



SERVICES FOR
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A look ahead to 2030
*Building international education strategies for
the future*

Matt Durnin, British Council

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GeoXoLabs



- I. Perils of the crystal ball
- II. Population: the very young and the very old
- III. Work: rise of the machines
- IV. Mobility: a regional kind of globalism
- V. Conclusions: Three big questions for 2030

- I. Perils of the crystal ball**
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I. Perils of the crystal ball



I. Perils of the crystal ball

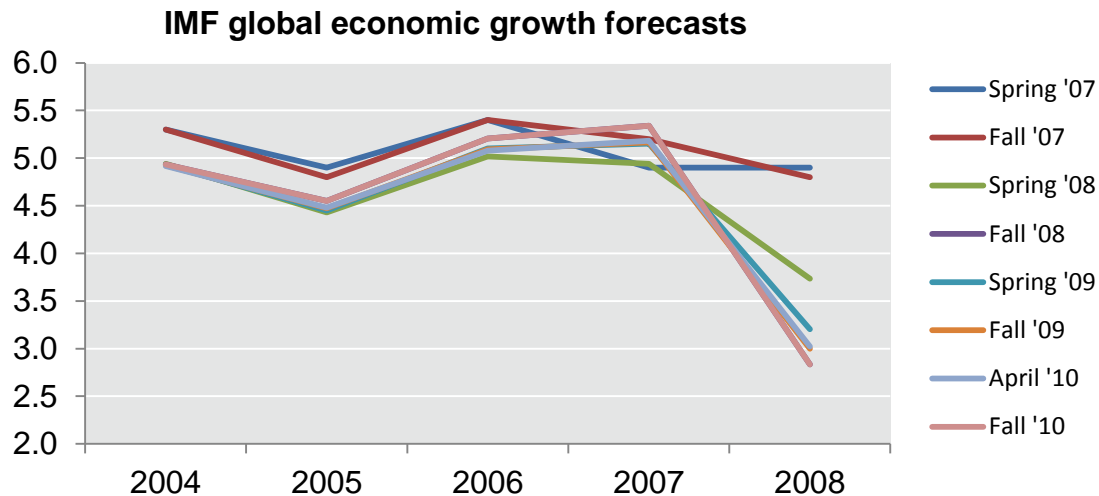


Source: Library of Congress (public domain)

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“He who lives by the crystal ball soon learns to eat round glass.”

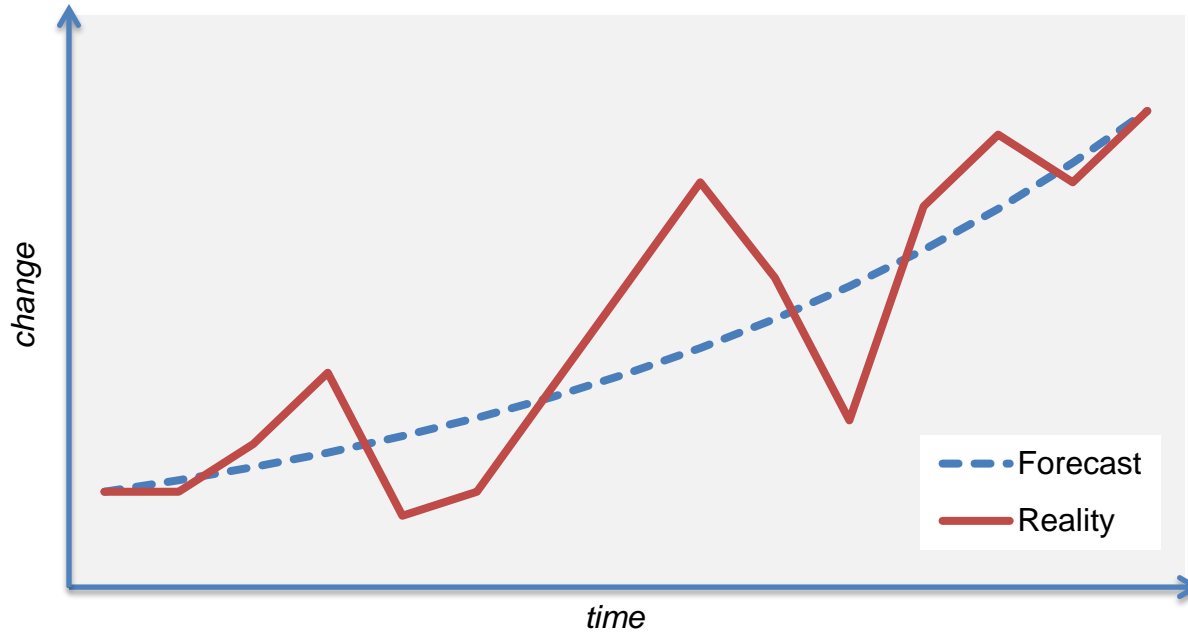
Edgar R. Fiedler in The Three Rs of Economic Forecasting-Irrational, Irrelevant and Irreverent



Source: IMF World Economic Outlook, various dates

I. Perils of the crystal ball

Can we predict volatility along the way?





Population

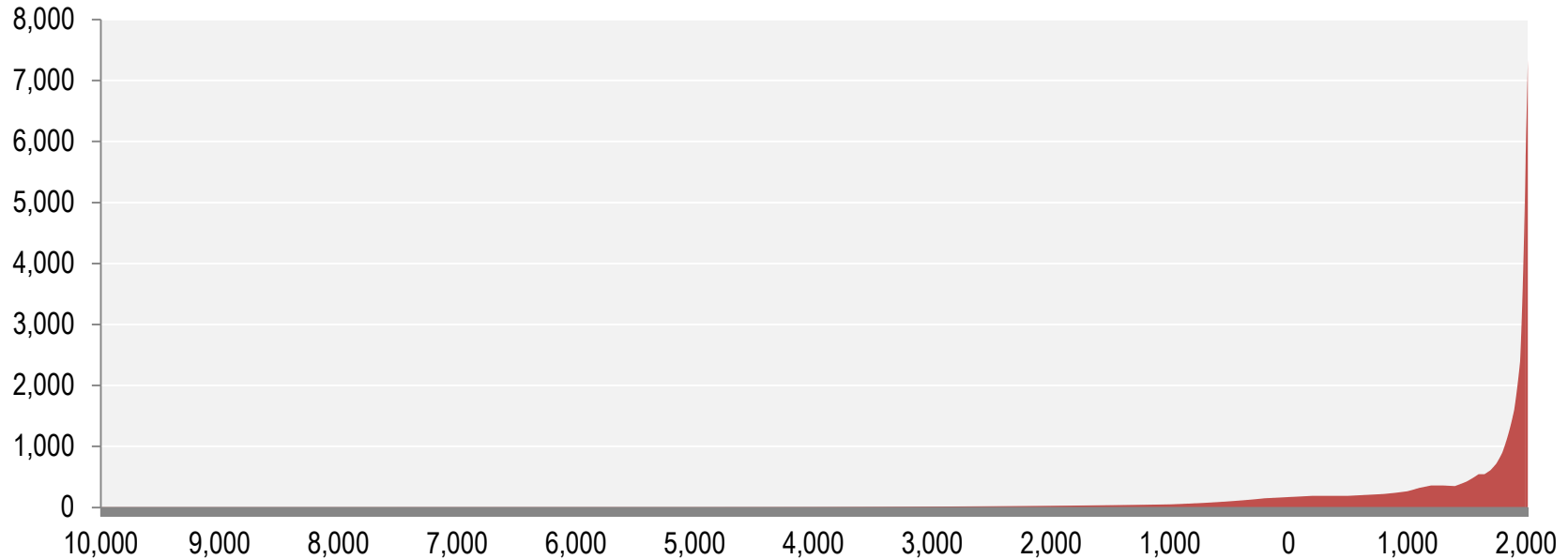
Work

Mobility

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II. Population: the very old and the very young

A 200-year exclamation point to 50,000 years of human history



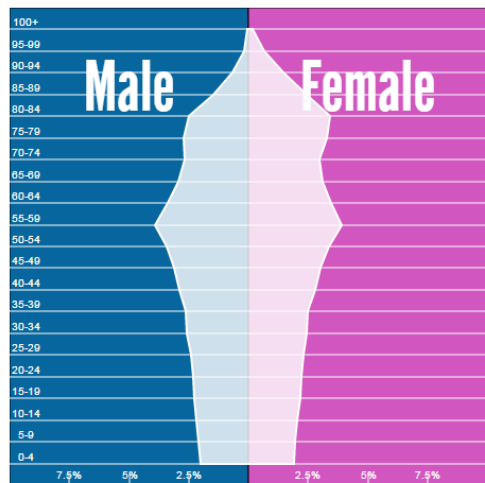
II. Population: the very old and the very young

[Gapminder video](#)

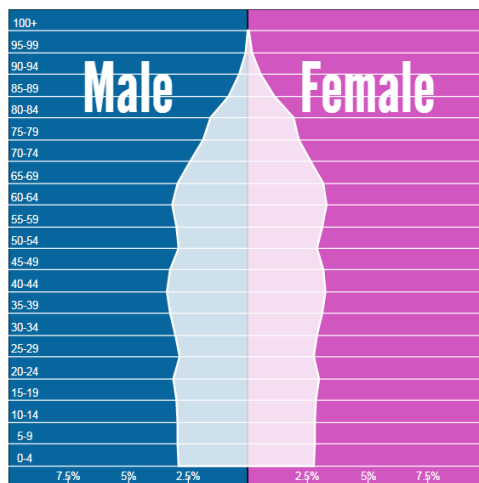
II. Population: the very old and the very young

There will be two diverging population stories in the next 15 years

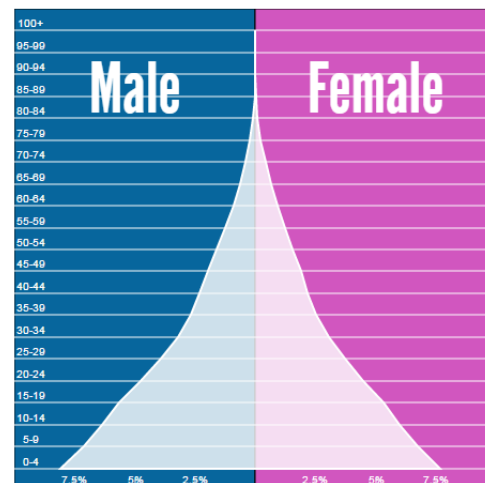
**Japan
2030**
Population: **120.624.000**



**United Kingdom
2030**
Population: **68.630.000**

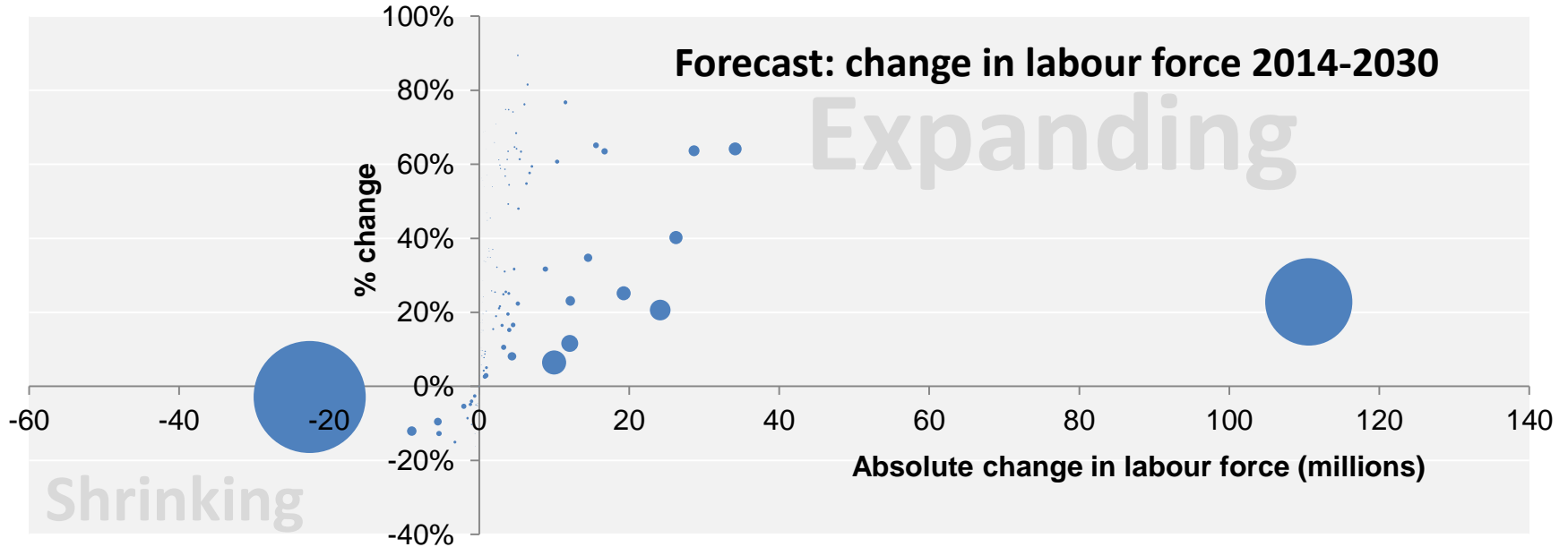


**Nigeria
2030**
Population: **273.120.000**



II. Population: the very old and the very young

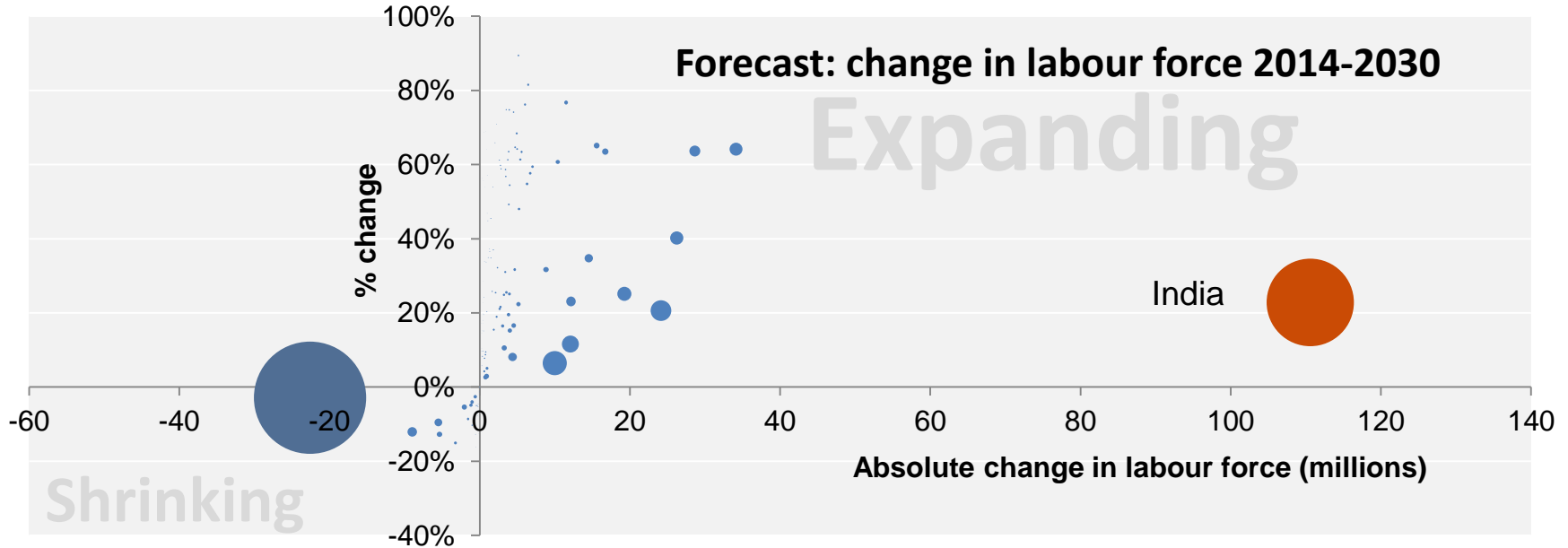
And vastly different trends in labour forces



Source: International Labour Organisation forecast to 2030 (estimates and projections)

II. Population: the very old and the very young

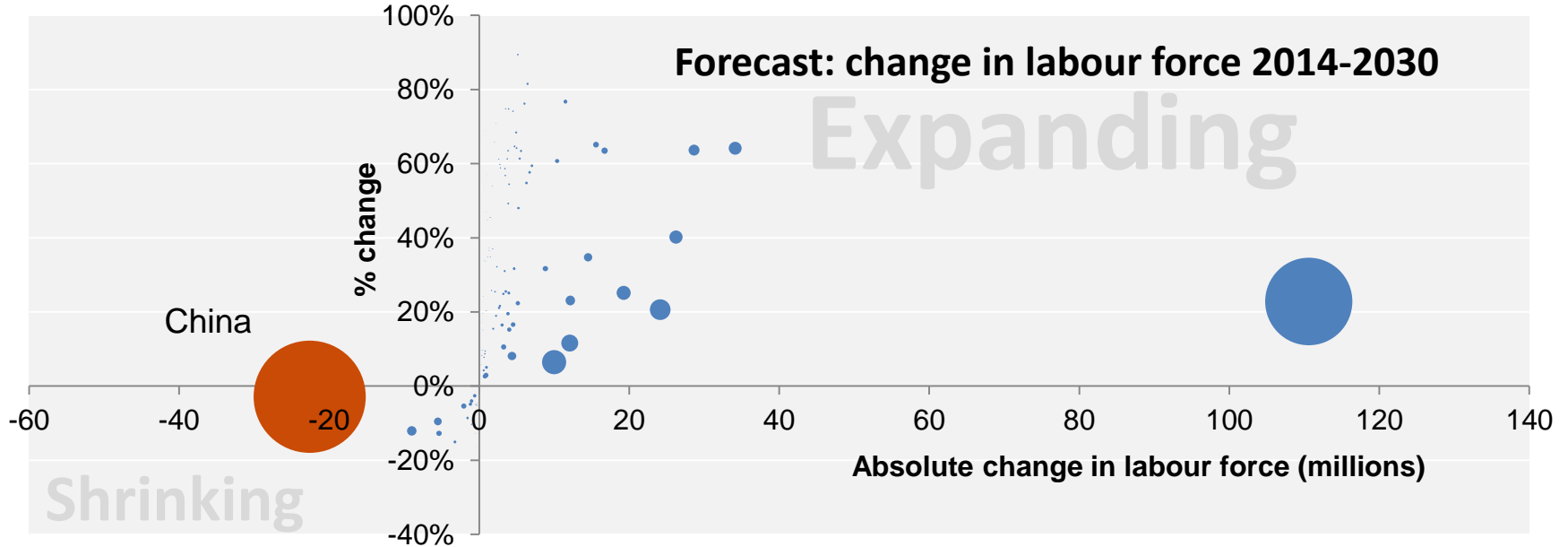
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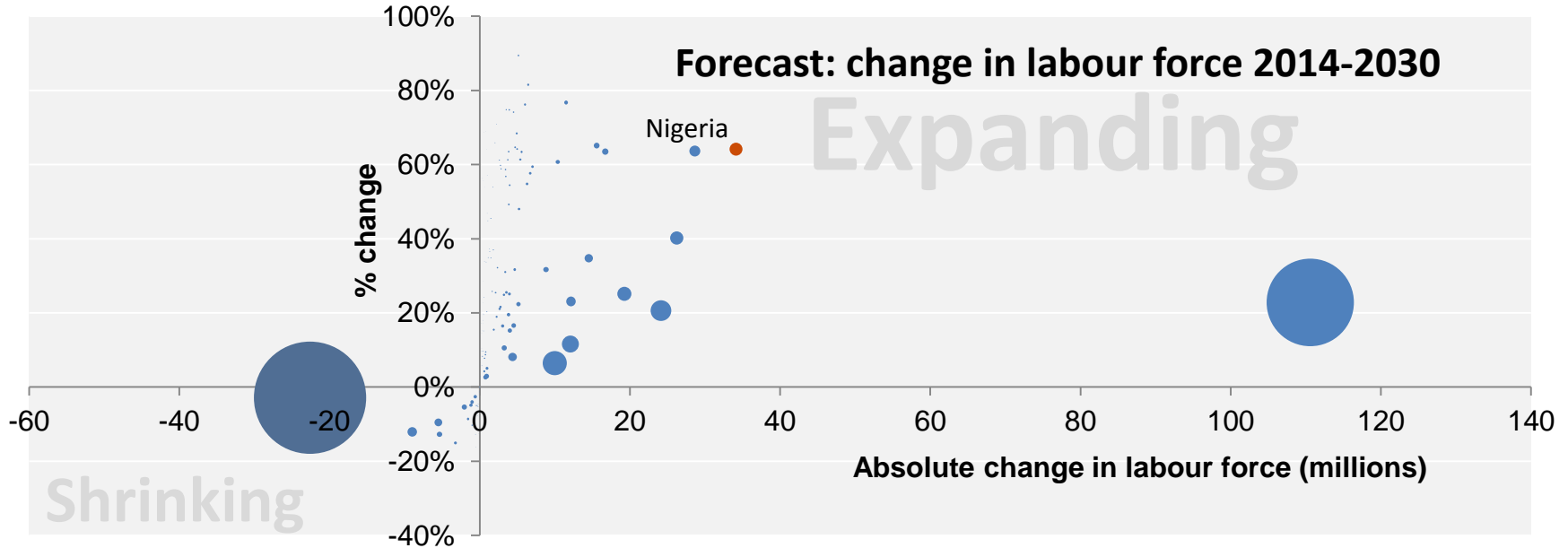
And vastly different trends in labour forces



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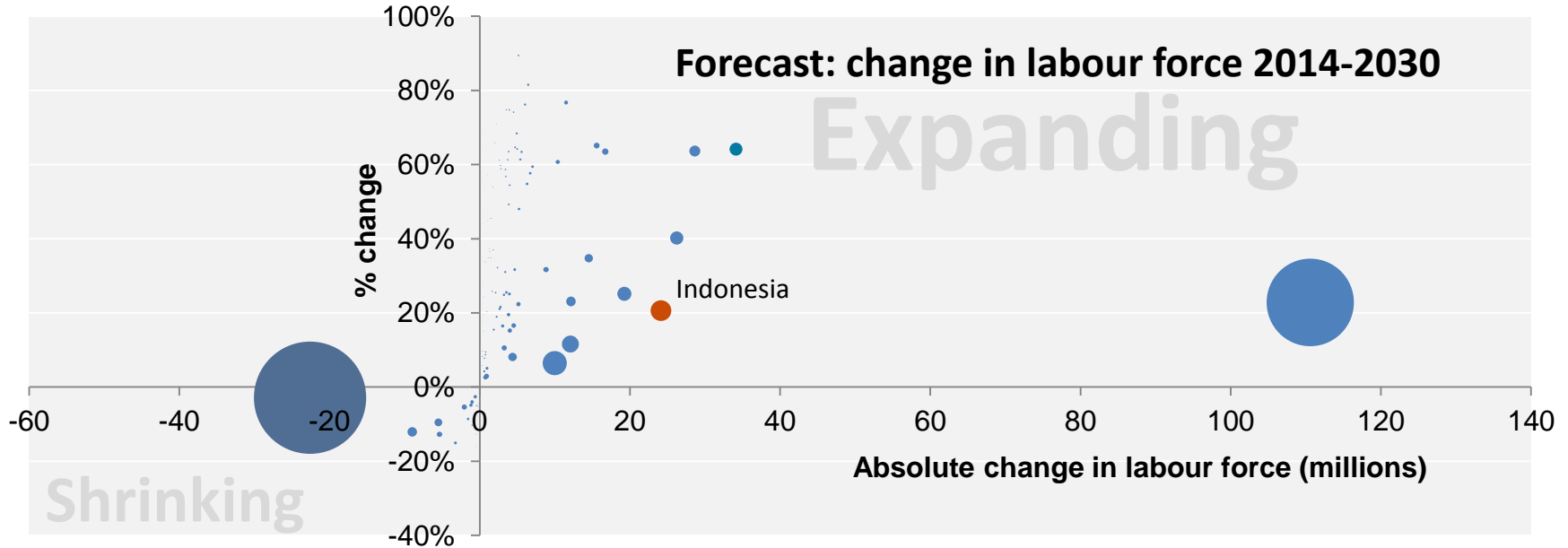
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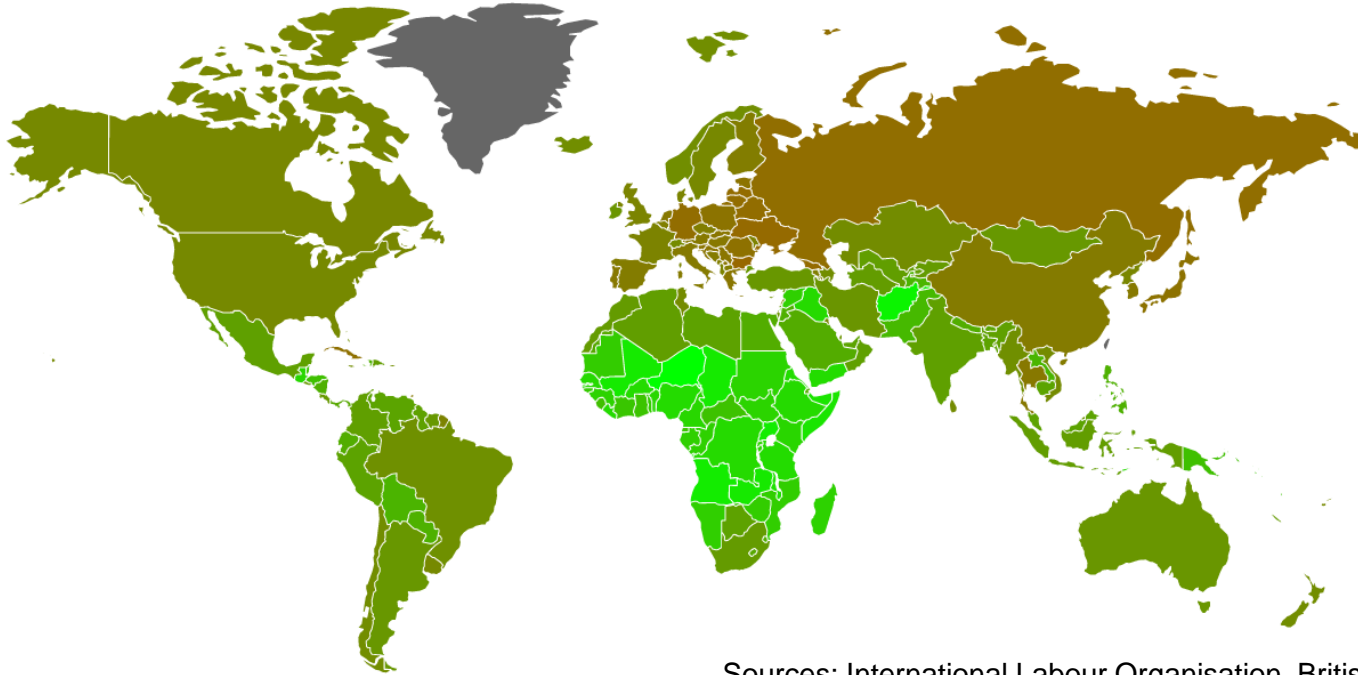
II. Population: the very old and the very young

And vastly different trends in labour forces



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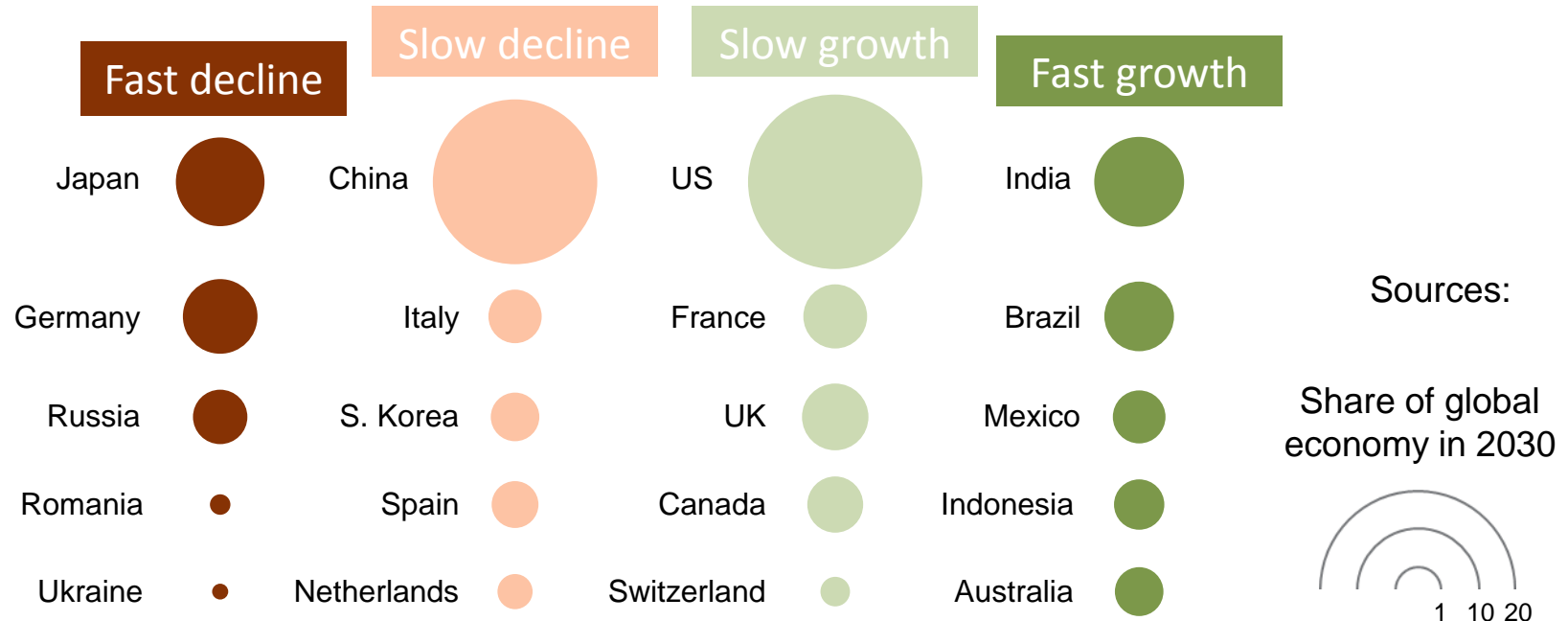
II. Population: the very old and the very young



Sources: International Labour Organisation, British Council

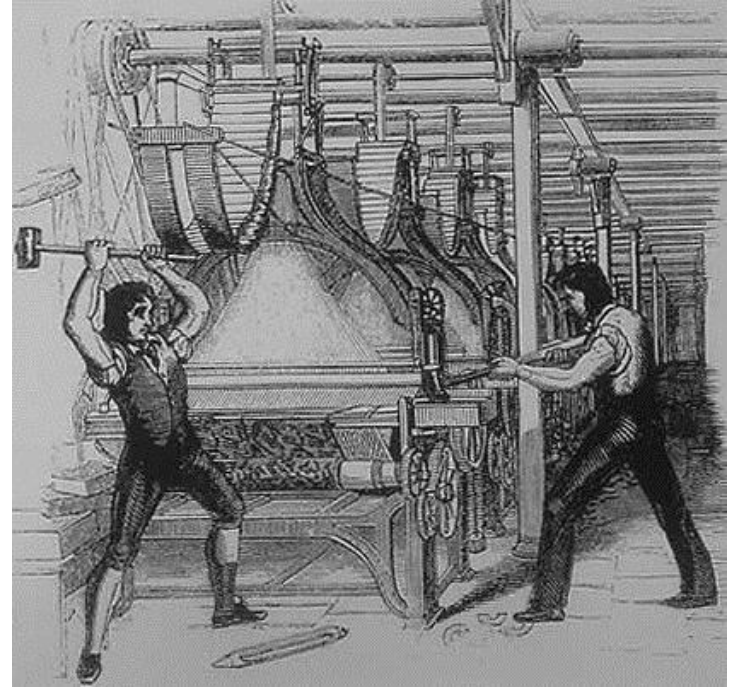
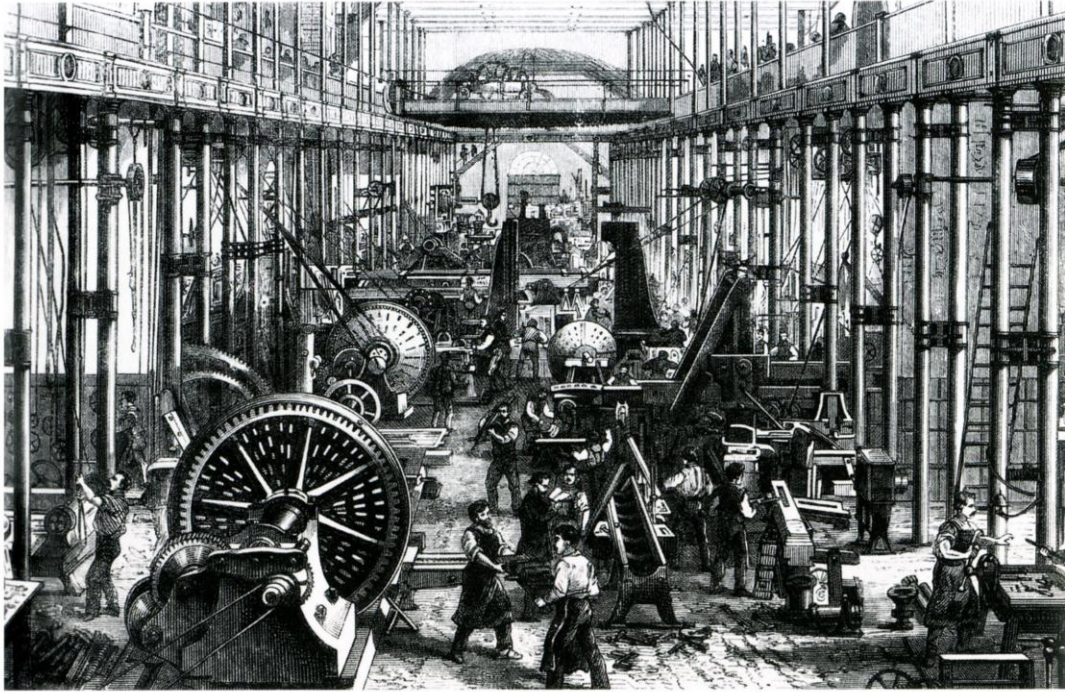
II. Population: the very old and the very young

Fast-growth labour forces include a geographically diverse group of rising economic heavyweights



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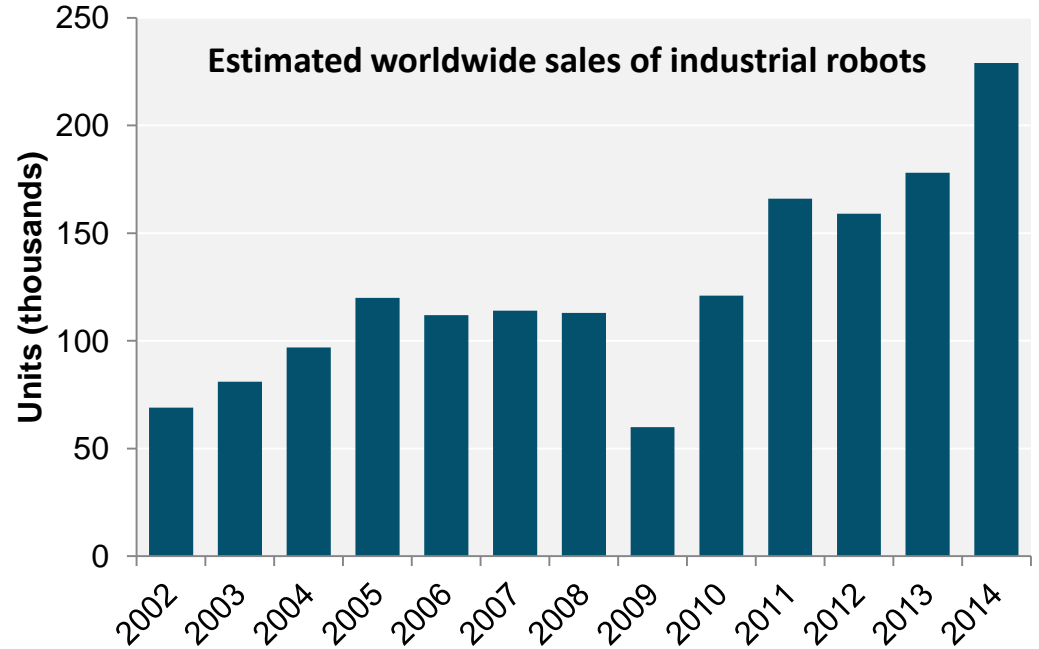
III. Work: rise of the machines



III. Work: rise of the machines

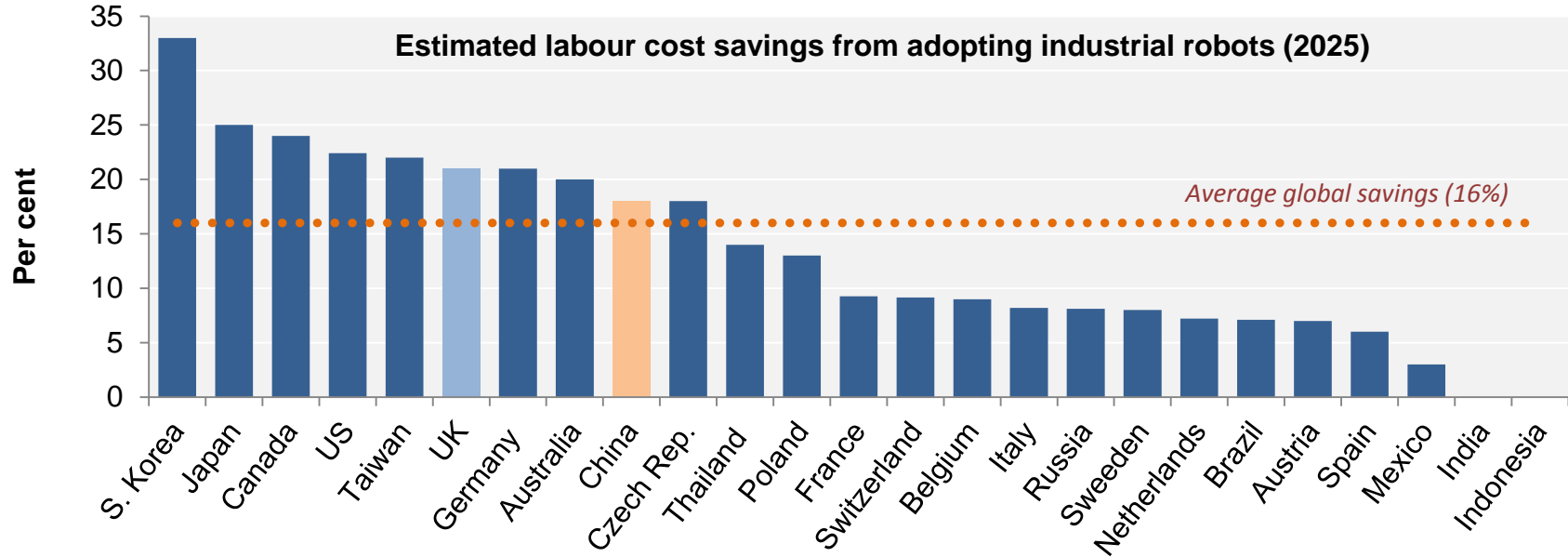


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Source: International Federation of Robotics

III. Work: rise of the machines



Source: Boston Consulting Group

III. Work: rise of the machines

Google began snatching up robotics companies in 2013

Date	Company	Specialisation	Country
December 2, 2013	SCHAFT, Inc.	Robotics, humanoid robots	JPN
December 3, 2013	Industrial Perception	Robotic arms, sensors	USA
December 4, 2013	Redwood Robotics	Robotic arms	USA
December 5, 2013	Meka Robotics	Robots	USA
December 6, 2013	Holomni	Robotic wheels	USA
December 7, 2013	Bot & Dolly	Robotic cameras	USA
December 10, 2013	Boston Dynamics	Robotics	USA

III. Work: rise of the machines

Google and Foxconn collaborating on a new 'vision' of roboticized factories

By [Vlad Savov](#) on February 11

Business

Google, Foxconn team to build ROBOT ARMY

Foxconn to realize 30% automation by 2020

GBTIMES BEIJING - GBTIMES BEIJING
2015/07/03

III. Work: rise of the machines



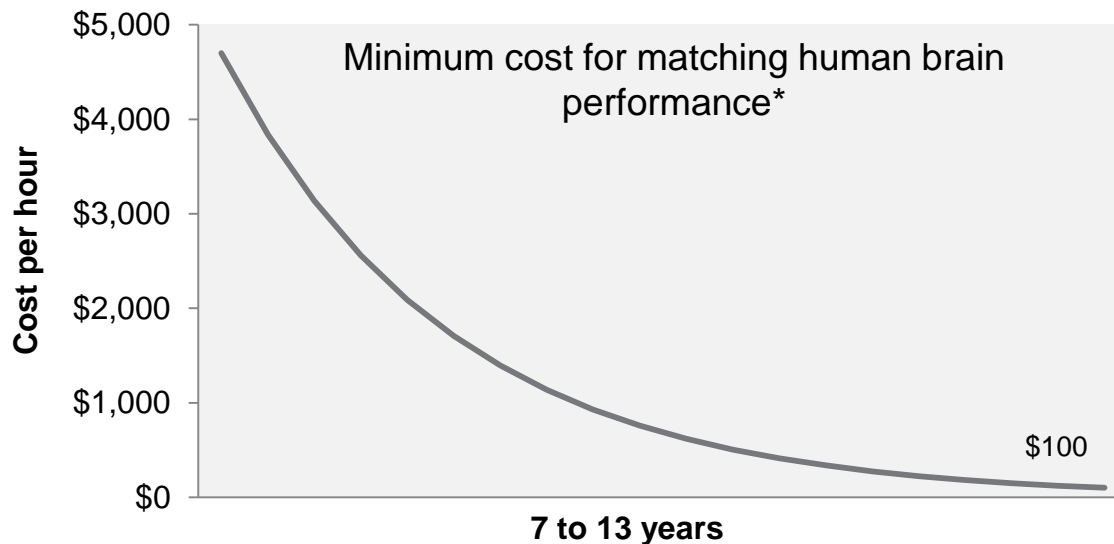
Photo credit: Argonne National Laboratory



Photo credit: Flickr @A Health Blog

III. Work: rise of the machines

We can still outthink computers, but for how much longer?



Source: Projection by AI Impacts, 2015

*Measured in traversed edges per second (TEPS)

III. Work: rise of the machines

Google's 2014 acquisitions were heavily focused on AI

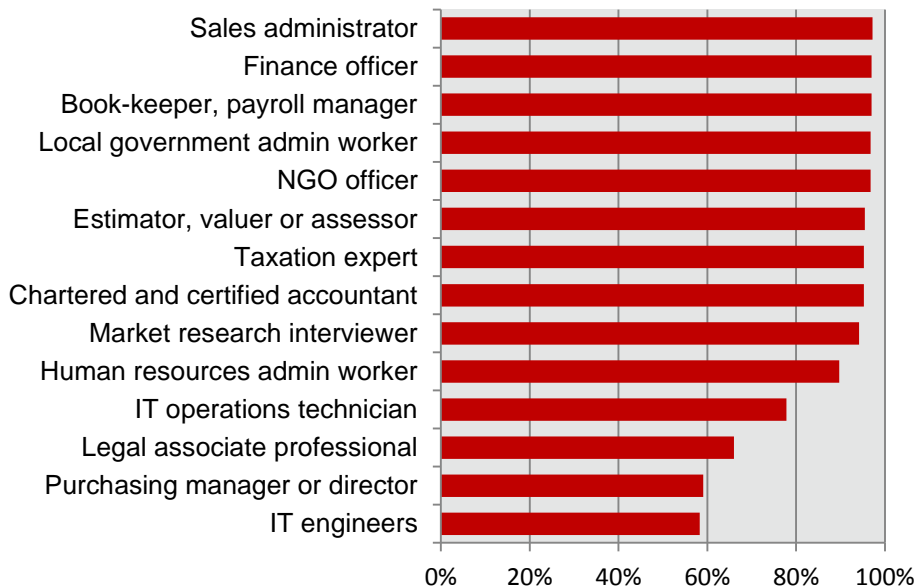
Date	Company	Specialisation	Country
January 26, 2014	DeepMind Technologies	Artificial Intelligence	UK
August 17, 2014	Jetpac	Artificial intelligence, image recognition	USA
October 23, 2014	Dark Blue Labs	Artificial Intelligence	UK
October 23, 2014	Vision Factory	Artificial Intelligence	UK

Toyota Invests \$1 Billion in Artificial Intelligence in U.S.

By JOHN MARKOFF NOV. 6, 2015

III. Work: rise of the machines

High risk of being replaced by automation



Low risk of being replaced by automation

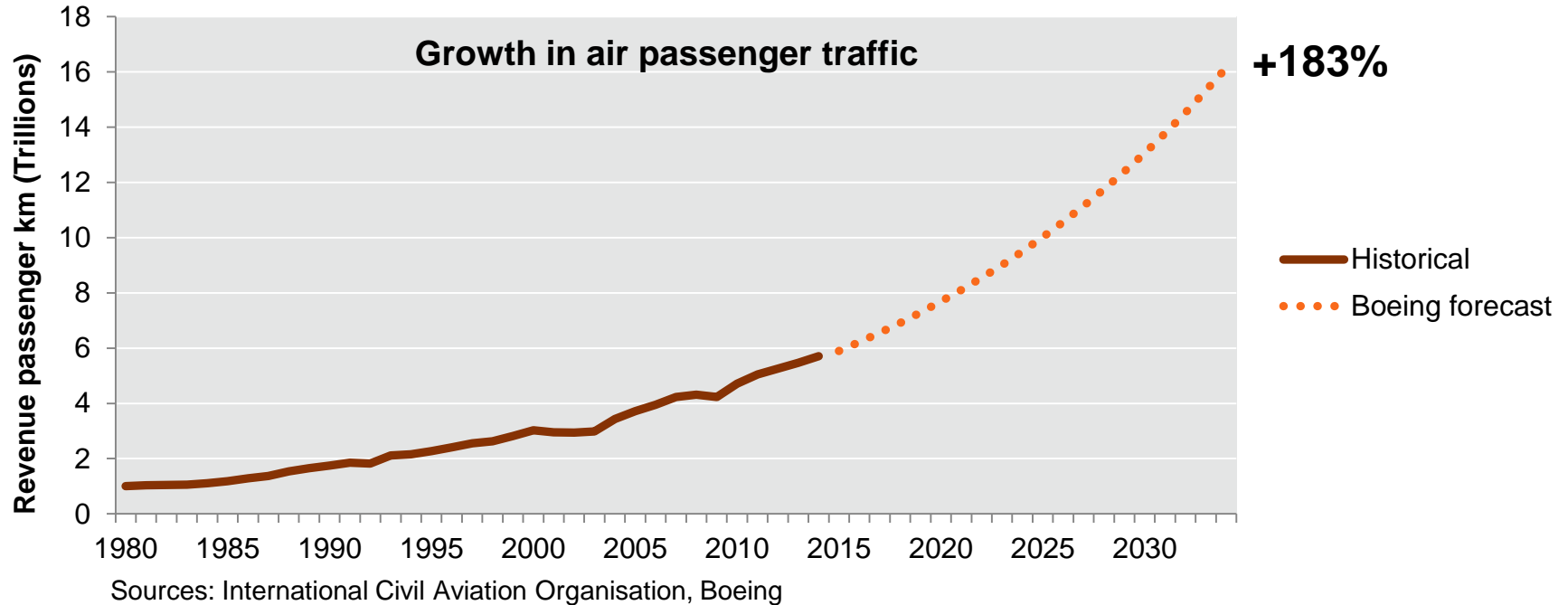


Sources: Deloitte, University of Oxford, BBC

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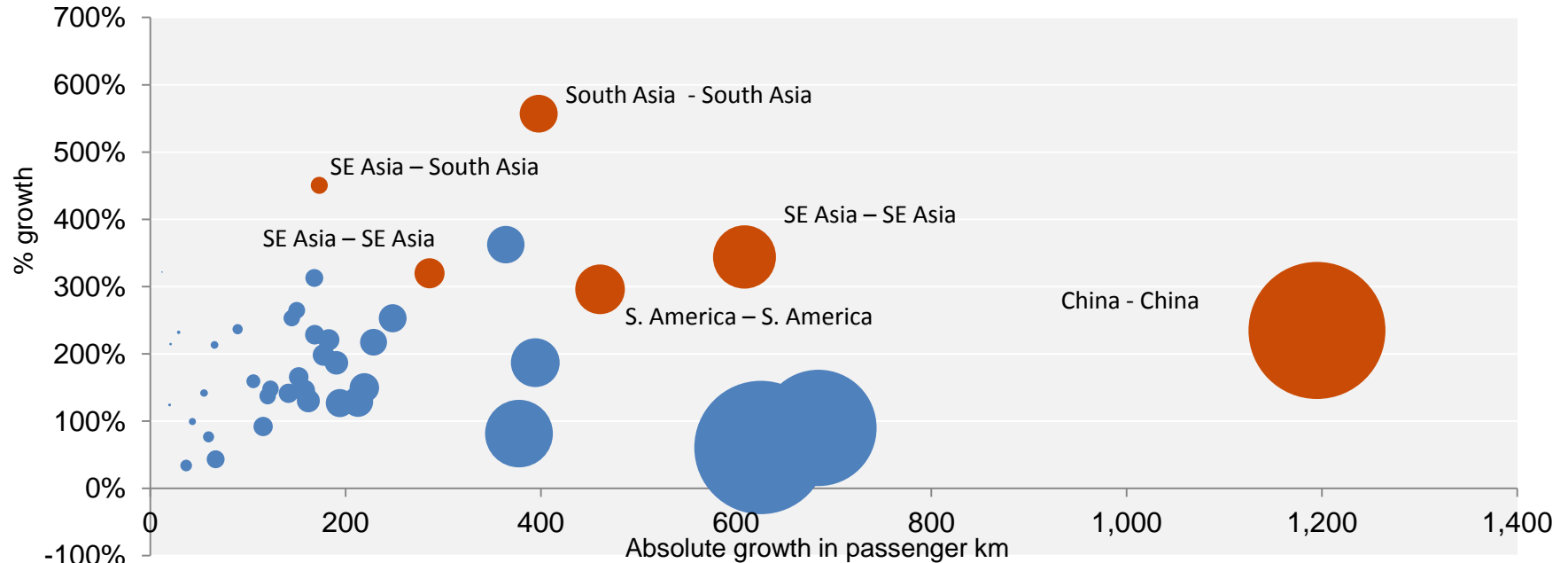


IV. Mobility: a regional kind of globalism



III. Mobility: a regional kind of globalism

Growth in regional traffic will outpace growth in long-haul traffic

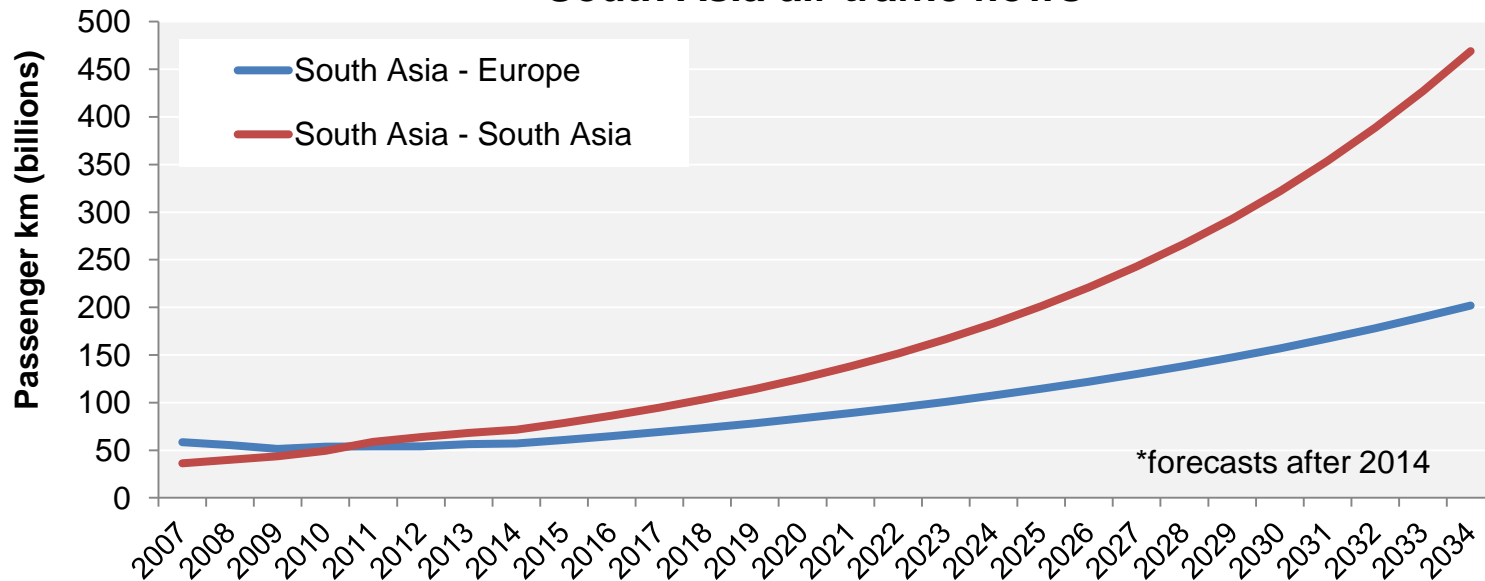


Source: Boeing

IV. Mobility: a regional kind of globalism

Growth in regional traffic will outpace growth in long-haul traffic

South Asia air traffic flows



Sources: International Civil Aviation Organisation (historical), Boeing Current Market Outlook 2015 to 2034 (forecast)

IV. Mobility: a regional kind of globalism

PWC's rank of top 30 urban areas in 2030 shows a shift away from the West

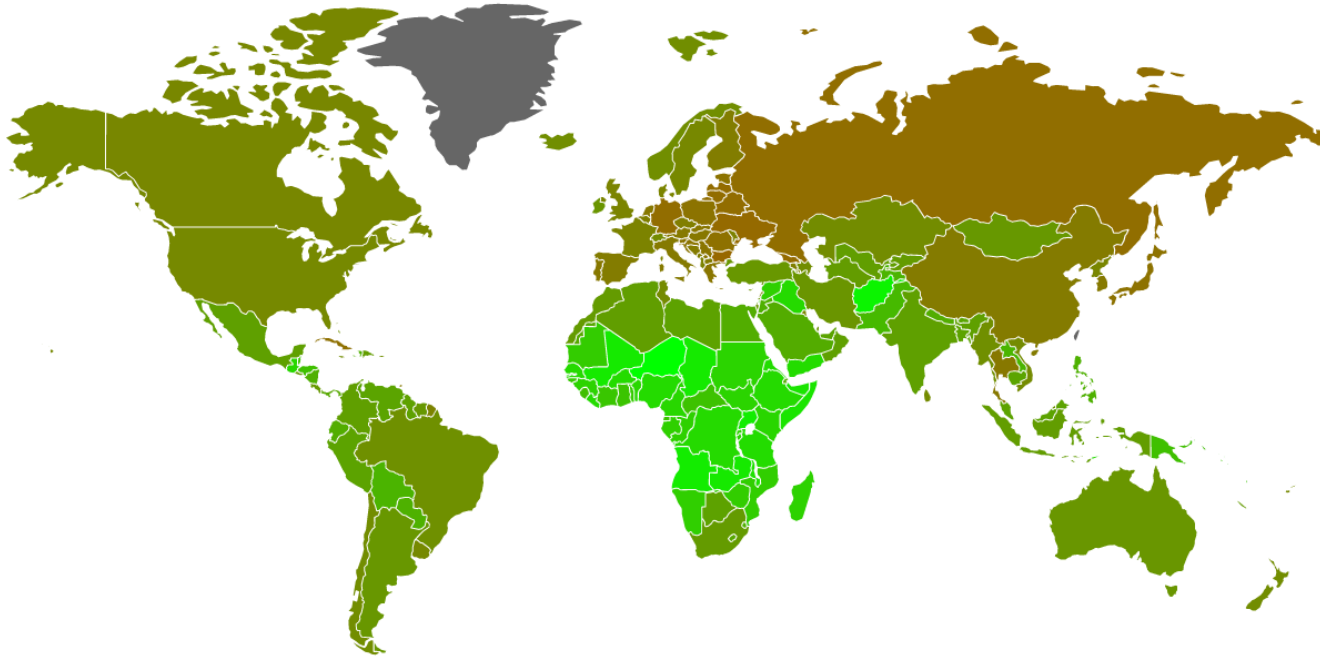
Rank	City
1	Tokyo
2	New York
3	Los Angeles
4	London
5	Chicago
6	Sao Paulo
7	Mexico City
8	Paris
9	Shanghai
10	Buenos Aires

Rank	Urban area
11	Mumbai
12	Moscow
13	Philadelphia
14	Hong Kong
15	Washington DC
16	Osaka/Kobe
17	Beijing
18	Boston
19	Dehli
20	Dallas/Ft. Worth

Rank	Urban area
21	Guangzhou
22	Seoul
23	Atlanta
24	Rio de Janeiro
25	San Francisco/Oakland
26	Houston
27	Miami
28	Istanbul
29	Toronto
30	Cairo


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V. Conclusion: three big questions for 2030



V. Conclusions: How are you aligned?

Education needs will diverge according to labour force trends

Fast decline	Moderate change	Fast growth
<ul style="list-style-type: none">• Mid-career/professional training• Oversupply HE• Demand for international students• Focus on high-value research		<ul style="list-style-type: none">• Teacher shortages• Basic workforce skills• Undersupply of managers• Rapid rise in demand for HE• Digital learning???

V. Conclusions: How long are your algorithms?



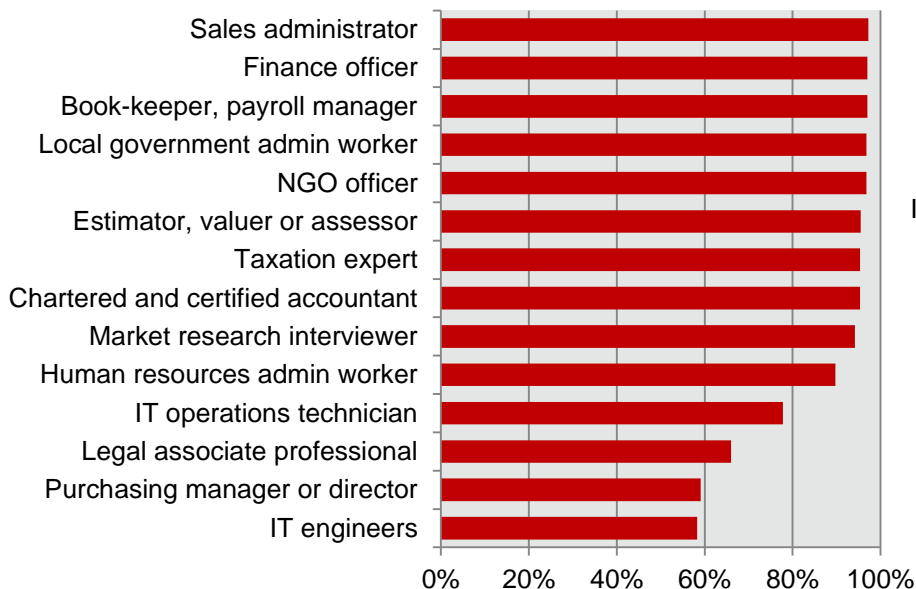
Photo credit: Argonne National Laboratory



Photo credit: Flickr @A Health Blog

V. Conclusions: How long are your algorithms?

High risk of being replaced by automation



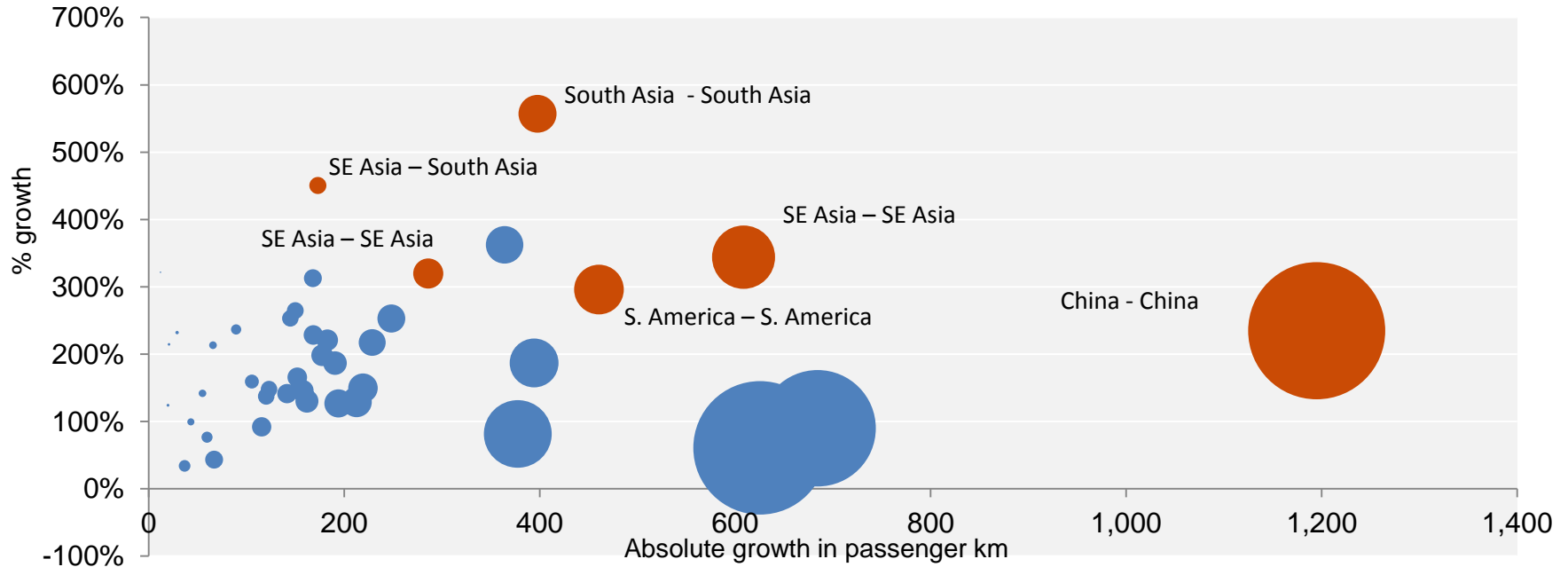
Low risk of being replaced by automation



Sources: Deloitte, University of Oxford, BBC

V. Conclusions: Where is your place in the world?

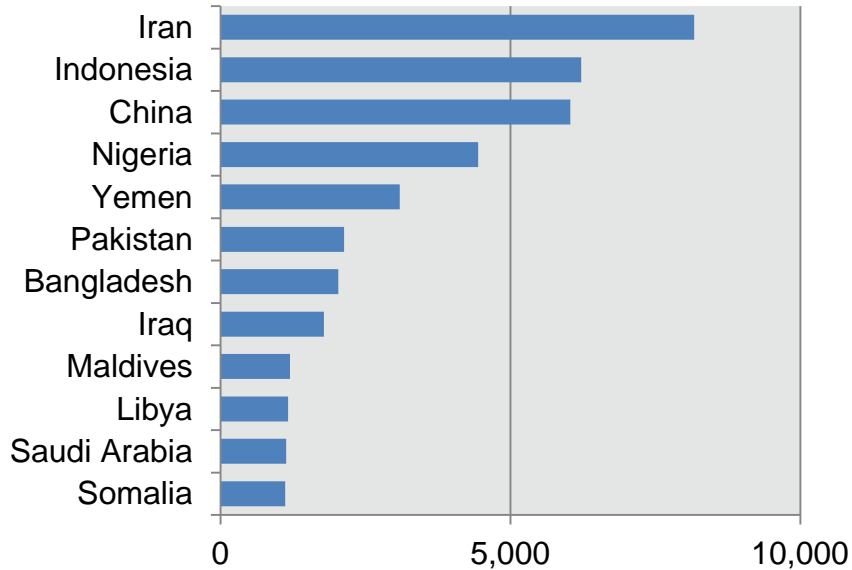
Growth in regional traffic will outpace growth in long-haul traffic



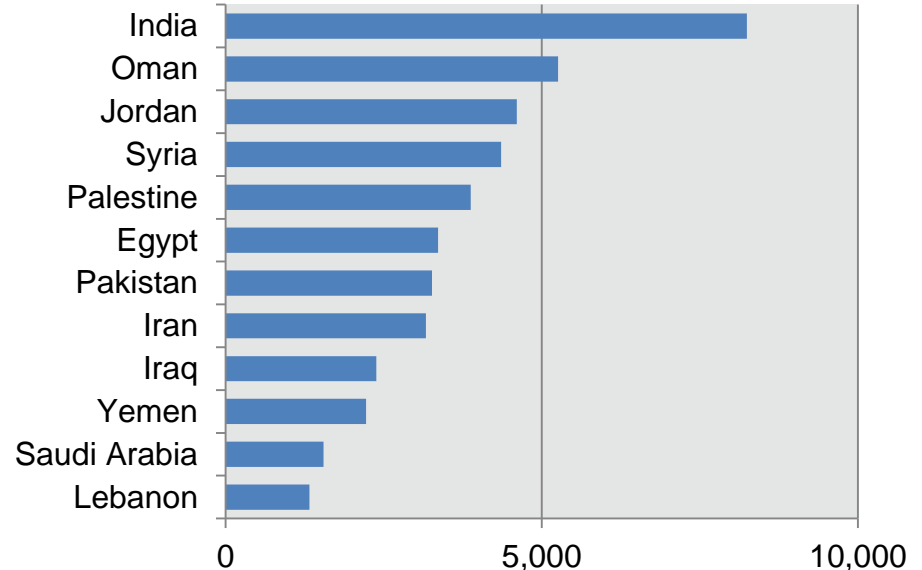
V. Conclusions: Where is your place in the world?

Emerging regional study hubs are small but well connected to quickly growing markets

Malaysia: top 10 sending countries



UAE: top 10 sending countries



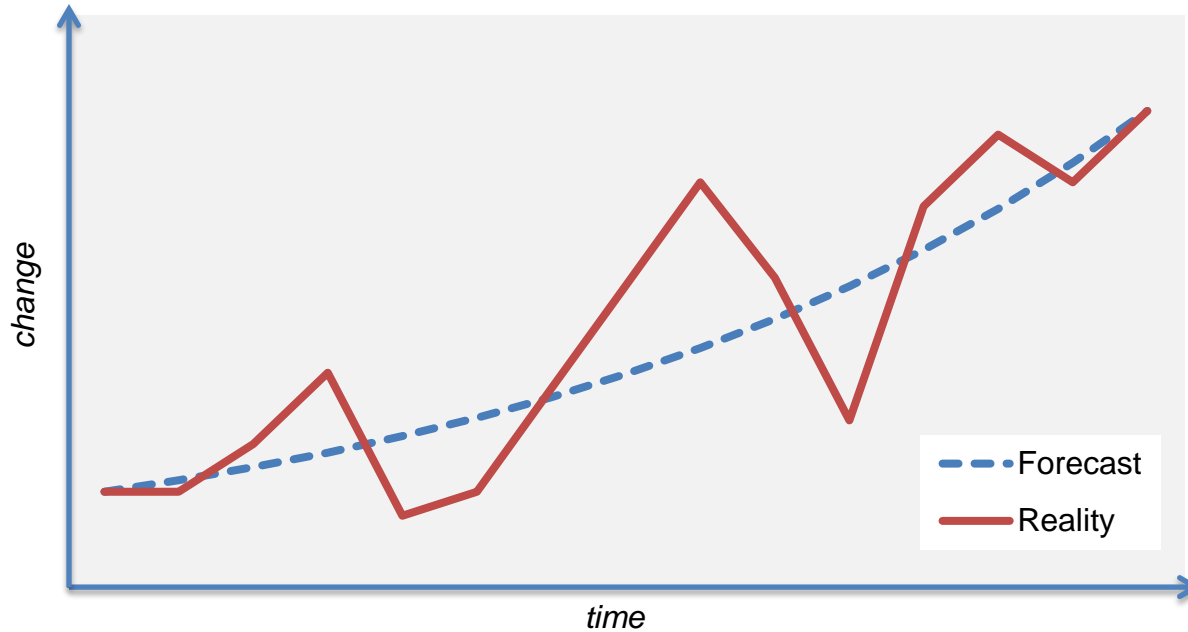
Source: UNESCO

V. Conclusions



V. Conclusions

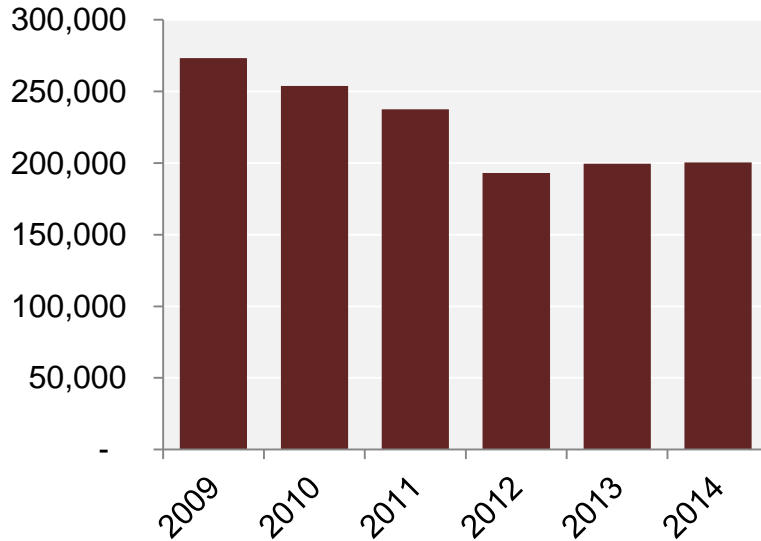
What's driving volatility in our markets?



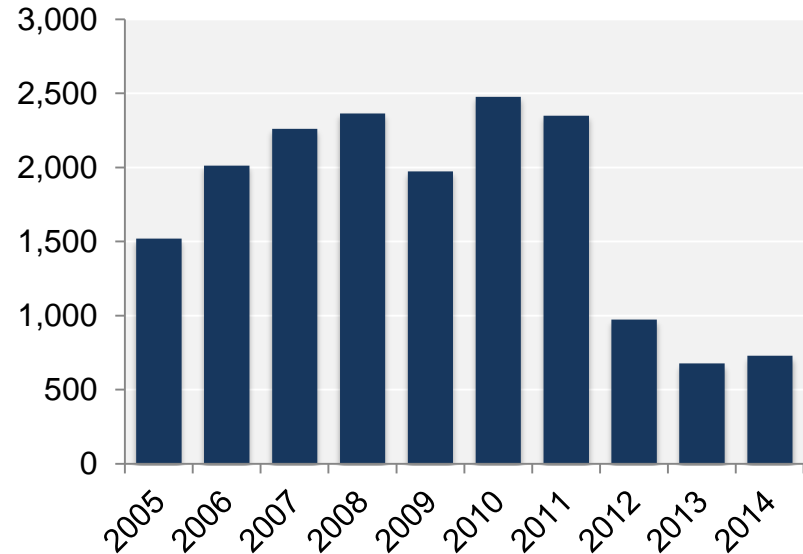
V. Conclusions

The key drivers are rarely simple demand side issues

UK tier 4 study visa issuance



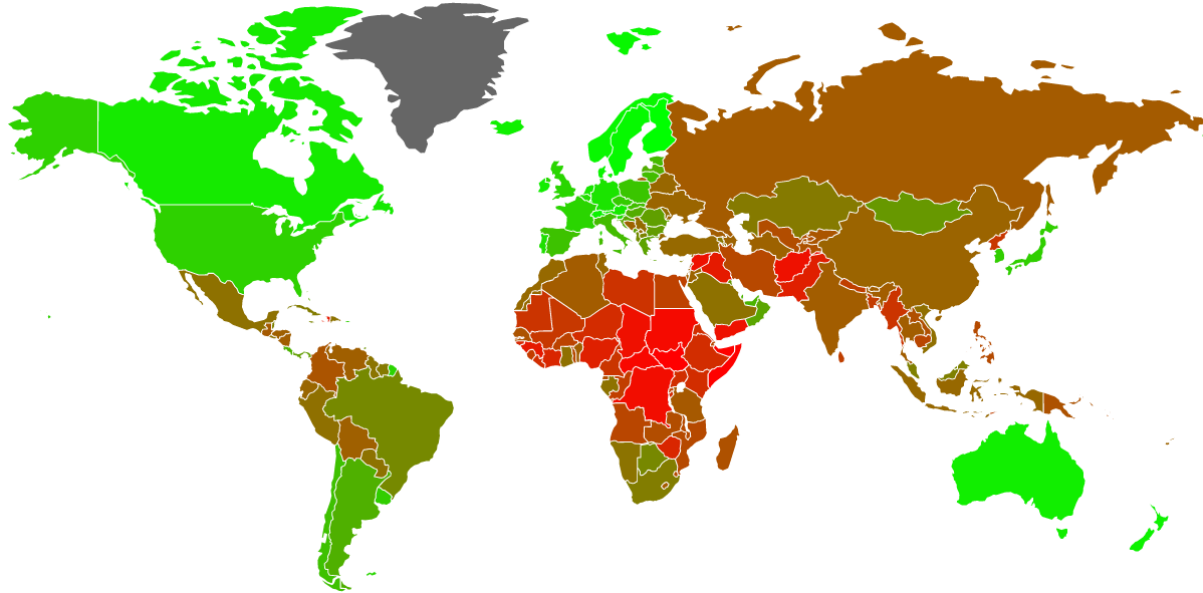
UK study visas issued to Iranian nationals



Source: UKVI

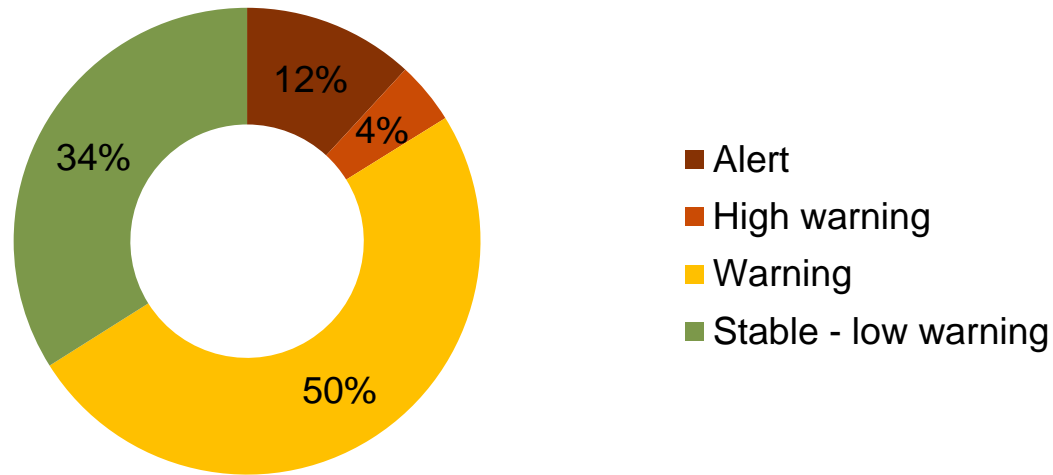
V. Conclusions

The Fund for Peace 2015 Fragile States Index



V. Conclusions

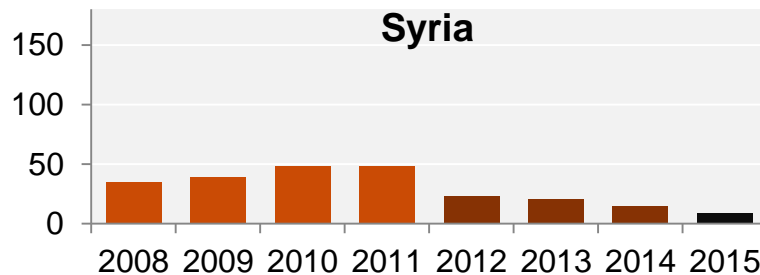
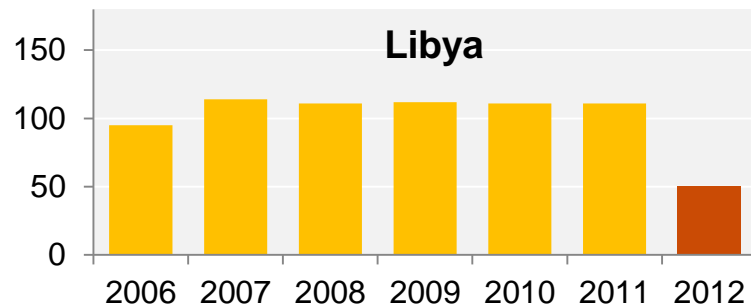
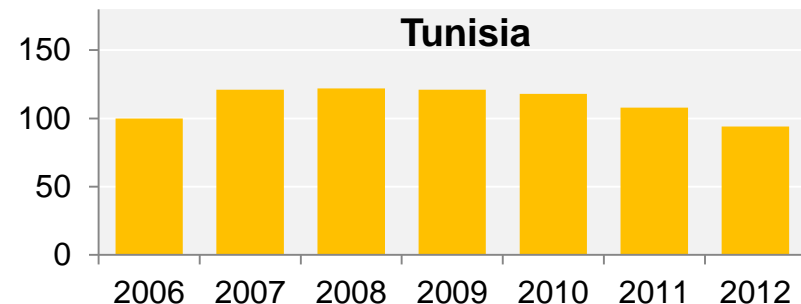
UK study visa issuance by Fragile States Index score



Source: FFP Fragile States Index 2015

V. Conclusions

...but the fragility of states has a poor track record of predicting the breaking point



Source: FFP Fragile States Index 2015

V. Conclusions



Questions?

*British Council's **Services for International Education Marketing** (SIEM) team helps UK institutions refine their internationalisation strategies to succeed in East Asia and around the globe. Please get in touch if you would like to learn more.*

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