

Central Asia's Future Role in International Higher Education

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Outline

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Aims

- (Kazakhstan, Kyrgyz Republic, Tajikistan) in the global pattern of tertiary education internationalisation
- To suggest possible forecasts
- To raise some issues for discussion

Dimensions of internationalisation

Tertiary education is rapidly internationalising

- Mobility a rising but still small share of all students: of 165m, 3.37m studied abroad 2009
- Growth at 6.2%, volatility, but forecast 5.8m by 2020
- Universalisation of secondary education dramatically raising latent demand and social pressures
- Common aspiration of rising middle classes
- Countries actively seeking education export industry e.g. capacity building, import replacement, education hubs
- Rise of cross-border recognition, accreditation, QA
- WTO GATS round negotiations on trade in education services still alive (just)
- Dramatic increase in private provision, including for-profit
- Not all is growth and development around the world – economic crisis, protectionism, complacency on languages, growth without development

Mobility can be of programs, students, investment or teachers

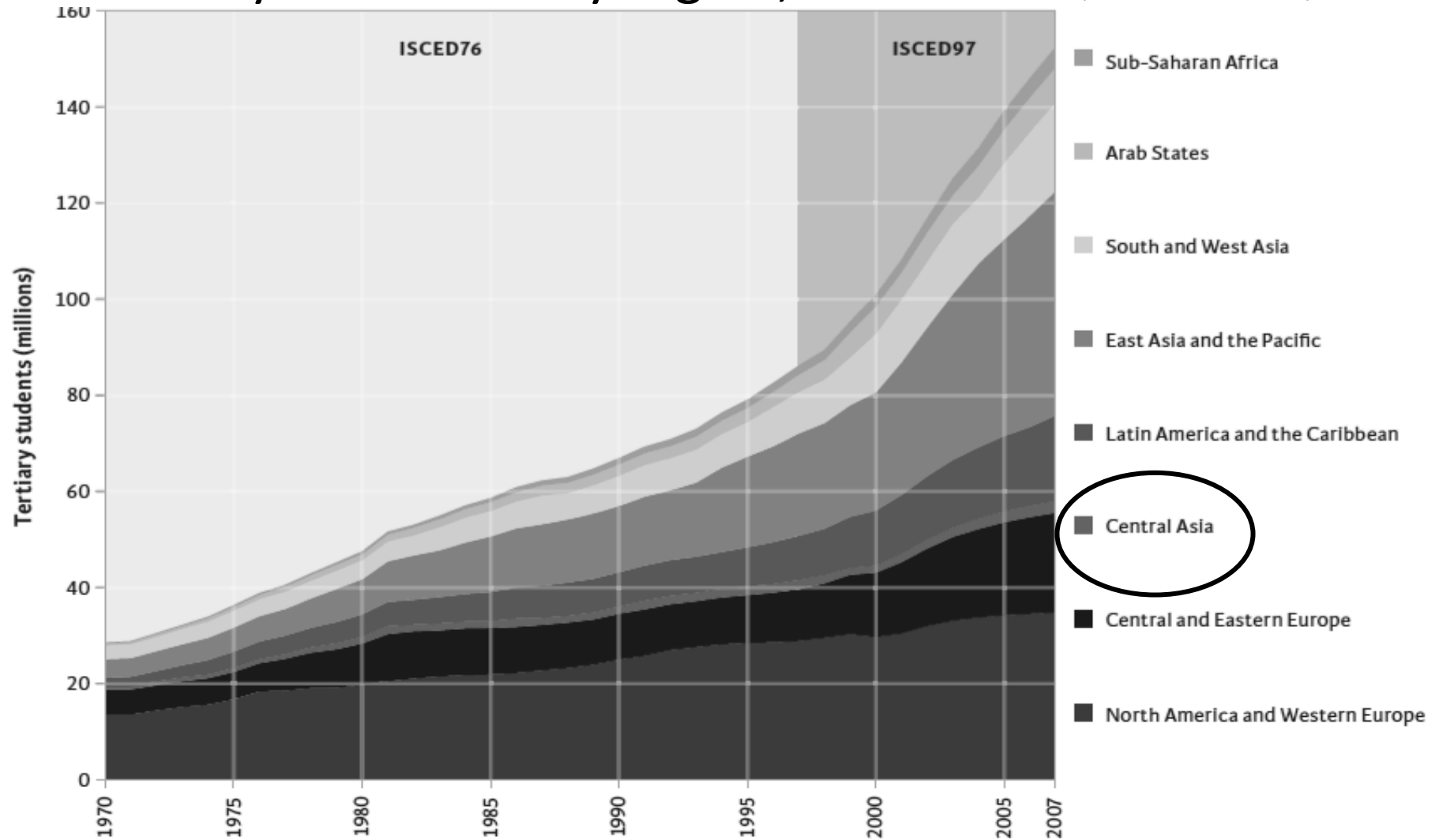
Cross-border trade in education services (Knight 2005)

Mode of Supply According to GATS	Explanation	Examples in Higher Education	Size /Potential of market
1. Cross Border Supply	-the provision of a service where the service crosses the border (does not require the physical movement of the consumer)	-distance education - e-learning -virtual universities	-currently a relatively small market -seen to have great potential through the use of new ICTs and especially the Internet
2. Consumption Abroad	-provision of the service involving the movement of the consumer to the country of the supplier	-students who go to another country to study	-currently represents the largest share of the global market for education services
3. Commercial Presence	-the service provider establishes or has presence of commercial facilities in another country in order to render service	-local branch or satellite campuses -twinning partnerships - franchising arrangements with local institutions	-growing interest and strong potential for future growth -most controversial as it appears to set international rules on foreign investment
4. Presence of Natural Persons	- persons travelling to another country on a temporary basis to provide service	-professors, teachers, researchers working abroad	-potentially a strong market given the emphasis on mobility of professionals

Central Asia's position in the global picture

Tertiary enrolments are growing fast

Tertiary enrolment by region, 1970-2007 (UNESCO 2009)

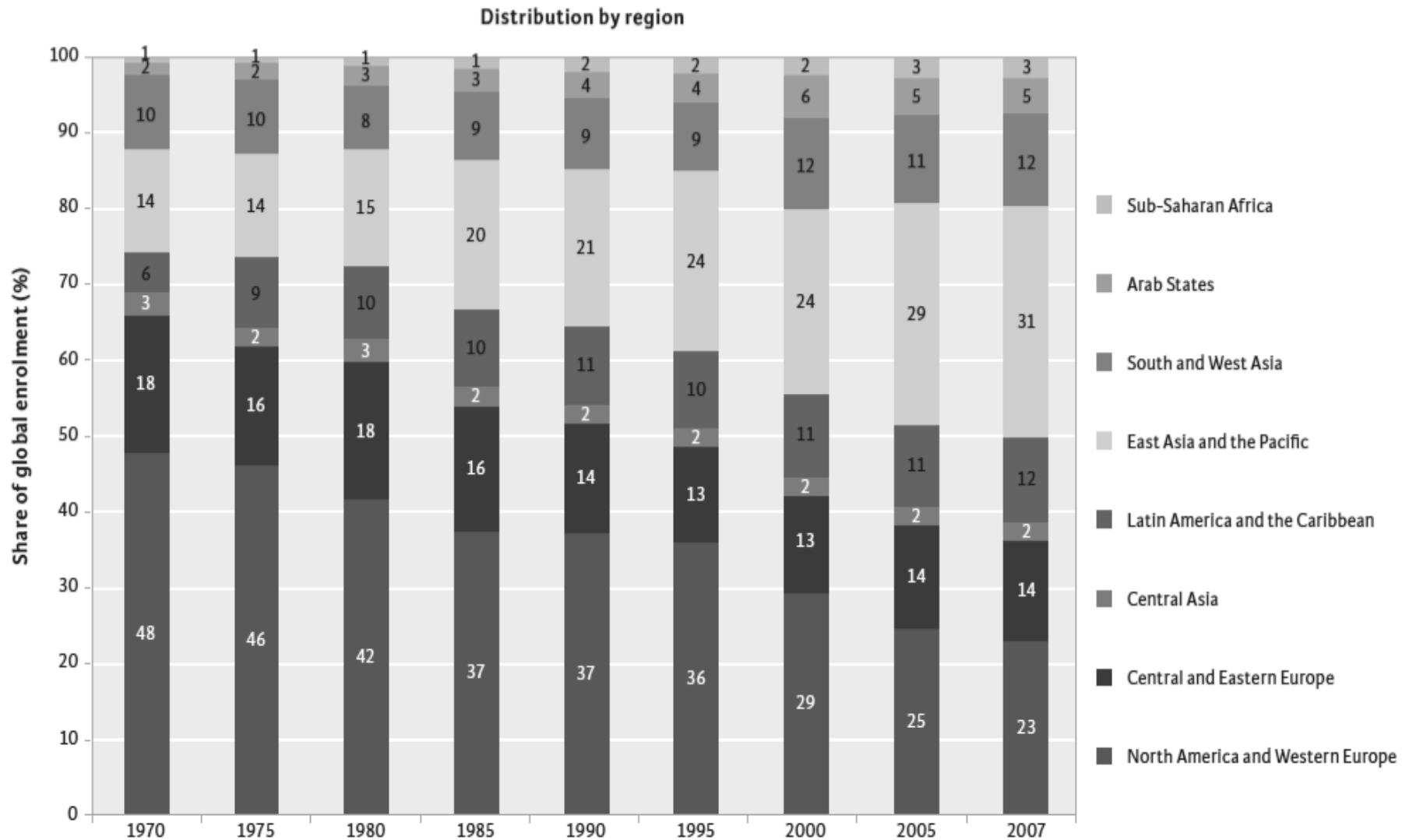


Central Asia, comparative size of tertiary education, 2009 (UNESCO 2011)

	Total tertiary enrolments 2008 ('000)	Tertiary GER 2009	Tertiary GER female	Gross graduation ratio ISCED 5A, 1 st degree	Tertiary teaching staff '000	Tertiary teaching staff, % female
Kazakhstan*	610	39	49	61	39*	63*
Kyrgyz Republic	294	51	60	29	17	59
Tajikistan	157	20	11	n.a.	9	33
Central Asia	2,108	25	27	n.a.	154	53
World	164,582	27	27	n.a.	10,393	41
						*=2010

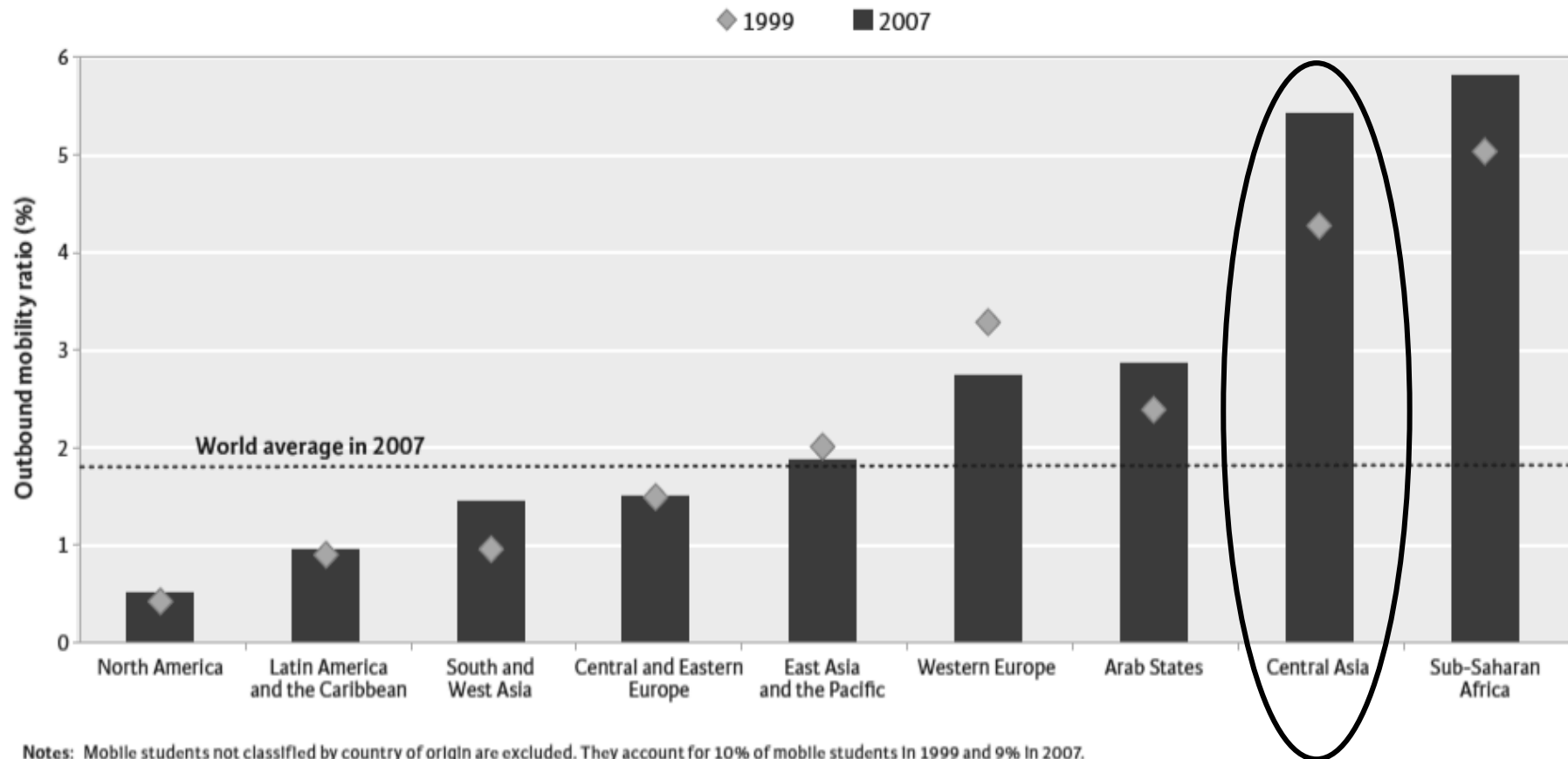
Central Asia has around 2% of world market

Tertiary enrolment by region as a percent of global enrolment,
1970-2007 (UNESCO 2009)



Central Asia is a major net sender

Number of mobile tertiary students from a given region as a percent of tertiary enrolment in that region, 1999 and 2007
(UNESCO 2010)



Notes: Mobile students not classified by country of origin are excluded. They account for 10% of mobile students in 1999 and 9% in 2007. Data were partially imputed for previous years.

Source: UNESCO Institute for Statistics, Statistical Table 10 and UIS database.

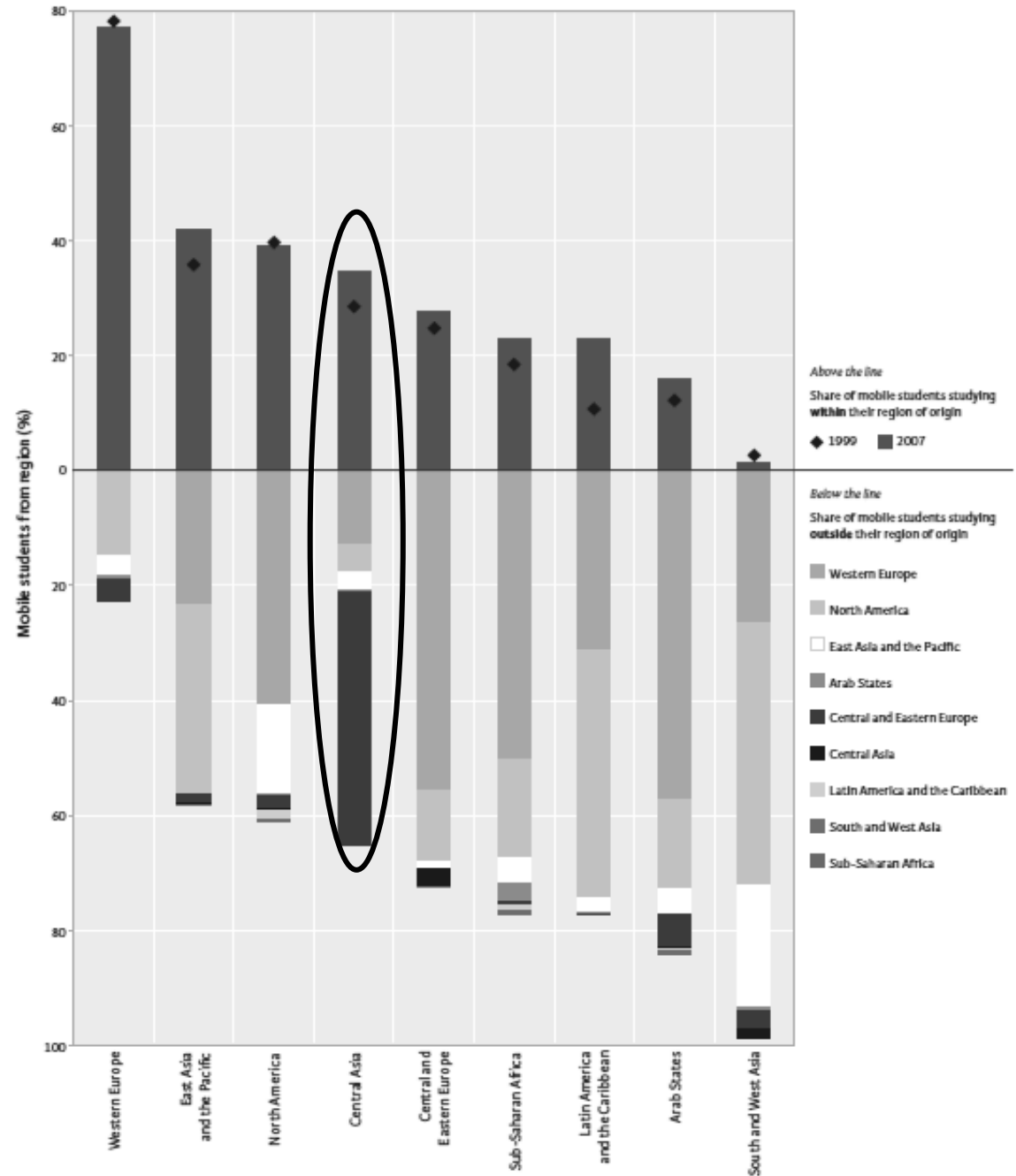
Kazakhstan and Tajikistan are net senders

Tertiary Education (ISCED 5&6) international flows of mobile students, 2009 (UNESCO 2011)

Region or country	Students from a given country studying abroad (outbound mobile students)			Top five destinations (host countries) for outbound mobile students (the number of students from a given country studying in the host countries is shown in brackets)	Number of students from abroad studying in a given country (inbound mobile students)	Net flow of mobile students (inbound - outbound)	
	MF	Out-bound mobility ratio (%)	Gross outbound enrolment ratio (%)			MF	Net flow ratio (%)
Kazakhstan	46,142	7.3	3.0	Russian Fed. (35,531) [yr2008], Kyrgyzstan (3,370), U.S.A. (1,686), U.K. (1,550), Germany (725)	10,458	-35,684	-5.6
Kyrgyzstan	4,284	1.5	0.7	Russian Fed. (1,636)[yr2008], Turkey (596)[yr2008], Kazakhstan (526), Germany (499), U.S.A. (270)	20,236	15,952	5.4
Tajikistan	5,561	3.5	0.7	Russian Fed. (2,836)[yr2008], Kyrgyzstan (1,495), U.S.A. (336), Kazakhstan (253), Turkey (162)[yr2008]	3,214	-2,347	-1.5

Most Central Asian international students study in Central Asia

Regional distribution of mobile students by their region of origin, 1999 and 2007 (UNESCO 2009)



Differential readiness for internationalised higher education

Central Asia has small share of cross-border hosting

Central Asia, tertiary education (ISCED 5 and 6) inbound international flows of mobile students, 2009 (UNESCO 2011)

Region or country	Students from abroad studying in a given country (inbound mobile students)		
	Number of students	% female	Inbound mobility rate (%)
Kazakhstan	10,458	n.a.	1.6
Kyrgyzstan	20,236	56	6.9
Tajikistan	3,214	19	2.0
Central Asia	47,168	44	2.2
World	3,369,242	48	2.0

Central Asian hosts mainly CIS students

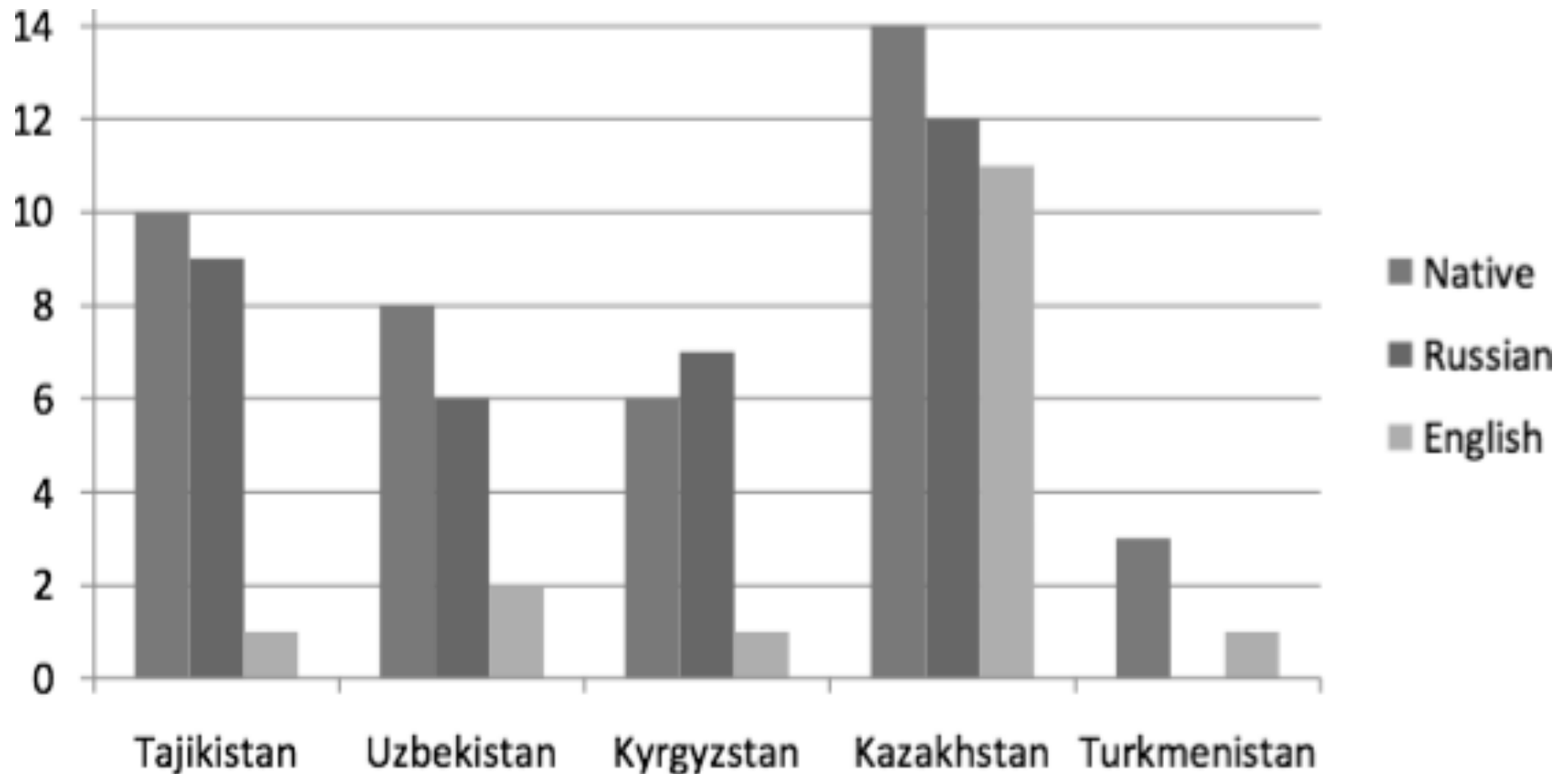
Central Asia, tertiary education (ISCED 5 and 6) internationally mobile students by host country and country of origin, 2009

(UNESCO 2011)

	Arab States	Central and Eastern Europe	Central Asia	East Asia and the Pacific	Latin America and the Caribbean	North America and Western Europe	South and West Asia	Sub-Saharan Africa	Unspecified
Kazakhstan	5	2,634	5,097	2,164	<5	45	505	6	-
Kyrgyzstan	724	1,894	16,378	507	12	-	552	-	181
Tajikistan	<5	150	2,506	10	<5	<5	542	<5	<5
Central Asia	11,107	25,944		3,440	<5	136	4,318	31	1,141
World	232,463	374,801	120,983	945,637	195,951	522,531	321,549	234,886	420,443

Kazakhstan leads in using English as a medium

Central Asia, teaching in different languages (UNDP 2010)



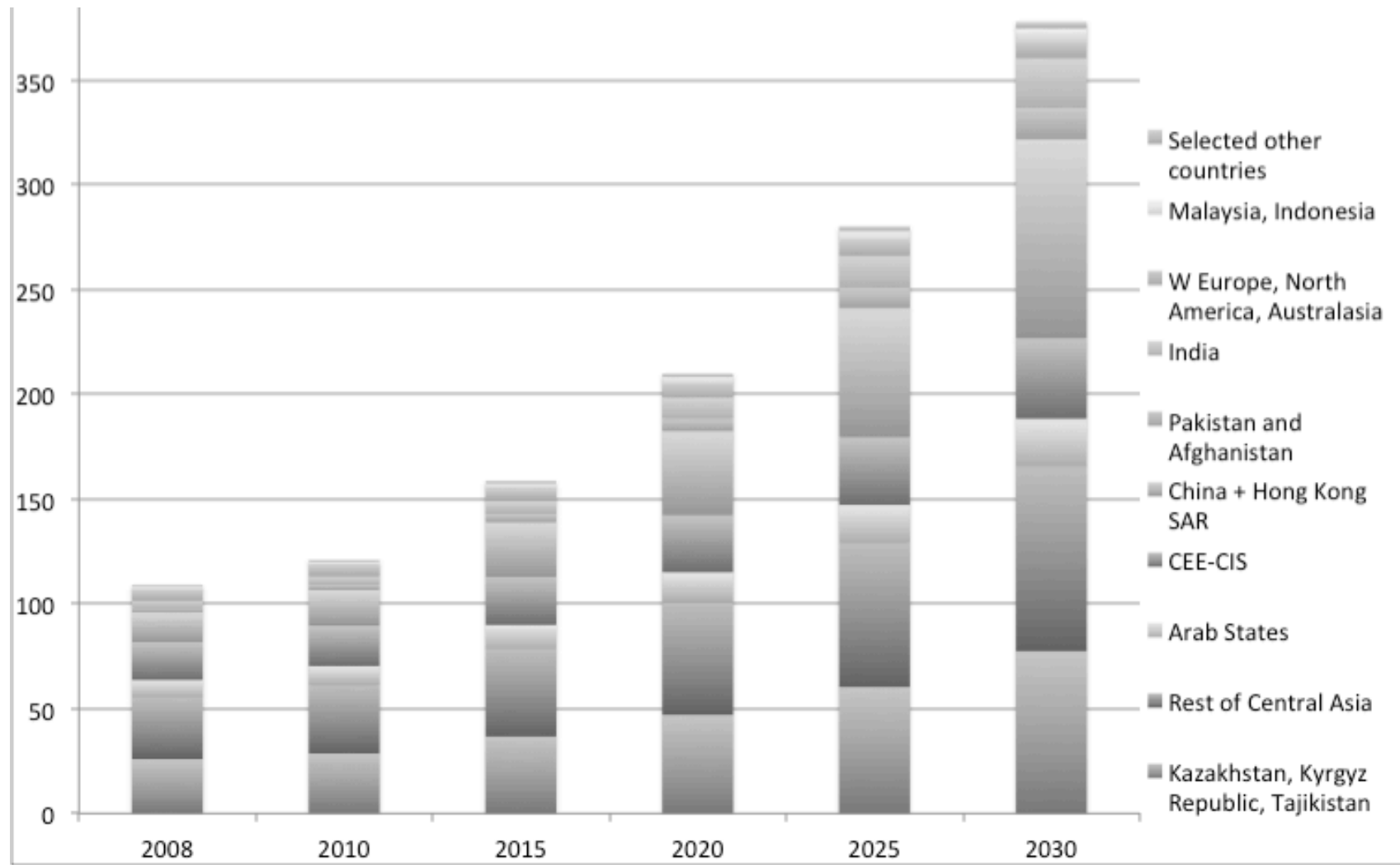
Central Asia's opportunities

Internationalisation strengths

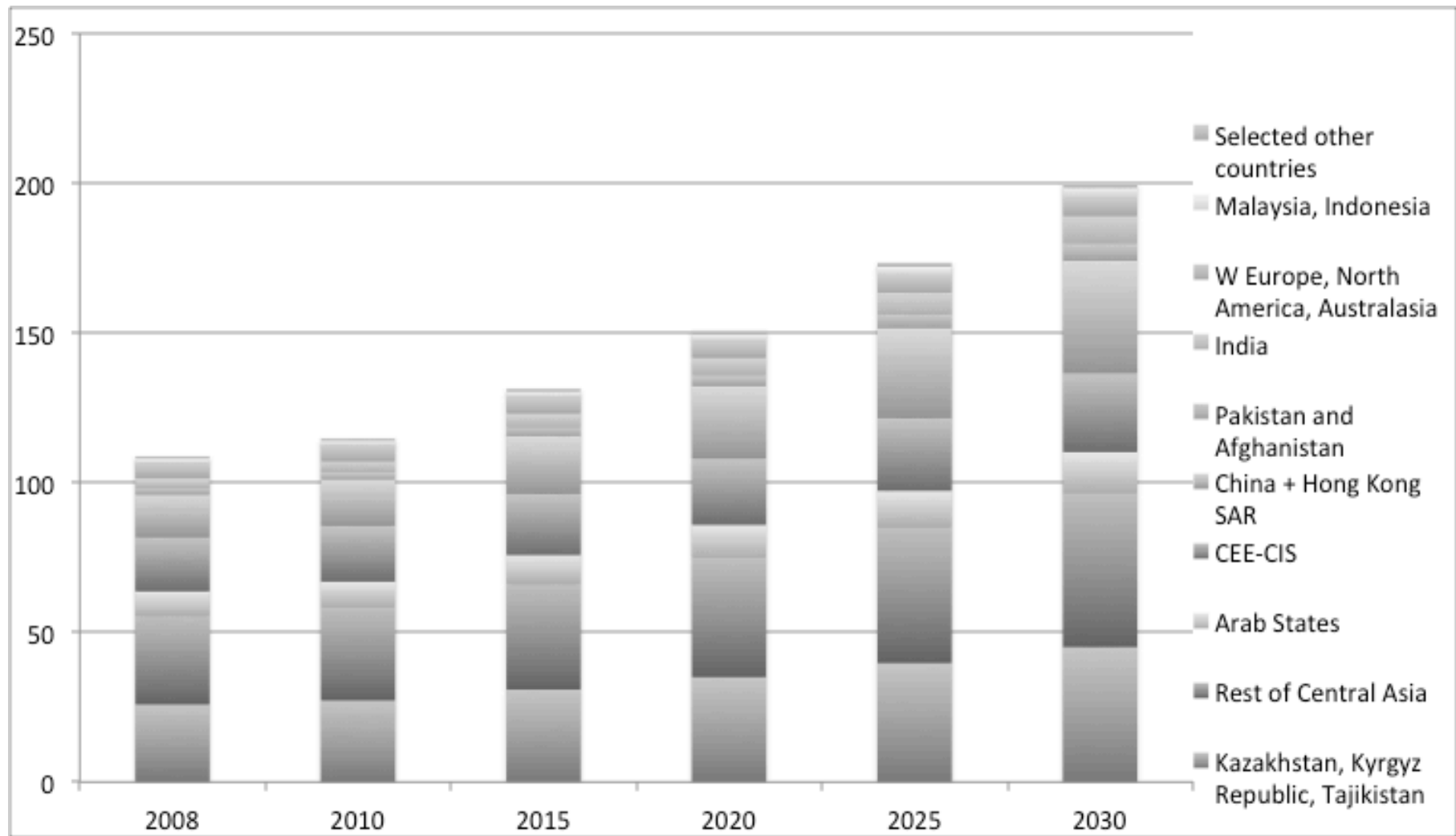
- Centuries of exchange and mobility
- International integration through USSR years
- Eurasian transport and communications network integration
- Fundamental education transformations under way
- Nominal domestic surplus capacity an opportunity
- Internationally distributed professional labor force
- International benchmarking and credit recognition strategies in implementation
- Networks of agreements for exchange and cooperation
- Distinctive study and research destinations
- Development of some world-class HEIs
- A world awakening to Central Asia

Forecast of Central Asia student mobility

Size of potential Central Asia tertiary international student market, high growth, '000 students



Size of potential Central Asia tertiary international student market, low growth, '000 students



Suggestions for discussion

Some possible discussion points

- Much to do: what priority should internationalisation of HE have?
- What are the pathways from 'dawn' and 'sunrise' markets to maturity?
- Should we build national frameworks for organising growth in international student and scholar mobility
- Is there a role for planned education hubs?
- Development issues and the roles of partners and donors: is the price of support system distortion?
- Elite vs mass: a few top institutions or broad buildup?
- Globalisation through international standards, networks, languages etc vs cultural autonomy and national education sector independence
- Languages policies as a case in point
- Tap into diasporas, the circulation of expats, use of remittances
- How to tell when a brain drain might be a brain gain?
- High price of admission to international research league
- Inbound investments in new HEIs and branch campuses – worth promoting?
- How long before macro-regional infrastructure will help eg Trans-Asia Highways? (eg Kazakhstan-Xinjiang, Kyrgyz Republic-China, Tajikistan-Afghanistan/Pakistan?)
- National concerns over cross-border domination and instability – do the 3 countries really want large numbers of international students?

Рахмет
Спасибо
Thank you