

**METHODOLOGICAL CHALLENGES IN ESTIMATING THE MARKET SIZE OF  
"EDUCATION EXPORT"**

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The global financial crisis of 2008 triggered a rise in "education export" worldwide, yet its full scope and characteristics remain insufficiently understood. This research investigates the dynamics of policy transfer through economic transactions, building upon the foundations of comparative education studies. The objective is to analyze the global market for education export, examine international capital flows, and identify structural challenges.

Countries such as Finland and Japan, which received international recognition through the OECD's Programme for International Student Assessment (PISA), have actively pursued education export. For instance, Finnish-style primary and secondary schools have been established in Qatar and China to deliver local education using Finland's educational practices. Similarly, Japan launched the "EDU-Port Japan" initiative in 2015 to promote Japanese-style education in Southeast Asia and the Middle East. Other countries, including Singapore, New Zealand, and the UK, have implemented national strategies for education export. Notably, Rugby School Japan was established in 2022 as part of the UK Department for International Trade's education export strategy. However, the overall size, scope, and impact of these initiatives remain largely unexplored.

This study seeks to estimate the market size and trace cash flows within the global education export sector.

## Research Questions

The transfer of educational policies across countries has traditionally been analyzed through the lens of "policy transfer," with a primary focus on political motivations and national autonomy. However, the emerging phenomenon of education export involves policy transfer through economic transactions. These transactions, often framed as mutually beneficial contracts, obscure underlying power dynamics and complicate the analytical process. This study, therefore, seeks to address the following questions:

1. How can the market size of global education export be estimated?
2. What are the primary methodological challenges in measuring the market?
3. How do national approaches to education export influence estimation processes?

## Objectives and Methodology

The main objective of this research is to clarify the methodological challenges involved in estimating the global education export market. Existing international frameworks, such as the General Agreement on Trade in Services (GATS), categorize education within "Other personal, cultural, and recreational services," rendering precise analysis difficult. This study adapts GATS classifications to encompass primary and secondary education and examines previous estimation efforts by the UK and Finland. Interviews with key authors of these reports provide additional insights into the methodologies employed.

## Expected Findings

### 1. Complexity in Estimating Market Size

Unlike tangible goods, educational services are inherently complex to quantify due to their cultural and policy-driven nature. Education export manifests in various forms, including teacher mobility, school establishment, and curriculum

dissemination, each with distinct economic implications. Integrating these diverse elements requires standardized data collection protocols and reliable evaluation frameworks.

## 2. Divergent National Strategies

National approaches to education export vary significantly. The UK has a longstanding focus on higher education, while Finland has capitalized on its PISA success to export primary education. Japan emphasizes the dissemination of "Japanese-style education," particularly in Asia. These strategic differences influence data collection and complicate cross-national comparisons.

## 3. Data Availability and Reliability

A significant challenge lies in the lack of systematic data collection mechanisms. While the WTO compiles data on trade in commercial services, educational services remain embedded within broader categories, hindering detailed analysis. Effective estimation requires the synthesis of government reports, corporate financial data, and contractual documentation. However, inconsistent definitions and measurement standards across countries impede these efforts.

## 4. Defining the Scope of Education Export

The definition of "education export" remains ambiguous. Should it be limited to educational services and institutions, or should it also encompass digital learning platforms, educational materials, and edtech services? For example, online education platforms, often monetized via third-party advertising, generate revenue streams that are difficult to track within conventional trade frameworks. Clarifying these definitional boundaries is essential for accurate market size estimation.

## Conclusion

Estimating the market size of global education export presents multiple methodological challenges, including definitional ambiguities, data scarcity, and cross-national variability. This study, through the analysis of case studies from the UK, Finland, and Japan, aims to contribute to a more coherent and standardized estimation framework. A comprehensive understanding of these challenges will facilitate more accurate assessments of the education export

sector's scale and economic significance, thereby informing future policy development in the global education market.

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