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GLOBAL

The higher education landscape is changing fast

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The landscape of higher education globally continues to shift remarkably. According to the UNESCO Institute for Statistics, in 1970 there were 32.6 million students enrolled in higher education institutions compared to 99.9 million in 2000. This represents an increase of 206% over this period.

Although there are signs that enrolments in higher education around the globe are slowing down (in part influenced by a declining youth population and lower fertility rates), it is estimated that the number of enrolments will rise from 214.1 million in 2015 to 594.1 million by 2040.

This growth would represent an increase of 281% over the 30 years from 2000 to 2030; the growth over the period from 2000 to 2030 is therefore likely to be higher than that experienced between 1970 and 2000.

Geopolitical shifts

There is a geopolitical shift gradually taking place in higher education. Globally there were 1,255 students per 100,000 inhabitants in 1990, increasing to 1,625 by 2000 and then it continued to rise to 2,900 in 2015.

In 2016, there was a slight decrease to 2,892 and it was the second year in about 20 that it declined. The other year in which there was a decline was in 2013, to 2,764 from 2,767 in 2012.

On a regional basis, the Central and Eastern Europe region had the highest participation for many years and has plateaued, while the North America and Western Europe region regained the standing in 2016 that it had lost in recent years.

Over the 10-year period between 2007 and 2016, the region that experienced the greatest growth was South and West Asia, which increased by 83% from 1,247 to 2,288 per 100,000 inhabitants, followed by East Asia and the Pacific, increasing by 41%, from 2,162 in 2007 to 3,053 in 2016.

In 2016, the regions that had the greatest proportion of population in higher education (more than 4,000 students per 100,000 inhabitants) were Central and Eastern Europe, North America and Western Europe and Latin America and the Caribbean, while Sub-Saharan Africa had the lowest (747 students per 100,000 inhabitants).

This is set to change. Aside from demographic shifts, other key drivers that are influencing the global society and economy include:

- Geopolitical shifts are altering the balance of power, the dynamics of trade (including educational services and the mobility of people) and social norms. The continued rise of China (and flow-on effects on trade and political influence across world regions) and the rise of nationalism and populism in many countries are critical developments that come to mind in considering long-term enrolment forecasts.
- The process of urbanisation remains unabated. In 1950, 29.6% of the world's population lived in urban centres. By 2000, 46.65% of the world's population lived in urban centres and the most urbanised world regions had more than 70% of their population living in urban centres and by 2050, 66.4% of the world's population will live in urban centres.
- To the extent that urbanisation has shaped the transformation of the world's economy over the past 70 years, the technological revolution is equally having such an impact in changing the world's economy. Access to technology and the transformation it has enabled have contributed to making education more accessible and affordable to those who seek it and less costly for providers. Automation, artificial intelligence and every technological development are defining the global labour market landscape and their overall societal impact is a work in progress.

Projected enrolments by region

Taking all of this into consideration, it is predicted that, globally, the number of enrolments in higher education is expected to increase from 214.1 million in 2015 to 250.7 million by 2020 and it is expected it will continue to rise to 377.4 million by 2030 and 594.1 million by 2040.

On a regional basis, East Asia and the Pacific is expected to remain the region with the highest volume and share of enrolments, increasing to 148.8 million (39.4% share) by 2030 and 257.6 million (43.4% share) by 2040. The number of students per 100,000 inhabitants is expected to rise from 3,009 in 2015 to 6,071 by 2030 and 10,438 by 2040, being the region with the highest proportion globally.

Countries in the region are at varying stages of development. Although there is significant improvement in participation, quality of education and investment, there are many societal challenges, such as gender and minority inclusion.

South and West Asia is expected to be the region with the second-highest volume of enrolments, increasing to 91.4 million by 2030 and then increasing to 160.4 million by 2040 for a global share of 27.0%.

The number of students per 100,000 inhabitants is expected to rise from 2,315 in 2015 to 4,283 by 2030 and 7,023 by 2040, going from being the region with the second-lowest proportion in 2015 to being third highest globally by 2040.

Again, countries in the region are at varying degrees of development and with considerable disparities between them. Compared to East Asia and the Pacific, funding, quality of education and delivery remain paramount challenges and it may take some decades to reduce the gap.

The Latin America and the Caribbean region is expected to experience an increase in enrolments from 25.3 million in 2015 to 36.7 million by 2030 and then rise to 65.6 million by 2040. The rate of growth in enrolments from this region is likely to slow down from about 2025 due to population shifts and lower fertility rates.

The number of students per 100,000 inhabitants is expected to rise from 4,005 in 2015 to 6,186 by 2030 and 8,674 by 2040, going from being the third-highest region to being the second-highest proportion globally by 2040.

Key challenges are: Improving quality of education and competitiveness of institutions together with higher secondary education completion rates and increased tertiary education retention rates. Private provision is likely to remain strong over the next 20 years.

The North America and Western Europe region is expected to experience a further decline in its share of global enrolments from 17.5% in 2015 to 10.7% by 2030 and 7.4% by 2040. Enrolments are expected to reach 40.6 million in 2030 and 43.7 million by 2040. In part growth in enrolments is driven by international migration.

The number of students per 100,000 inhabitants is expected to rise from 4,800 in 2015 to 4,864 by 2030 and 5,071 by 2040, going from being the region with the second-highest proportion in 2015 to being fifth-highest globally by 2040. This shift is explained by the decline in population.

Key challenges are: Improving pathway opportunities, lifting participation rates from disadvantaged and minority groups as well as lifting tertiary education completion rates and tuition affordability. Further fragmentation of the sector is envisaged given the economic and social instability that will hinder investment in tertiary education.

The Arab states region is expected to have a greater number of enrolments (22.3 million) by 2040 compared to Central and Eastern Europe (20.5 million). Enrolments in Arab states are expected to double in number from 10.7 million in 2015 to 22.3 million by 2040, while the number of enrolments in Central and Eastern Europe are marginally increasing between 2015 and 2040, driven by a declining overall population.

Sub-Saharan Africa is expected to continue to experience strong growth in enrolments as more and more countries in the region make advances in strengthening their national systems of education and attain higher completion rates in secondary

education. Enrolments are expected to increase from 7.4 million in 2015 to 8.8 million by 2030 and 21.7 million by 2040.

The number of students per 100,000 inhabitants is expected to rise from 766 in 2015 to 964 by 2030 and 1,227 by 2040, remaining at the bottom among all world regions from 2015 to 2040.

There are many significant challenges but key are: Inadequate funding to support growth, access to education, quality of education and institutional capacity. To the extent that governments and international agencies support economic and societal development, the region will be positioned to attain higher levels of participation and attainment.

Central Asia is expected to see a marginal increase in the overall number of students enrolled in higher education from 2.1 million in 2015 to 2.2 million by 2040 due to population growth projections.

Looking further forward

By 2035, countries from Sub-Saharan Africa are likely to become the sunrise markets for higher education. Some 18 countries from this region will be in the top 50 in terms of volume for the population aged 18 to 23. In addition, 32 of Sub-Saharan Africa countries will be in the world's top 50 in terms of population growth for the 18 to 23 cohort.

Countries from East Asia and the Pacific will continue to dominate in volume and are likely to be mature markets. Countries from South and West Asia are likely to be sunshine markets by 2035-40. Countries from Central and Eastern Europe and Central Asia are likely to remain flat markets. The growth that is likely to be seen in countries from North America and Western Europe is likely to be driven by continued movement of persons.

More than ever before, the composition of the world's population will shape the basis for the regional make-up of those who participate in higher education (and determine the movement of people across borders). Past 2040, the world's population mix will likely feel different, which will affect the composition of the population that participates in education.

Forward estimates on population growth (both 18-23 cohort and overall population) suggest that by 2035-40 the expected growth in student enrolments in higher education will flatten in some countries in East Asia and the Pacific, Central and Eastern Europe, and Latin America and the Caribbean.

Middle-income countries are likely to be the new generators for enrolments in higher education by 2040 and it may be the beginning of a new era in the geopolitics of higher education.

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