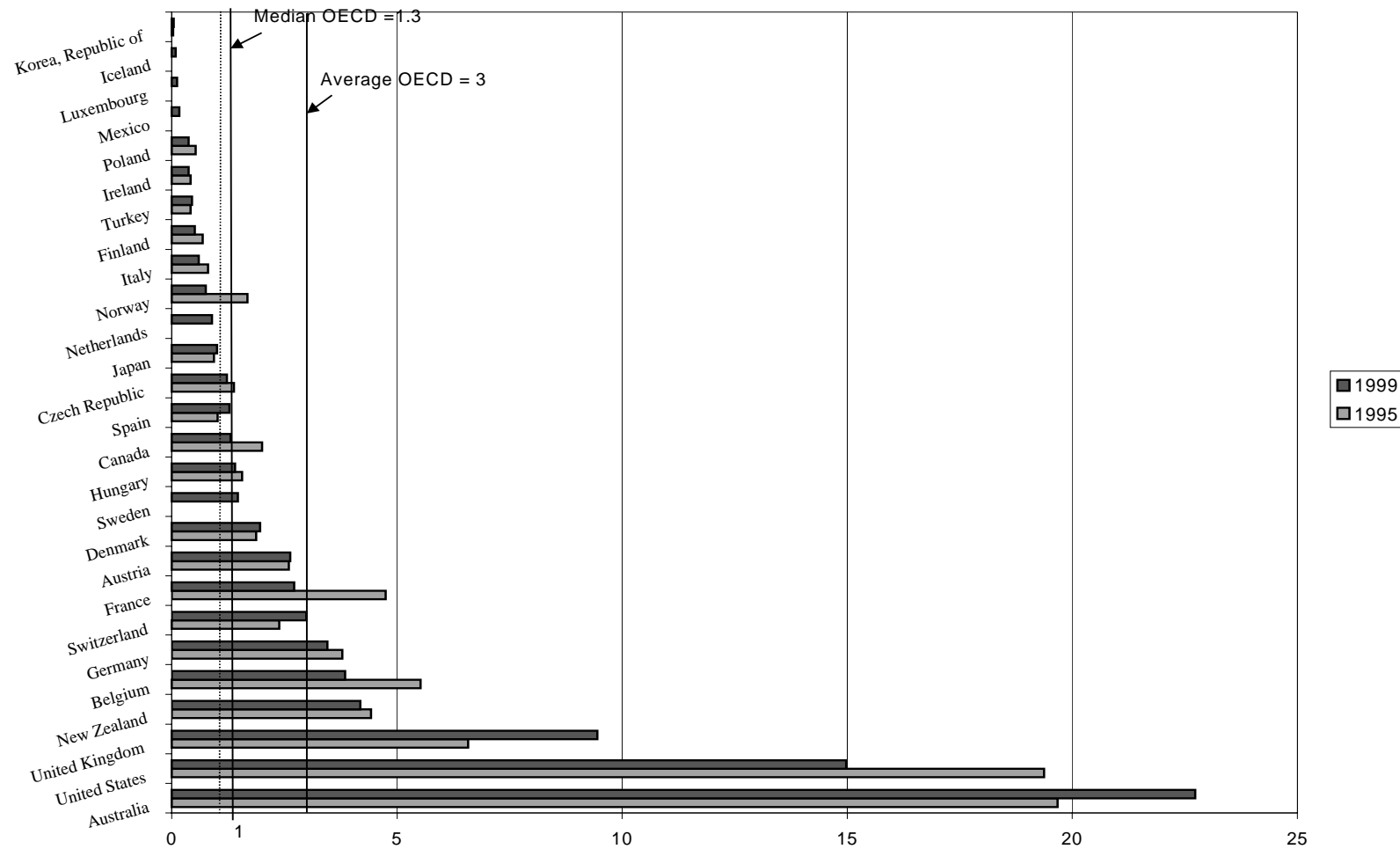
- Number of post-secondary foreign students in OECD countries has doubled over the past twenty years;
- Dramatic rise of Australia (only entrant in the 8 leading countries over the past 20 years);
- Relative decline in France, Canada and the USA;
- Share of the 8 top receiving countries has decreased to the benefit of no specific countries between 1995 and 1999;
- Large number of small receivers.

Table 1: Number of tertiary foreign students in OECD countries from the 30 top sending countries (1999)

		Number of students sent to OECD countries	Share of tertiary students abroad within the OECD area
1	China	98813	7%
2	Korea	69840	5%
3	Japan	63340	4%
4	Greece	57825	4%
5	Germany	52239	4%
6	France	48764	3%
7	India	48515	3%
8	Turkey	44009	3%
9	Malaysia	40873	3%
10	Italy	39487	3%
11	Morocco	36504	3%
12	Hong Kong China	32476	2%
13	USA	32122	2%
14	Indonesia	30741	2%
15	Canada	27181	2%
16	Spain	25809	2%
17	Singapore	24504	2%
18	United Kingdom	23136	2%
19	Thailand	21337	1%
20	Ireland	19100	1%
21	Russia	18574	1%
22	Algeria	16490	1%
23	Netherlands	15351	1%
24	Poland	15341	1%
25	Brazil	14475	1%
26	Sweden	14036	1%
27	Mexico	13585	1%
28	Norway	12806	1%
29	Austria	11437	1%
30	Pakistan	10229	1%

- Most foreign students studying in the OECD area are from Asia (45% of all foreign students in 1999), then from Europe (34%);
- Main senders to OECD countries outside the OECD area: China (7%), India (3%), Malaysia (2%), Hong Kong China (2%) and Southeast Asian countries (5%);
- Main senders to OECD countries within the OECD area: Greece, Japan, Korea (all around 4-5%), then Germany, France, Turkey and Italy.

Figure 3: Number of foreign post-secondary students per domestic student abroad by country



Source: OECD Education database

- Australia, the USA, the UK and New Zealand are the (potential) top trade balance earners;
- Countries that are “net-senders” of students are generally small, have a post-secondary education system with high student fees and/or have an emigration tradition.

Table 2:

Share of foreign tertiary students studying abroad in OECD countries by region of origin

	1995				1999			
	OECD countries in				OECD countries in			
	Europe	EU	America	Asia-Oceania	Europe	EU	America	Asia-Oceania
Europe	77%	69%	21%	2%	82%	74%	15%	2%
EU	78%	70%	21%	1%	84%	77%	15%	2%
America	34%	32%	62%	4%	40%	38%	55%	5%
Asia-Oceania	25%	23%	53%	22%	29%	27%	46%	25%
OECD	50%	46%	39%	11%	54%	49%	34%	13%

Read : 77% of foreign students from all Europe were studying abroad in European OECD countries in 1995, 62% of foreign students from (North and South) America were studying in American OECD countries in 1995, etc.

- Increasing “regionalisation” of student mobility in Europe and in Asia-Oceania but not in America between 1995 and 1999. Europe and America are however more “regionalised” than Asia-Oceania.

Table 3:
Share and destination of origin of tertiary foreign students
in the 6 OECD anglophone countries (1995-1999)

	USA		UK		Australia		Canada		New Zealand		Ireland		Total	
	1995	1999	1995	1999	1995	1999	1995	1999	1995	1999	1995	1999	1995	1999
Asia/ Oceania	48	44	7	11	13	16	5	2	1	1	0	0	74	74
America	56	49	9	15	1	3	6	5	0.2	0.3	1	1	73	72
Europe	19	14	17	24	1	2	2	2	0.1	0.1	1	1	39	41
EU	16	12	20	28	1	1	5	2	0.1	0.1	1	1	42	44
OECD	34	31	12	14	7	8	4	2	0.4	0.5	0.4	0.5	58	56

Read : 48% of foreign students coming from Asia and Oceania were studying in the USA in 1995, etc.

- Four top Anglophone countries account for 55% of all foreign students in OECD countries, with a fairly stable share of the market over the last few years;
- Relative decrease of USA (3%) and Canada (2%) between 1995 and 1999;
- Relative increase of UK (2%) and Australia (1%) between 1995 and 1999;
- Anglophone countries attract most Asian (often full fee-paying) students.

Table 4:
International students' choice of field study compared with domestic students' choice of field study
(1999)

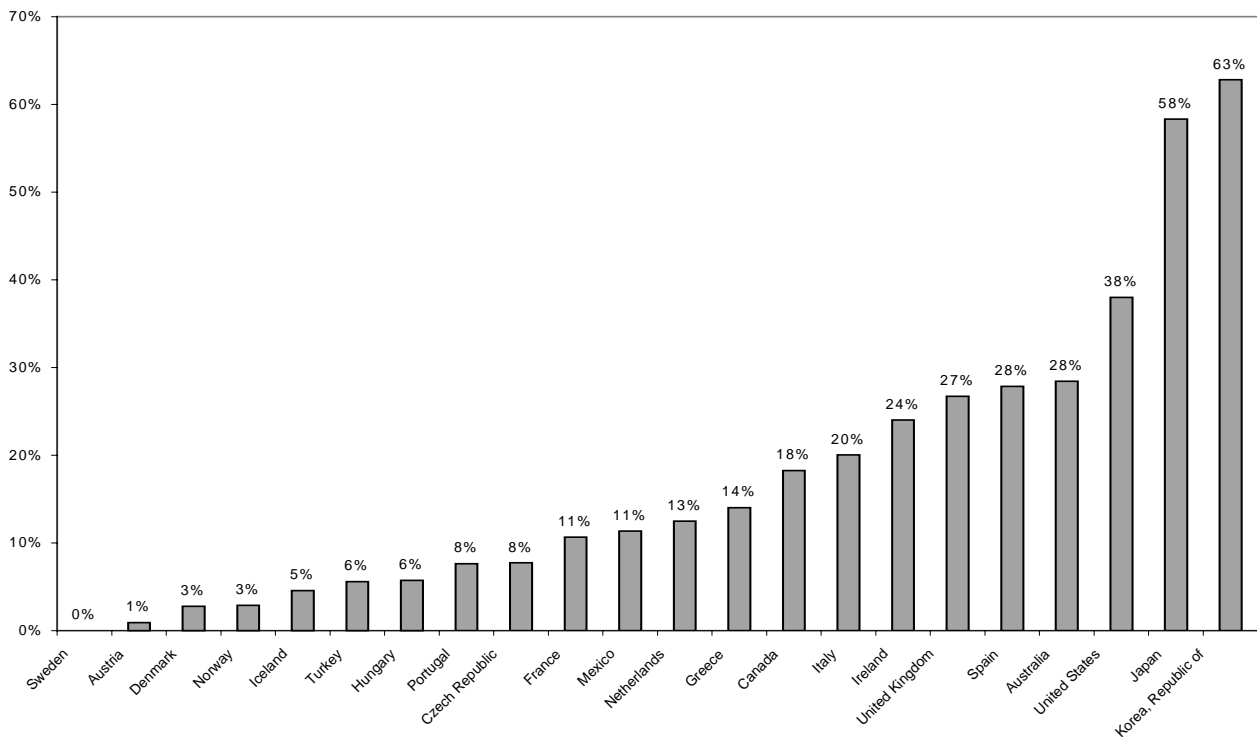
	Education (ISC 14)	Humanities and Arts	Social sciences, business and law	Science	Engineering, manufactory ng and construction	Health and welfare
Canada	0.33	1.00	0.99	1.37	1.72	0.90
Denmark	0.33	0.99	0.88	0.83	1.48	1.31
Czech Republic	0.09	1.41	1.13	0.80	0.56	4.99
Finland	0.51	1.56	0.87	0.99	1.01	0.77
Germany	0.55	1.28	0.97	0.90	1.15	0.81
Hungary	0.54	1.49	0.43	0.51	1.04	3.66
Iceland	0.38	3.73	0.48	0.99	0.32	0.47
Italy	0.58	1.01	0.62	0.84	0.78	3.19
Japan	0.67	1.17	0.87	0.68	0.89	1.23
Netherlands	0.57	1.48	1.05	1.17	1.28	0.89
Norway	0.52	1.40	0.93	1.41	0.98	0.82
New Zealand	0.39	0.57	1.72	0.92	1.07	0.60
Austria	0.54	1.96	0.82	0.95	1.03	1.10
Poland	0.70	2.26	0.78	0.49	0.62	9.12
Sweden	0.46	1.18	1.09	1.19	0.95	1.09
Switzerland	0.48	1.18	1.00	1.28	1.10	0.55
UK	0.51	0.89	1.34	0.83	1.72	0.68
Australia	0.34	0.53	1.54	1.04	1.22	0.72

Source: OECD Education database

Read: Index 1 represents the index for which the percentage of international students in a field of study is the same as the percentage for all students in the same field by country; the higher the index, the more international students choose to study in the particular field compared to all students in the given country.

- In Anglo-saxon countries, international students are far more attracted than domestic students by business and administration as well as by engineering studies. In the USA, 20% of all foreign students study in business and management whereas 15% of them study in engineering;
- International students always study far less than average in education, generally slightly less than average in science, more than average in humanities and arts and generally less than average in health (except in Poland, Hungary and Italy);
- Compared to domestic students, a higher share of international students study at postgraduate level. In the UK, 9% of British students study at postgraduate level, against 26% for EU students and 41% for overseas students. In the USA, about 17% of all students are postgraduates as compared to 45% for international students.

Figure 4:
 Percentage of direct educational expenditures for higher educational institutions
 coming from students' households (1998)



Source: OECD Education database

- The extent to which students contribute to the direct costs of providing higher education differs markedly across OECD countries, the proportions ranging from 0% to 63%;
- Domestic students in Norway and Denmark have a legal right to spend their governmental study grants and loans in any international educational institution;
- Japanese and Korean students, which make up relatively high proportions of the foreign students studying in other OECD countries, contribute much more to the direct costs of providing higher education than most students from other OECD countries.

Table 5: Exports of educational services in \$US million and as a percentage of total exports in services, 1970-2000 (in current prices)

	1970		1989		1997		2000	
	\$US million	% total services	\$US million	% total services	\$US million	% total services	\$US million	% total services
Australia	6	0.6	584	6.6	2190	11.8	2155	11.8
Canada	68	2.7	530	3	595	1.9	796	2.1
Mexico	52	0.5	29	0.2
New Zealand	280	6.6	199	4.7
Poland	16	0.2
United Kingdom	2214	4.5	4080	4.3	3758	3.2
United States	4575	4.4	8346	3.5	10280	3.5
Greece	80	0.4
Italy	1170	2.1
Brazil*	4	0.1	4	0.0
Venezuela*	4	0.3	60	4.9

Note: .. not available; Data refers to foreign tertiary students, except for Australia, Italy and New Zealand, where foreign primary, secondary, post-secondary vocational training and language training students are included.

Source: OECD statistics on trade in services and *IMF (+ Italy, USA : 2000; Poland: 1999); UK (1999, 2000): Office for National Statistics

- The USA is by far the main exporter of education services, followed by the United Kingdom, Australia, Italy and Canada (for the countries for which data are available);
- Estimated size of the global market of education services under mode 2: \$US 30 billion, i.e. 3% of the international trade in services in OECD countries;
- Education services were the 3rd largest service sector export earner (and the 14th largest overall export industry) in Australia in 2000-2001;
- Education services were the 4th largest service sector export earner (and the 15th largest overall export industry) in New Zealand in 2000.

Table 6: Imports of educational services in \$US million and as a percentage of total exports in services, 1970-2000 (in current prices)

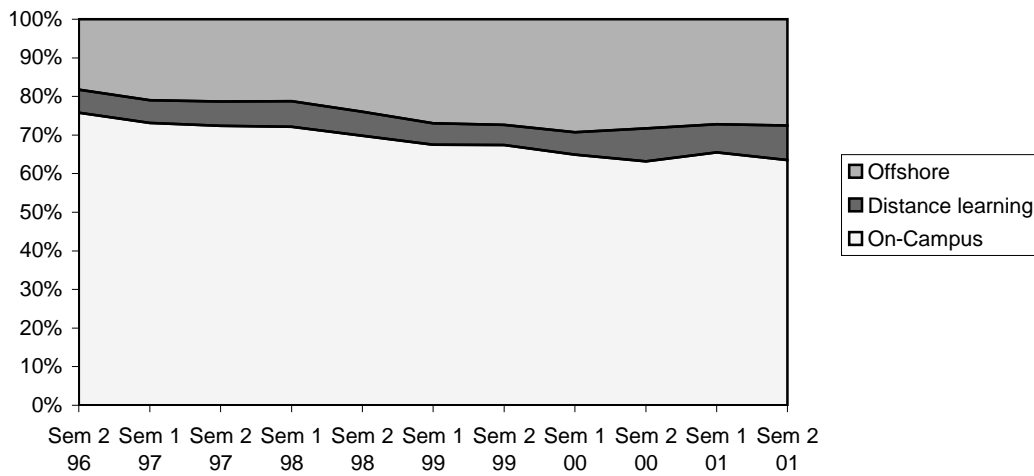
	1970		1989		1997		2000	
	\$US million	% total services	\$US million	% total services	\$US million	% total services	\$US million	% total services
Australia	24	1.5	178	1.3	410	2.2	356	2.0
Canada	37	1.1	258	1.1	532	1.4	602	1.4
Mexico	44	0.3	53	0.3
Poland	41	0.7
United Kingdom	67	0.2	182	0.2	150	0.2
United States	586	0.7	1396	0.9	2150	1.0
Greece	211	1.9
Italy	849	1.5
Brazil*	22	0.1	78	0.5
Venezuela*	165	3.0	113	2.7

Note: .. not available; Data refers to foreign tertiary students, except for Australia, Italy and New Zealand, where foreign primary, secondary, post-secondary vocational training and language training students are included.

Source: OECD statistics on trade in services and *IMF (+ Italy, USA : 2000; Poland: 1999); UK (1999, 2000): Office for National Statistics

- US is the largest importer, followed by Italy, Canada and Australia (for the countries for which data are available);
- Venezuela, Australia, Greece and Italy are the largest importers of education services expressed as a percentage of total service imports.

Figure 5:
International students in Australian universities by mode of study
Semester 2, 1996-Semester 2, 2001



Source : IDP Australia

- Increase of the share of international students studying in Australian post-secondary institutions through distance and offshore programmes from 18 to 35% between 1997 and 2001;
- More than half of international students from Singapore and Hong Kong studying in an Australian educational institution are enrolled in offshore courses;
- British offshore programmes enrolled around 140,000 students in 1996-97 (as compared to 199,000 international students in the UK tertiary level the same year);
- The UK and Australia are the major actors in this field, but Canada, South Africa, the USA and China endeavour to become more active.