What does our digital future have in store for education?

Connecting a global community of professionals in international education
Five big themes, quickly
A quick overview of where we are:

- Rising competition and government agendas to increase international student intake
- The US and UK are losing market share while China is gaining – but the market is wide and fragmenting
- Demographic and academic infrastructure issues means global student mobility expected to grow
- 2001 - 2018. Growth from 2.1 to 5 million outbound (Project Atlas)
Domestic funding challenges

• UK – Augar review. Fees unis can charge is expected to drop to £7.5K

• Australia, Canada – similar challenges
Strategies launched since 2014
All eyes on China
China’s importance. 608,000 outbound in 2017.
US-China tensions
Returning international grads to China

US: Chinese students trapped in visa limbo as applications delayed

At least 100 Chinese international students who visited their home country during a 2018 school break have not been able to return to their studies in the US due to their visa applications being caught up in lengthy delays and "administrative processing" by the US State Department.

The Value of U.S. College Education in Global Labor Markets: Experimental Evidence from China*

Mingyu Chen
April 15, 2019

Abstract
One million international students study in the U.S. each year and the majority of them compete in global labor markets after graduation. I conduct a large-scale field experiment to study how employers in China value U.S. college education. I sent over 27,000 fictitious online applications to business and computer science jobs in China, randomizing the country of college education. I find that U.S.-educated applicants are on average 18 percent less likely to receive a callback than applicants educated in China, with applicants from very selective U.S. institutions underperforming those from the least selective Chinese institutions. The U.S.-China callback gap is smaller at high-wage jobs, consistent with employers fearing U.S.-educated applicants have better outside options and will be harder to hire and retain. The gap is also smaller at foreign-owned firms, consistent with Chinese-owned firms knowing less about American education. Controlling for high school quality, test scores, or U.S. work experience does not attenuate the gap, suggesting that it is not driven by employer perceptions of negative selection. A companion employer survey of 260 hiring managers finds consistent and additional supporting evidence for the experimental findings.

JEL classification: I23, I26, J24, J61, J63, M51
China as a host destination

China-Africa of particular interest: biggest destination for Anglophone Africans (61K in 2016)
China as a host destination

Belt and Road Initiative – BRI – already making impact
Market shares of top destinations

2018
5.0 million students

Source: Project Atlas, 2018; UNESCO, 2018

PROJECT ATLAS® is an initiative of the INSTITUTE OF INTERNATIONAL EDUCATION and has been supported by the Ford Foundation, the Bureau of Educational and Cultural Affairs (ECA) of the United States Department of State, IIE, and country partners.
Competition is rising, investment is flooding in

Market overall is up.
Examples of new companies in last 5 years.
PE backing.
Pathway sector, continued growth.
HE still big focus...
Types of student

- For oneself – Experience led, gap year style
- For life, work – Employment led
- To survive – Refugee. Global refugee population of 25 million. (18-20k in German HE system)

Credentials key for all
The global citizen

Employment/relevance as motivators
Growth in TNE, international K-12, EMI

Intake into international schools. Source: ISC research
Growth in TNE, international K-12, EMI

Figures from the Council of British International Schools (COBIS) indicate that 39% of pupils that left COBIS schools in 2012 went on to study at a UK higher education institution.

No. of international students enrolled on UK-delivered TNE programs in 2014/15 – excluding the Oxford Brooks ACCA phenomenon (280k)
Digital impact

Demand remains, evolves, but digital disrupts

Portability, soft skills are key
Digital impact: 22\textsuperscript{nd}-century ready
The way we want to learn

**GENERATION Z**
- Tech Innate: 5 screens
- Think in 4D
- Judiciously Share (GeoLoco Off)
- Active Volunteers
- Blended (gender & race)
- Togetherness
- Mature
- Communicate with Images
- Make Stuff
- Have Humility
- Future Focused
- Realists
- Want to Work for Success
- Collective Conscious

**MILLENNIALS**
- Tech Savvy: 2 screens
- Think in 3D
- Radical Transparency: Share All
- Slacktivists
- Multi-cultural
- Tolerance
- Immature
- Communicate with Text
- Share Stuff
- Have Low Confidence
- Now Focused
- Realists
- Optimists
- Want to be Discovered
- Team Orientation
AI and automation: impact

• Ability of education systems to teach 21C skills will determine appeal to globally mobile
  • Industries of future: cyber security, space exploration, renewable energy, 3D tech
• Up to 65% of primary school children to work in roles that do not currently exist?
  • Aging societies will also attract new tech investment but jobs too
AI as an opportunity

• Which education systems can retrain, reskill?
  • Just-in-time training, micro-credentials
• Systems that can reduce admin, marking for teachers
• Personalised content for learning styles
What do we expect to see?

- Future predictions…..
- Gen Z and climate change implications
- Rise in TNE, studying closer to home
- Unbundling, 2+2, 1+3, etc.
- AI and tech core will carry sway
Thank You
amy@thepienews.com
www.thepienews.com