## Modes of supply of educational services

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

• 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