



Globalisation, Market forces and the Future of Higher Education

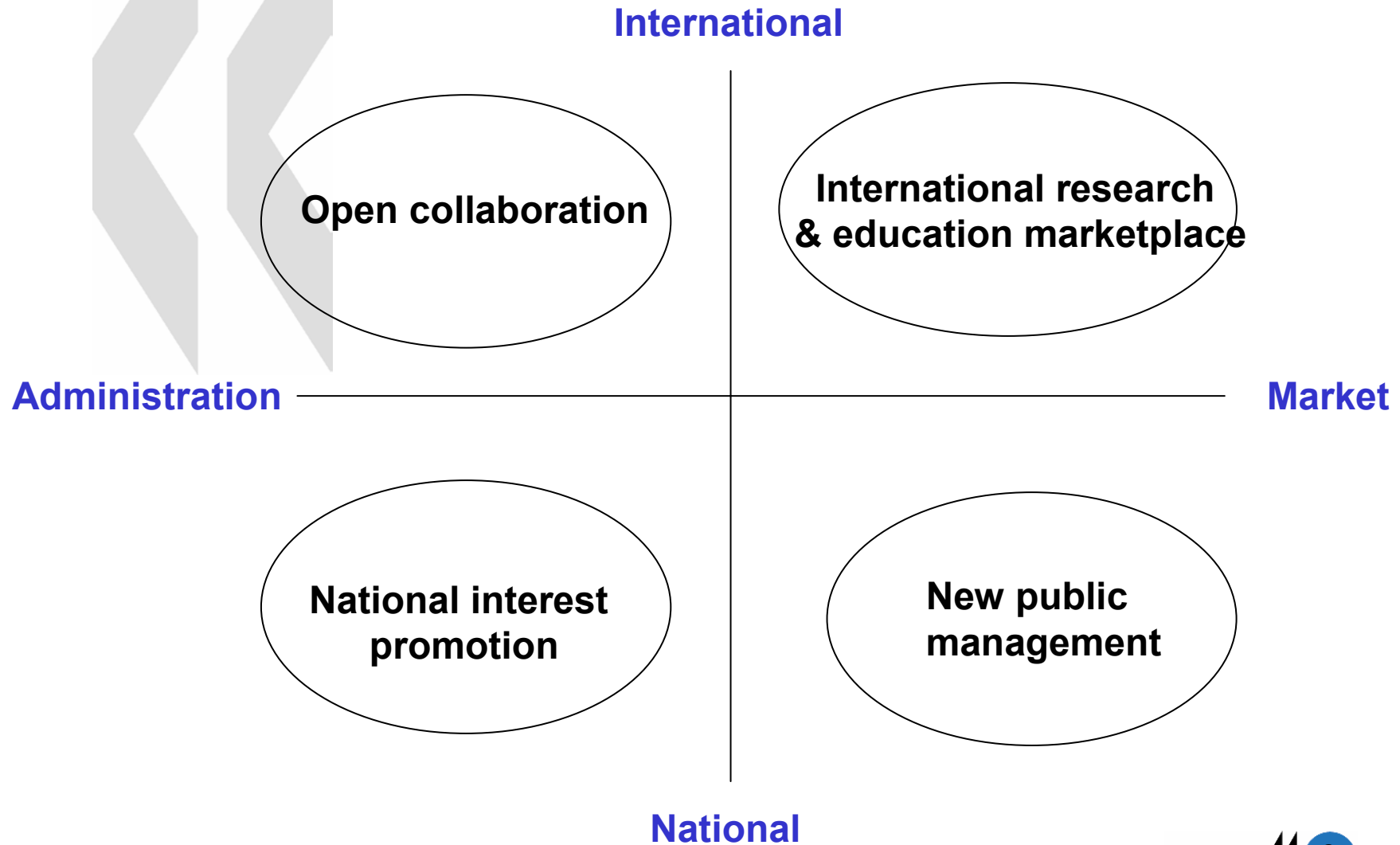
CERI expert meeting
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OECD/CERI

Analytical and thematic study

- Technology
 - E-learning in tertiary education, Cyber-infrastructures, gaming & education, OER, new millenium learner
- Demographic change
 - General trends in society (ageing, migrations, development of demographic giants, etc.), change in the number and type of students, staff demographics
- Financing, market forces and globalisation
 - Internationalisation and trade in higher education, rise of market forces, competition, international rankings, harmonisation
- University research
- Changing labour market demand & higher education

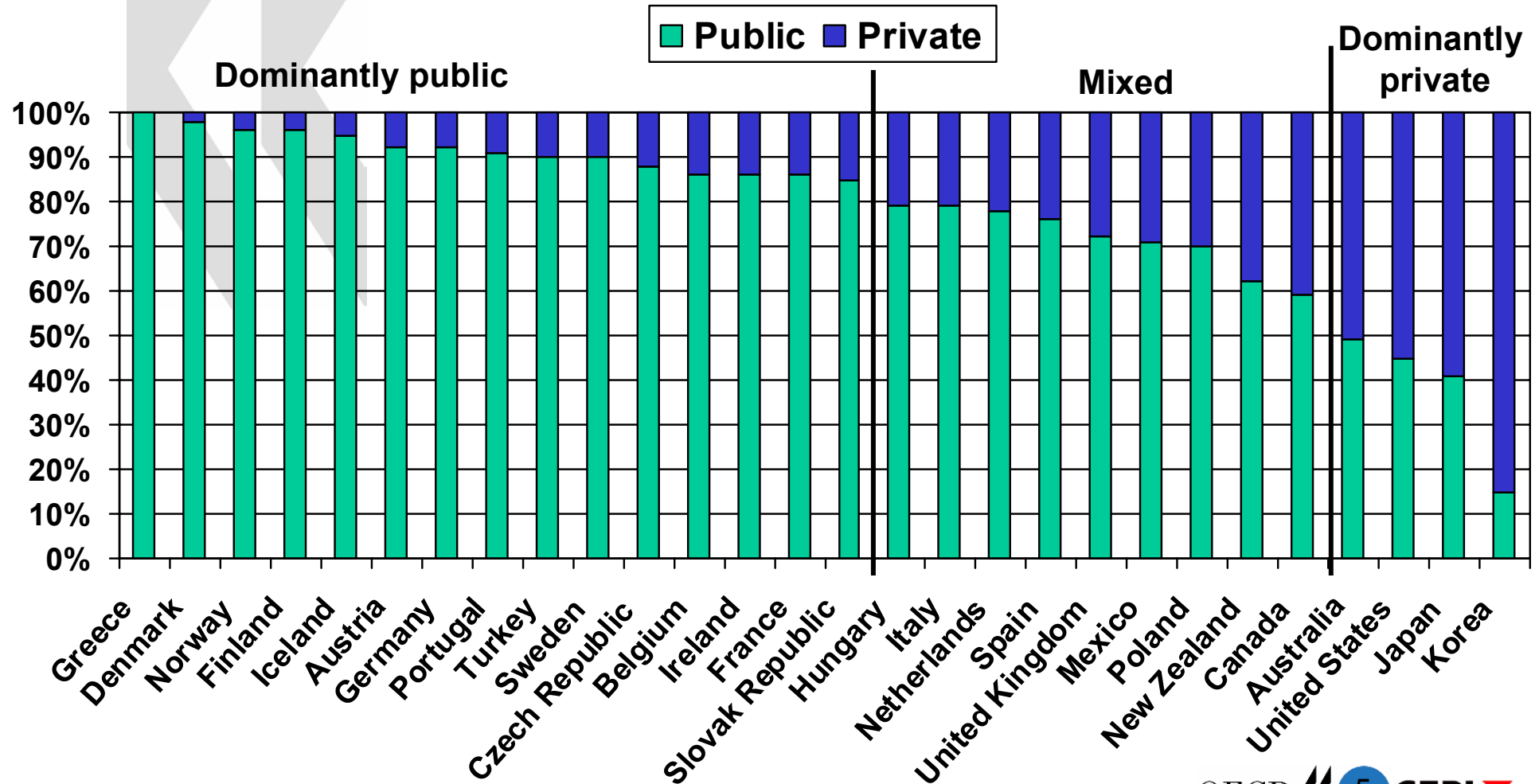
Provisional set of scenarios



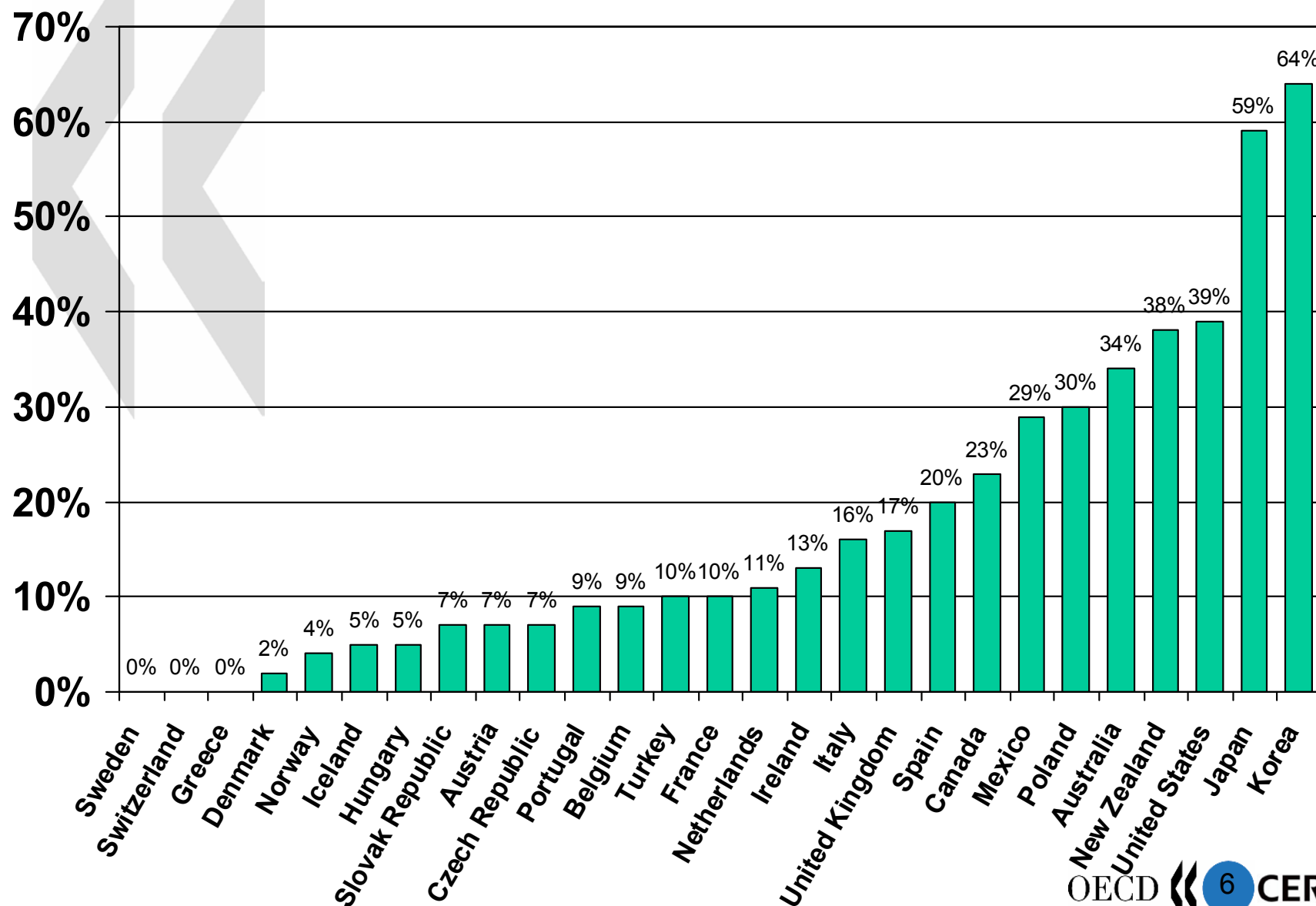


Market and quasi-market developments

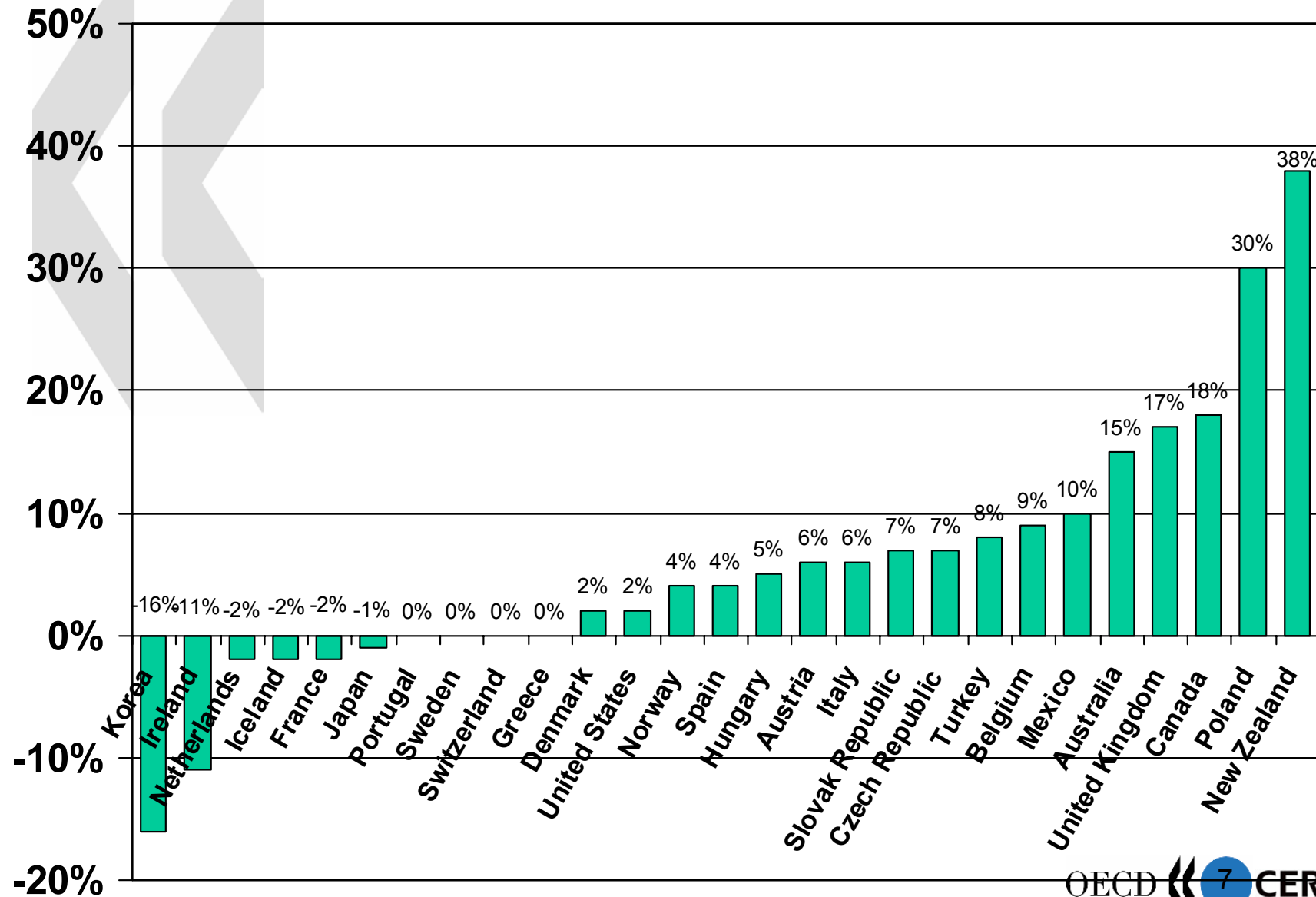
Public-private funding (2002)



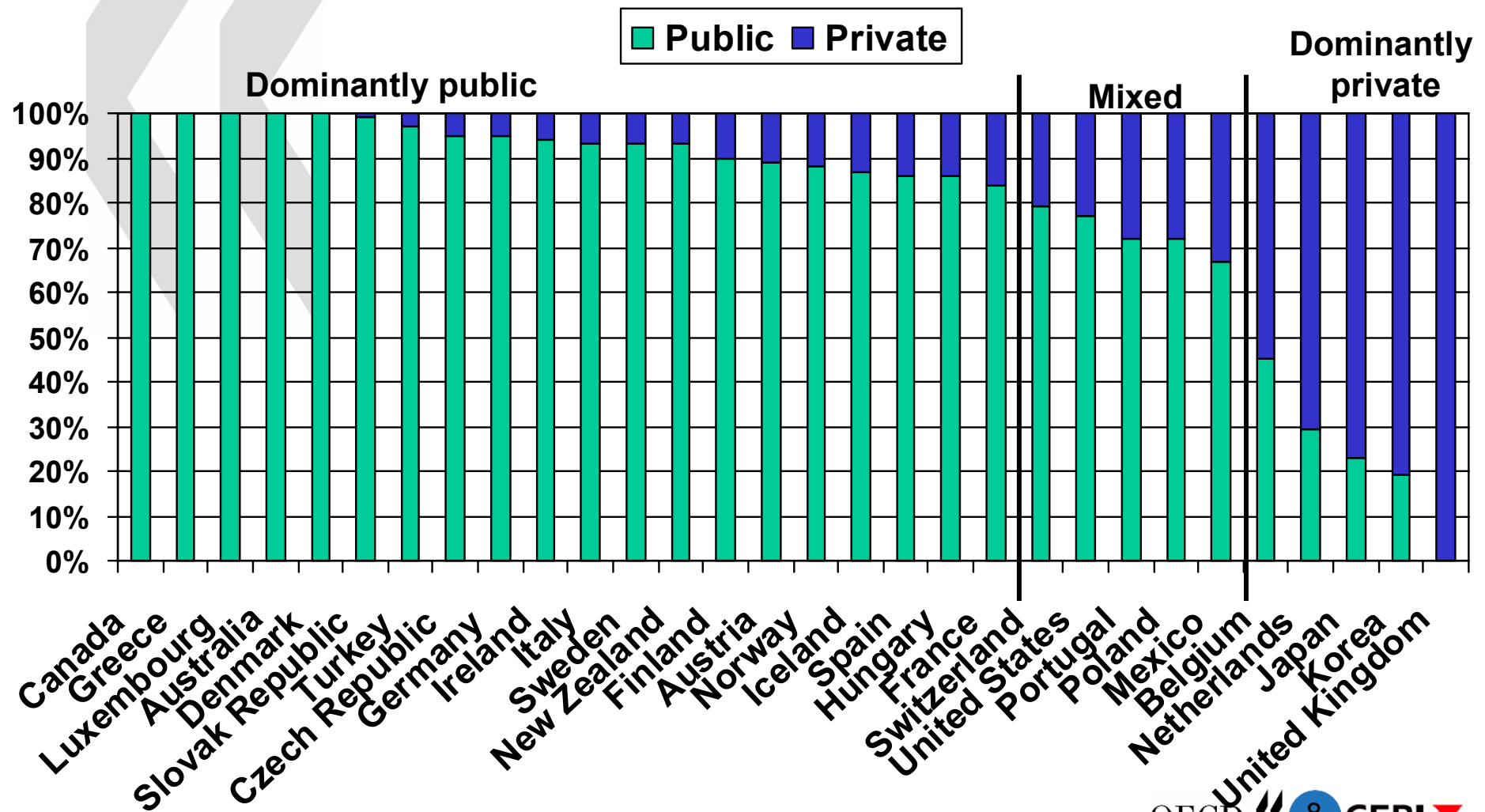
Share of household expenditures in direct expenditures to tertiary educational institutions (2002)



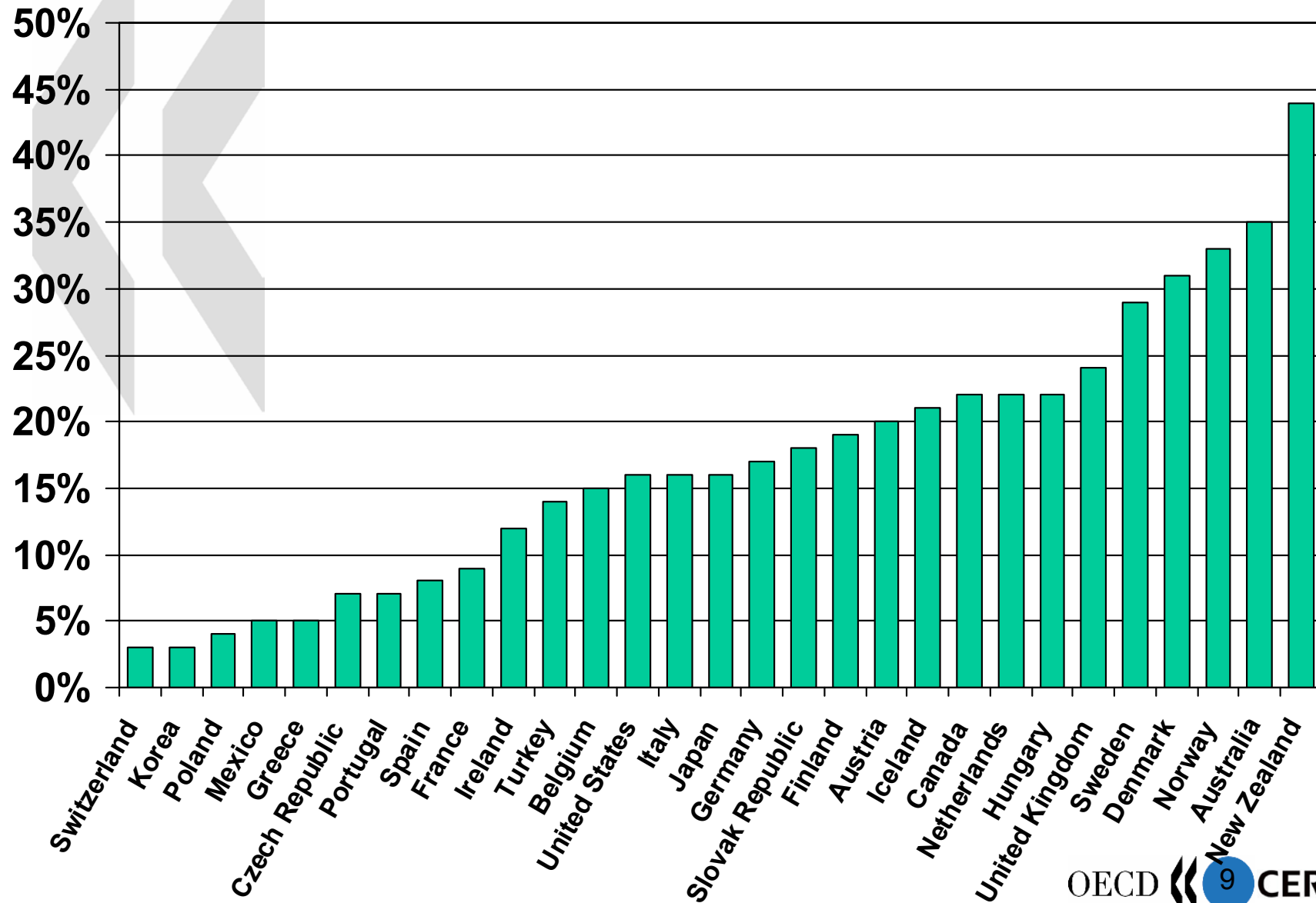
Change in share of household funding of tertiary educational institutions (1992-2002)



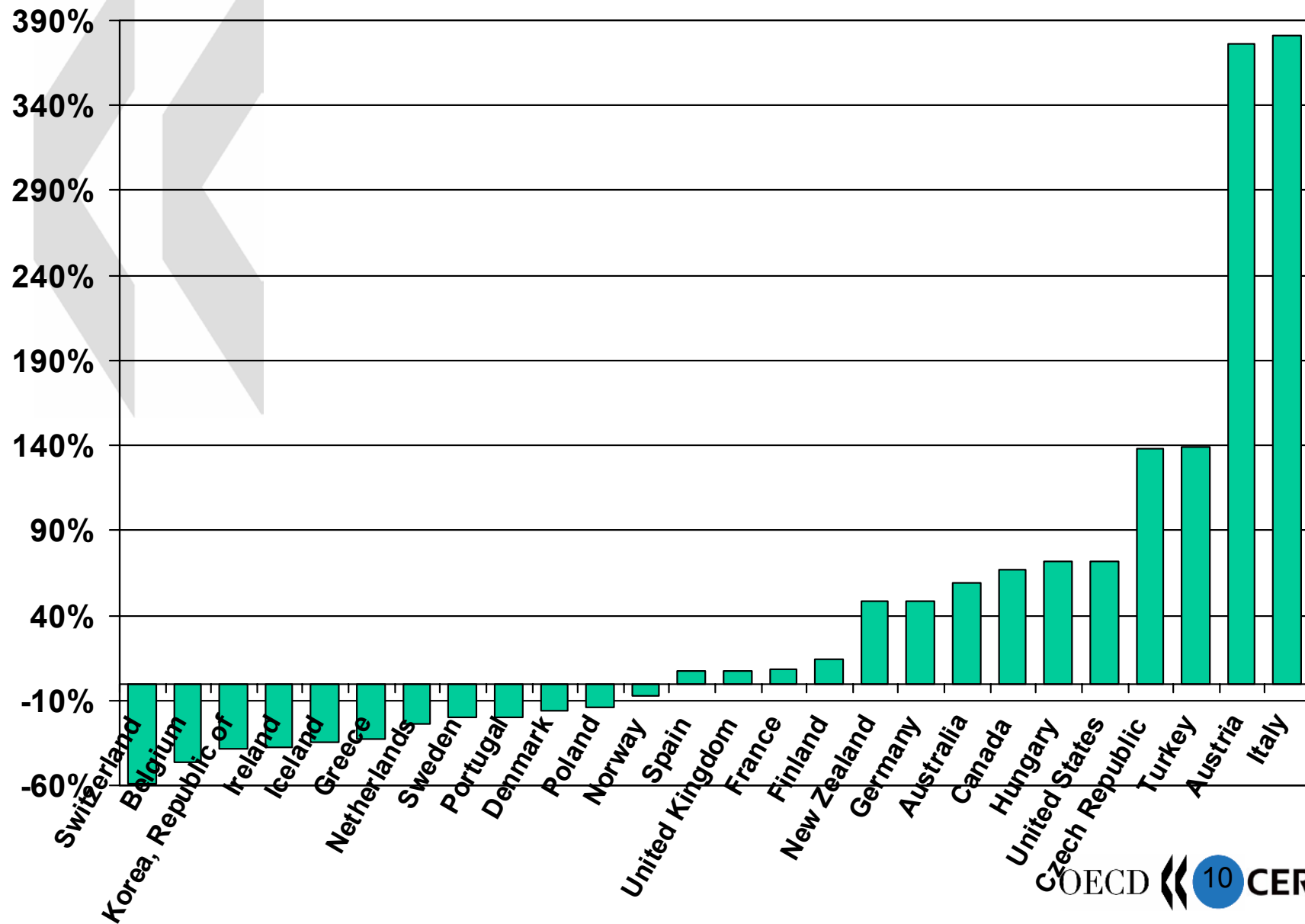
Share of enrolments in public and private institutions (2002)



Share of indirect spending in government funding of higher education (i.e. not to institutions) (2002)



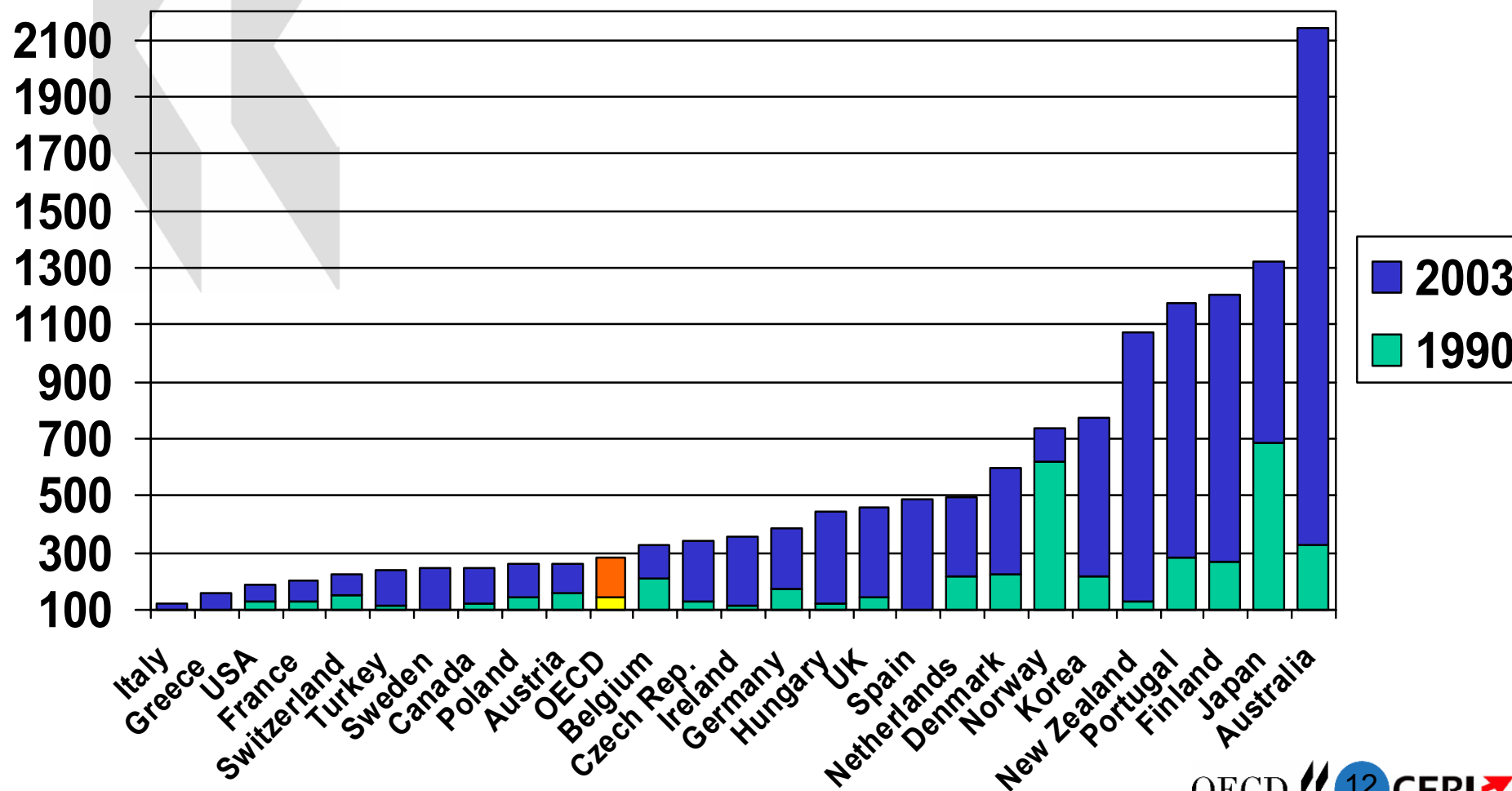
Change in share of indirect spending in government funding of higher education (1992-2002)





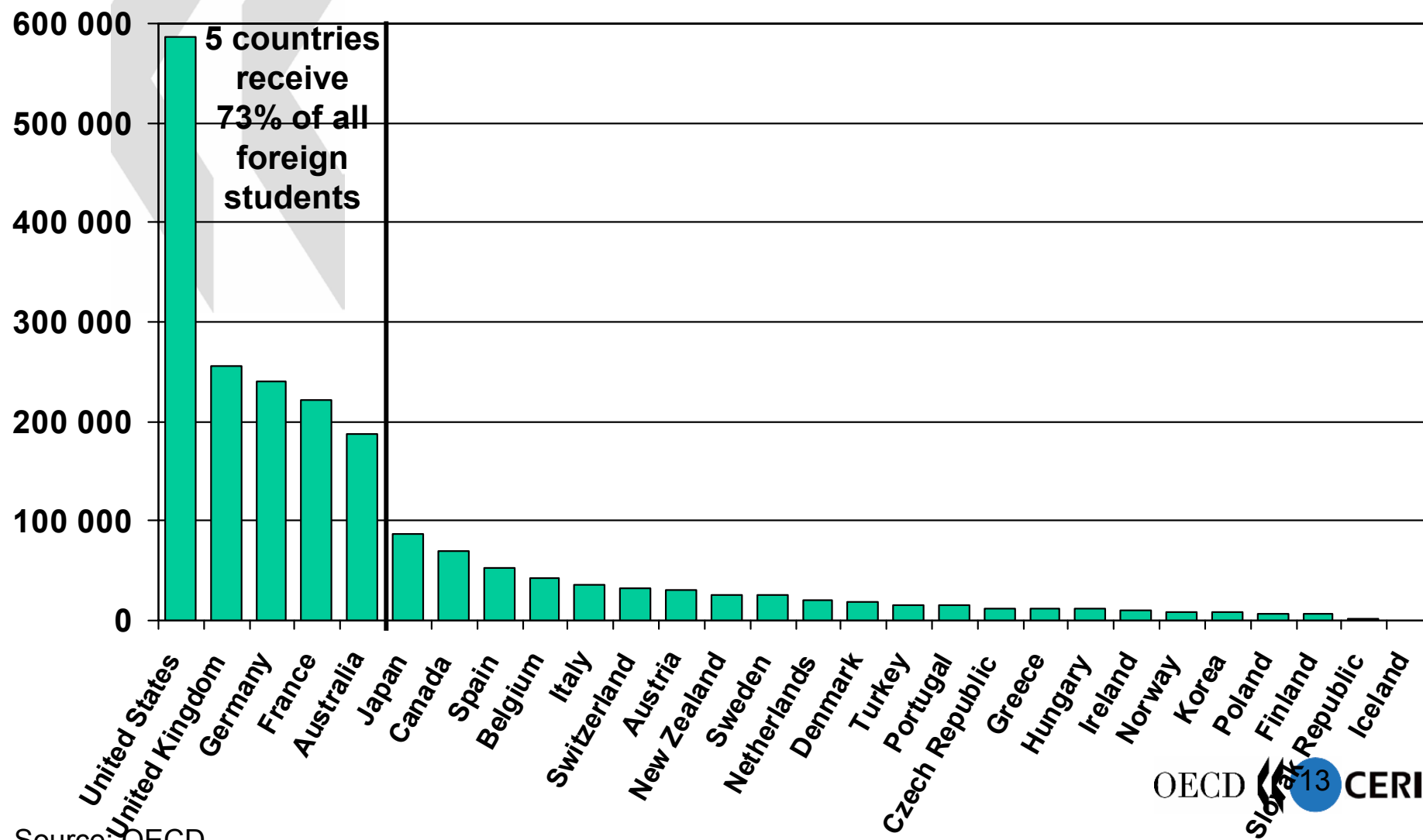
Internationalisation and globalisation

Growth of foreign student enrolments in OECD countries 1980-2003 (1980=100)



Source: OECD and Unesco

Foreign tertiary students in OECD (2003)



Source: OECD

OECD

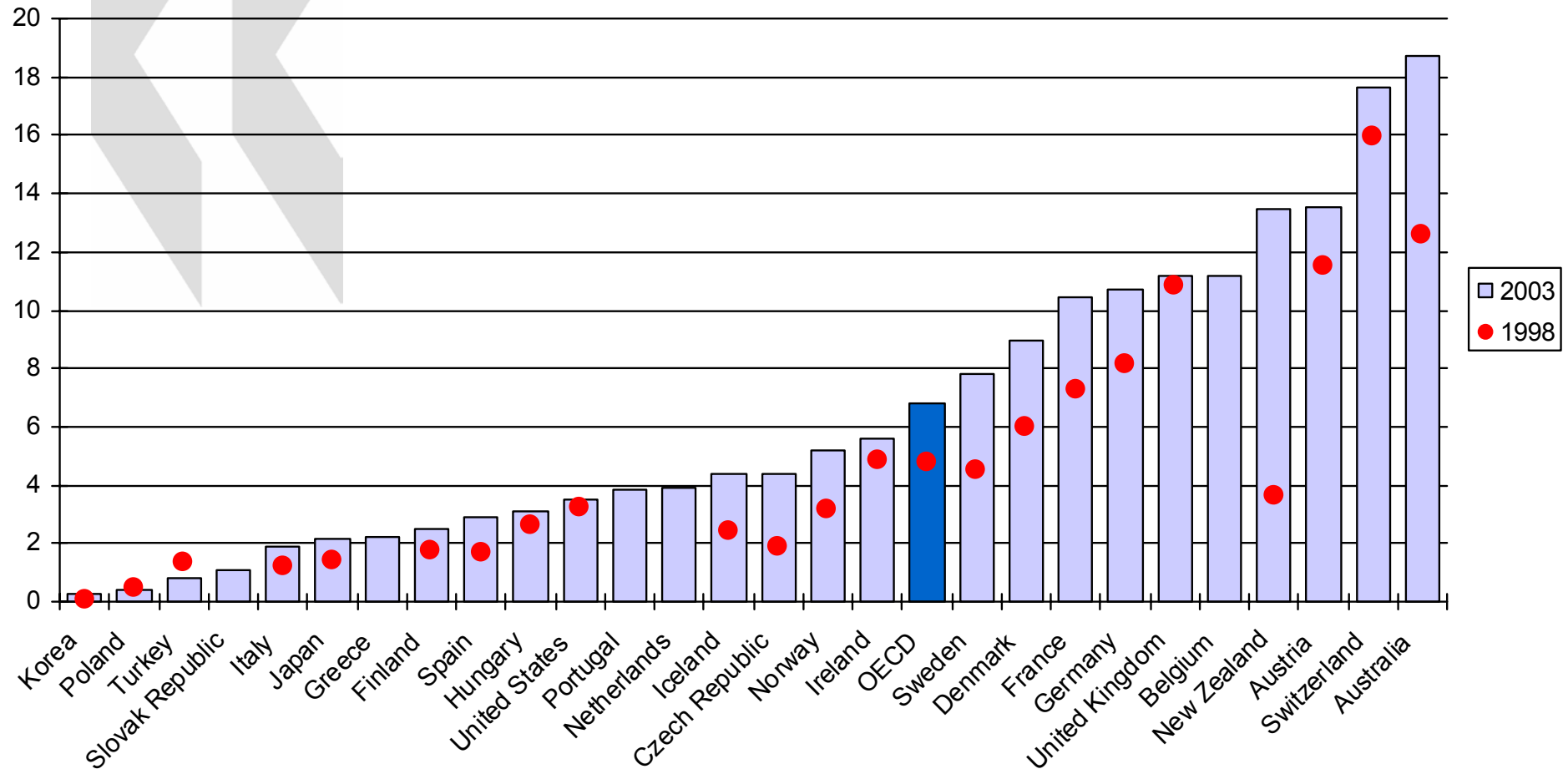


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Percentage of foreign students in tertiary education (1998, 2003)



Origin of foreign students in the OECD area (2003)

OECD receiving countries in	North America	Europe	Asia-Pacific	OECD
From Africa	17%	79%	4%	12%
From N. America	50%	40%	10%	6%
From S. America	48%	48%	4%	4%
From Asia	41%	30%	29%	45%
From Europe	13%	82%	5%	30%
From Oceania	28%	26%	46%	1%
From WORLD	33%	54%	13%	

Source: OECD

International mobility of academics

- United States
 - 84 281 international scholars in 2003: an increase by 40% since 1994
 - Foreign scholars were estimated to represent 30 to 40% of total university researchers
- Europe
 - No systematic evidence, but the academic mobility through the EU Socrates programme has increased by 71% between 1997 and 2000 (to 12 000 scholars)
- Asia
 - Korea: 1390 foreign academics in 2003, ie over a 3-fold increase compared to 1990
 - Japan: 66% increase between 1993 and 2003 (to ca. 5000 foreign academics)

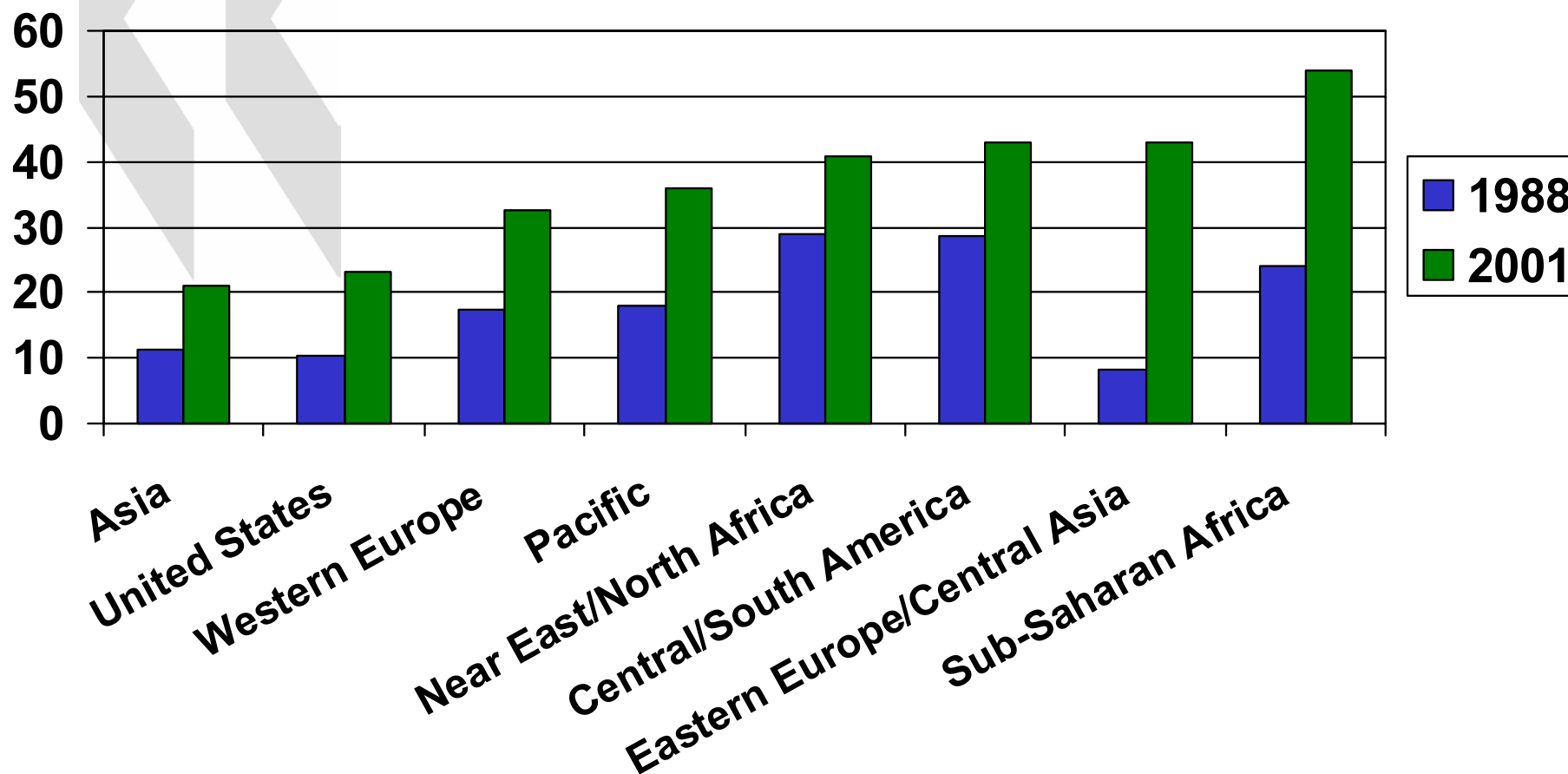
International mobility of programmes and institutions

- Educational programme and institution mobility is still limited in scale but grows rapidly, especially in the Asia-Pacific region
 - 33% of all international students enrolled in Australian institutions studied from their country in 2004 (against 24% in 1996 and 37% in 2001)
 - Singapore: more undergraduate students accessed a foreign programme from Singapore than studied abroad in 2000
 - China: 9-fold increase in foreign programmes between 1995 and 2003

Rise of commercial cross-border provision

- Student mobility generated about USD 40 billion in 2003 (living and travel expenditures + tuition fees)
- Academic partnerships remain widespread, but commercial arrangements gain ground in the Asia-Pacific region
 - Franchising, course validation, etc.
 - Twinning arrangements
 - Branch campuses
- Growing tendency to charge foreign students more than domestic students (« full » tuition fees)
- Inclusion of education services in the GATS and other trade agreements

Percentage of international collaborative scientific articles, by region (1988, 2001)



Relative prominence of citations of scientific literature, by region (1988, 2001)

