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Trade in Educational Services: Exploring priorities

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Modes of supply of educational services

Mode of supply	Example	Potential for Australian export
Mode 1: Cross-border supply	An Australian provider delivers an on-line course offshore	Great potential for growth, but market demand is not strong.
Mode 2: Consumption abroad	An international student travels to study and live in Australia	Largest services export for Australia with domestic regulation having the biggest influence on its scale.
Mode 3: Commercial presence	An Australian provider establishes a presence offshore	Limited success and modest growth to date.
Mode 4: Movement of natural persons	Australian teachers work as contractors or employees offshore (<12 months)	Anecdotally, this is a very active area though difficult to quantify.



AU – EU educational services trade

EU

- 55,185 EU students enrolled in AU, 2018
- Most popular sector: Vocational Education & Training
- Largest source country: Italy
- Enrolments down 2% on 2017

World

- 876,399 (all) international student enrolments, 2018
- Most popular sector: Higher Education
- Largest source country: China
- Enrolments up 10% on 2017



AU – EU educational services trade

AU students in EU

- 13,644 AU (uni) students in the EU in 2017 (from a global total of 49,263).
- UK most popular destination, then Italy, Germany & France

EU students in AU

- 1,690 EU students in AU offshore higher education courses (from a global total of 119,351).
- Top student countries were Austria, Germany, France and UK.
- Revenue estimated to be \$382 million in 2014.

Student mobility: consumption abroad

- Mutual recognition of qualifications
- Course accreditation requirements
- Visas – for study and after
- Work rights, during and post-study
- Education exchange programs
- Internationalising a domestic curriculum

Key issues for discussion

- Mutual recognition
- Vocational and technical
- Impediments to delivery into Europe
- Packaging educational services

Offshore education: cross-border supply, commercial presence & movement of persons

- Mutual recognition of qualifications
- Establishing offshore branch campuses
- Partnerships with foreign providers
- Visas for teachers
- Online course delivery – now and future
- International competition in English language based courses