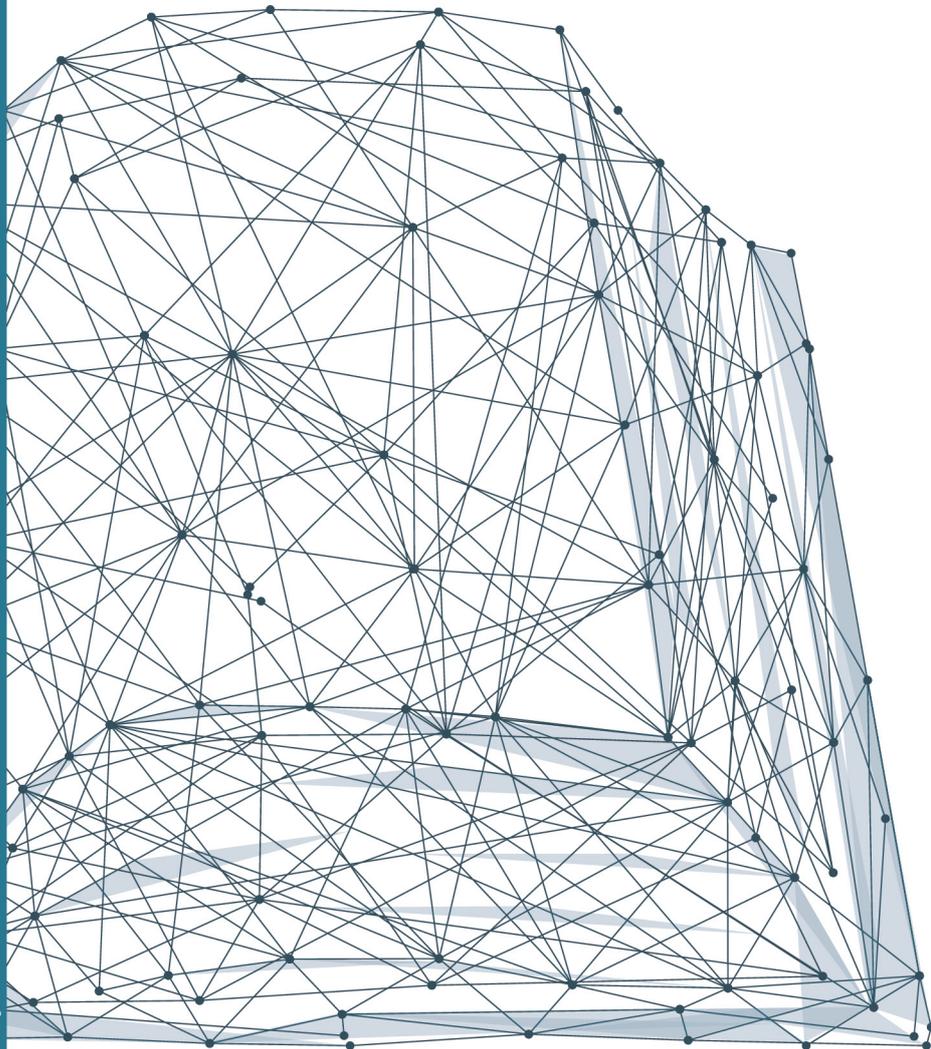


GLOBAL COMPETITION FOR TALENT: A COMPARATIVE ANALYSIS OF NATIONAL STRATEGIES FOR ATTRACTING INTERNATIONAL STUDENTS



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Global Competition for Talent: A Comparative Analysis of National Strategies for Attracting International Students

Rajika Bhandari

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Abbreviations

AACRAO	American Association of Collegiate Registrars and Admissions Officers
ACE	American Council on Education
APEC	Asia-Pacific Economic Cooperation
ASEAN	Association of Southeast Asian Nations
BMBF	German Federal Ministry of Education and Research
BMZ	German Federal Ministry for Economic Cooperation and Development
CBIE	Canadian Bureau for International Education
CSC	China Scholarship Council
DAAD	German Academic Exchange Service
EAC	East African Community
ECA	US Department of State's Bureau of Educational and Cultural Affairs
EdCIL	Educational Consultants of India
ELT	English Language Training
EU	European Union
FOBESII	US-Mexico Bilateral Forum on Higher Education, Research and Innovation
FOCAC	Forum on China-Africa Cooperation
HE	Higher Education
HEA	Ireland's Higher Education Authority
IB	International Baccalaureate
IIE	Institute of International Education (IIE)
MEXT	Japanese Ministry of Education, Culture, Sports, Science and Technology
MHRD	India's Ministry of Human Resource Development
MOOC	Massive Open Online Course
NACAC	National Association for College Admission Counseling
NAFSA	NAFSA: Association of International Educators

NESO	Netherlands Education Support Offices
NIRF	India's National Institutional Ranking Framework
NZ	New Zealand
OPT	Optional Practical Training
PTE	New Zealand's Vocational and Technical Education Sector
QQI	Quality and Qualifications Authority of Ireland
SEVIS	Student and Exchange Visitor Information System
STEM	Science, Technology, Engineering, and Math
TNE	Trans-National Education
TOEFL	Test of English as a Foreign Language
UAE	United Arab Emirates
UK	United Kingdom
UNESCO	United Nations Educational, Scientific and Cultural Organization
US	United States of America

Foreword

Foreword

As the uncertainty and disruption of geo-political shift have become hallmarks of our age, the ancient urge to pursue one's higher education in distant lands is shaped by a raft of new pressures that often have little to do with education. Growing numbers of mobile students are taking advantage of new choices, but also encounter changing immigration and recruitment policies in host countries -as well as trends and restrictions at home- that are part of the larger context of national trade strategies and the exercise of soft power.

This research from our colleagues at the Institute of International Education (IIE), a long-time partner with WISE and Qatar Foundation, is a full portrait of the current state of global higher education for mobile students. The report focuses on the measures the key countries have taken to attract international students, and the motivations that underpin these tactics and strategies. Drawing on IIE's core collaborative research entitled Project Atlas, national policy documents, and broad literature on higher education mobility, the report taps a unique network of institutional expertise.

Among the most significant developments examined in the report is the current shift away from the long predominance of Anglophone countries in the higher education market, toward the emergence of others -including Germany, China, Russia, and other Asian destinations. English language teaching is now common in non-Anglophone host countries, such as Germany. Apprenticeship and internship models are being adapted in China and elsewhere to attract skilled workers to stay.

Of special interest may be the report's exploration of the 'emerging' destinations for higher education, such as China, Japan, the Netherlands, the Republic of Ireland, and others. China's focused approach to building and marketing its higher education sector as a destination, paired with its well-established source of out-going students, are core elements of the ambitious Belt and Road Initiative, and dramatize the pivotal role China plays on the global stage today. At the same time, traditional and established destinations are having to rethink their approach to attracting international students, especially at a time when there is a turn toward populism and nationalism among many western powers. While numbers of overseas students in U.S. higher education remain high, a marked uptick in the numbers choosing other countries signals a perception that the U.S. is less welcoming. Britain's unhinged withdrawal from the European Union (Brexit) -even before it has taken effect- injects regressive dynamics into higher education that deeply impact global mobile young people.

The report touches on the related issues of forced emigration with its devastating impact for the people of Syria and others fleeing conflict, and acknowledges that these stories cannot be adequately told in the space. Yet we can be thankful that the task of assembling accurate and timely information on student mobility worldwide has been taken up and examined in this report. For educators and administrators in all fields, this research is a prerequisite to understanding the big picture dynamism of student mobility, and reflects developments that will impact the emerging character of our global community in profound and lasting ways.

Asmaa Al-Fadala, PhD
Director, Research and Content
World Innovation Summit for
Education (WISE)

Introduction

The scale and volume with which postsecondary students are crossing international borders is unprecedented, and never before have so many countries vied to attract these global aspirants to their shores. At the start of the third decade of the twenty-first century, this student demand for a global education appears to be matched by a potential supply of college seats, with several countries having announced campaigns or set numerical targets to attract the approximately five million students—or “migrants with mortarboards”¹—who are currently mobile. Whether viewed as an export industry that yields significant revenue for a country or as a means of building a talent pool to fill skill gaps and offset a declining domestic population, attracting international students has become a key feature of national-level policies in higher education. The global flow of students—and hence knowledge and talent—plays a central role in broader global debates about the role of skilled migrants; nations as winners and losers and the competing forces of brain-drain, brain-gain and brain circulation; the centrality of borderless knowledge flows to the science and innovation enterprise; and the enduring need for cultural understanding and diplomacy, especially with the recent rise of nationalism and the potential threat of isolationism.

Student demand for a high-quality tertiary education—whether domestic or global—is only expected to grow in the coming years, but what has given new shape to student flows are the many initiatives competing to attract global talent. While Anglophone countries are among the largest hosts of international students and with just five traditional host countries accounting for 50 percent of the world's international student enrollment at the postsecondary level, the past few years have seen a rise in the numbers of countries launching ambitious schemes to attract global talent from around the world, often at lower cost. With the expanding scale of knowledge-based and innovation-driven economies worldwide, countries are turning to international students to provide a pool of global talent and often from which to recruit highly skilled job applicants. These include efforts by non-Anglophone countries in the West, such as France and Germany, but also emerging economies and destinations such as China, Malaysia, and Russia that have initiated policies to not only bolster the enrollment of international students, but to retain them in their labor markets (Knight-Grofe & Rauh, 2016; Hemmadi, 2016; ICEF, 2017; Liu-Farrer, 2009; Nafie, 2017).



¹This term was coined by the Economist in 2013.

With its offer of subsidized degree programs, career incentives, and more English-taught graduate programs, Germany's higher education sector is becoming increasingly attractive. The country surpassed its goal to increase international student enrollment to 350,000 by 2020 in 2017, three years before the target date (Kennedy, 2017; Nafie, 2017). Additionally, international graduates from non-EU countries have 18 months to find employment in Germany and a large number take advantage of this policy. In China, which aspires to host half-a-million international students by 2020 (and is close to reaching that goal), international students are benefiting from new opportunities to undertake internships, smoothed pathways to residency permits, and a variety of programs which enable graduates to stay in-country to work. Several cities – including Beijing, Shanghai, and Shenzhen – have policies to address local skills gaps and create opportunities for international students in high-technology and e-commerce programs to transition easily into the workforce (Sharma, 2018). These efforts go beyond individual countries: long-standing exchange programs, such as Erasmus in Europe, have also recognized the growing demand for employability skills, with internships and apprenticeships comprising recent offerings.

But these efforts to attract more international students do not take place in a vacuum. Paralleling the strong interest in attracting international students, one of the most significant developments in recent years has been the rise of nationalism around the world, and what is perceived as a turning inward of many traditional host destinations that have typically attracted large numbers of students and scholars from around the world. The first such development was the Brexit referendum in the U.K. in 2016, which will likely have far-reaching consequences on student mobility into and out of the U.K., especially the mobility between the U.K. and continental Europe. Similarly, political shifts in the United States and proposed policies restricting immigration and visa issuance have raised many questions about whether the United States might become a less attractive destination for postsecondary international students (QS Survey, 2018) despite a focused effort and commitment by the U.S. Department of State to continue expanding international student enrollments in the United States. While drawing precise conclusions about how student flows are responding to international political changes will require time and new sets of enrollment data, there are early signs that these policy changes are having an impact both on those host countries whose policies might now be viewed as less welcoming as well as those hosts that are seeing increased interest as a result of the redirection of student interest. A case in point is Canada which has seen a significant uptick in international enrollments both due to the liberalization of its own revamped internationalization policies, but also due to students choosing Canada over other destinations.

Given the highly dynamic and shifting current landscape of international student and global talent recruitment, this report takes an in-depth look at the current national-level strategies of various established and emerging host destinations; the relative success of these strategies; as well as what conclusions can be drawn, and projections offered on future demand and supply of international education. The analysis for the report draws upon IIE's Project Atlas network of 25 global international education agencies; various countries' policy documents pertaining to international student recruitment; as well as the vast research literature in the field. Launched in 2001 by representatives from key national bodies and non-governmental organizations involved in international educational exchanges and mobility and now having grown to 25 countries, Project Atlas offers a shared framework for measuring and understanding international mobility and includes data obtained directly from partner agencies around the world. As such, some of the country-level data contained in this report as well as the relative order of top hosts of international students varies from the widely-used UNESCO and OECD mobility statistics.²

Overview of the report and its assumptions

The current report and its analysis is grounded in the following key assumptions:

- **First**, the focus of this report is on one aspect of internationalization—student mobility and countries' efforts to recruit international students. Nonetheless, even though student mobility is still widely regarded as a fundamental pillar of any internationalization effort, other internationalization efforts that focus on scholar mobility and research collaboration,

cross-border education, and internationalization at home are equally critical in developing a comprehensive approach toward the internationalization of higher education (Helms, 2015; Helms & Rumbley, 2016).

- **Second**, because of the report's emphasis on attracting global talent, strategies designed to attract in-bound or international students are the focus of the current analysis, as opposed to strategies or initiatives that countries have adopted to send their own students abroad (although the two are often connected and part of a broader internationalization strategy).

- **Third**, given its focus on national-level policies and wider strategies, institutional-level efforts are not the focus of this report. However, it is important to mention that many national-level strategies—particularly ones that are developed in an inclusive way—encompass and engage the higher education sector and flow down to institutions. Further, national-level policies are often connected or exist side-by-side with state- or provincial-level policies. State-level policies that have focused on international recruitment are noted where relevant (such as in the case of Canada and Australia), but are not the focus of the current analysis.

- **Fourth**, it is not possible in a report of this nature to cover every country and its strategies. Thus, the selection of regions and countries herein is based on criteria such as the status of certain countries as established host destinations as evidenced by their international student numbers, as well as the stated ambitions and well-documented efforts of certain emerging economies and countries.

²See the Project Atlas website for further details: www.iie.org/projectatlas.

- **Fifth**, the forthcoming analysis in the report makes clear that policies to recruit international students are often situated within broader national strategies and efforts related to trade, human capital development, and skills development. While the focus of the report remains on international student recruitment strategies, it is important to note this link.

Finally, as student mobility continues to grow, so do countries' efforts to attract these global aspirants, with new targets and financial investments announced almost on a weekly basis. It is not possible to document all these shifts as they are happening; hence this report includes countries' strategies and approaches in place as of May, 2019. It is possible that new strategies will have been introduced, or others revised by the time this report is released in November, 2019.

The report begins with an in-depth review (Chapter 1) of the growing competition for global talent, situating this phenomenon first and foremost in what the current flows of globally mobile students look like, and followed by a discussion of the key motivations for countries to attract global talent as well as the types of strategies currently in place that embody these motivations and aspirations. Chapter 2 of the report presents brief case studies of seven traditional or established host countries and their student recruitment strategies, marketing campaigns and targets (if any), while also including trends of international student enrollment for each country; Chapter 3 provides a similar analysis of selected emerging destinations.

Chapter 4 situates these national-level efforts in relation to current socio-demographic and political factors that are having an effect on the student mobility landscape, including the rising importance of policies that encourage skilled migration, or the flow of highly-educated and skilled migrants from their home country to another destination primarily to pursue better employment opportunities. This concluding chapter also assesses future prospects for international student growth and identifies ten key takeaways from the current analysis and report.

CHAPTER ONE

The Growing Competition for
Global Talent

This chapter begins with an overview of current trends in student mobility among established and emerging host countries, progressing to broader multi-country approaches that include regional efforts to attract students and the establishment of education hubs. The second half of the chapter examines countries' motivations for attracting international students and how these incentives translate into specific strategies and policies³.

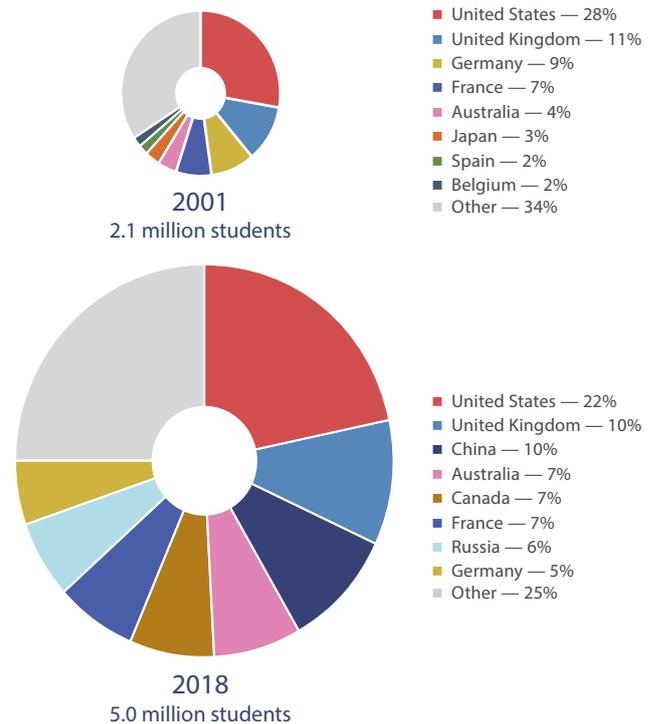
1.1 Status of talent and student flows

Key host and sending countries

The importance of English in shaping international student flows is evidenced by the fact that Anglophone or English-speaking countries attract large number of international students, with the U.S. alone hosting 22 percent of the world's mobile students and the U.K. hosting ten percent (Project Atlas, 2018). Just five English-speaking countries (United States, U.K., Australia, Canada, and New Zealand) together host almost half of all international students. However, non-English-speaking countries such as France and Germany also host large numbers of international students and have seen considerable recent growth due to the provision of courses and programs taught in English (Brenn-White & van Rest, 2012).

In addition to these established or "traditional" hosts of international students, other countries such as China, Russia and the Netherlands are actively recruiting international students, with China accounting now for ten percent of globally mobile students, ahead of many other longstanding host countries (Project Atlas, 2018)⁴. The rise of these newer destinations is due to a complex mix of factors that includes their appeal for students from neighboring countries within the region (especially in the case of China and Russia); enhanced and comprehensive internationalization efforts; and more liberal work and immigration policies. "Regional mobility patterns are partly a function of geographic proximity and historical and cultural ties, as well as concerted efforts at the national or regional level to strengthen connections via student mobility" (Bhandari, Robles & Farrugia, 2018, p. 4).

TOP HOST DESTINATIONS, 2001 & 2018



Source: Project Atlas, 2018; UNESCO, 2018

Figure 1: TOP HOST DESTINATIONS OF GLOBALLY MOBILE STUDENTS, 2001 & 2018

³Portions of this chapter have appeared in Bhandari, Robles and Farrugia (2018); Farrugia and Bhandari (2018); and the Open Doors Reports on International Educational Exchange, 2016 and 2017.

⁴Based on Project Atlas data obtained from the Chinese Ministry of Education, China is now the third top host of international students. However, these numbers might not align with those of UNESCO due to definitional and measurement differences.

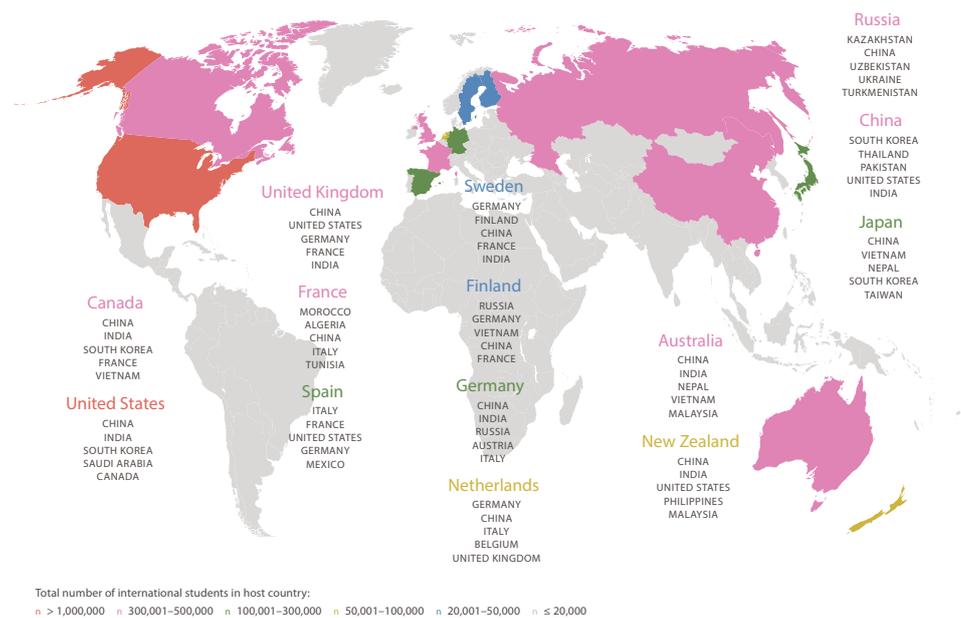


Figure 2: LEADING PLACES OF ORIGIN OF INTERNATIONAL STUDENTS BY HOST COUNTRY, 2018

Which countries are "supplying" the world's international students?

Student flows over the past century have been primarily from the developing to the developed world, or from the global South to the global North (with the exception of a strong tradition of educational exchanges within Europe). Worldwide, three of the five largest senders of students for overseas study in 2016 were in Asia, namely China, India, and South Korea; these three countries together account for 25 percent of all outbound students (UNESCO, 2018). However, the rise of non-traditional and emerging destinations is beginning to disrupt these historical patterns, with a growing number of students studying within their geographic region or even choosing to stay home due to expanded capacity within their home country to offer quality higher education. For example, students from within the Asia-Pacific region accounted for 36 percent of the 1.3 million international students hosted by countries in the region in 2016, primarily due the large shares of three top hosts in the region:

Australia, China, and Japan. In some key destinations in Asia, other Asian students make up a much larger proportion of the total international student body: Hong Kong (91 percent), Japan (87 percent), and South Korea (75 percent) (Project Atlas, 2017; UNESCO, 2018).

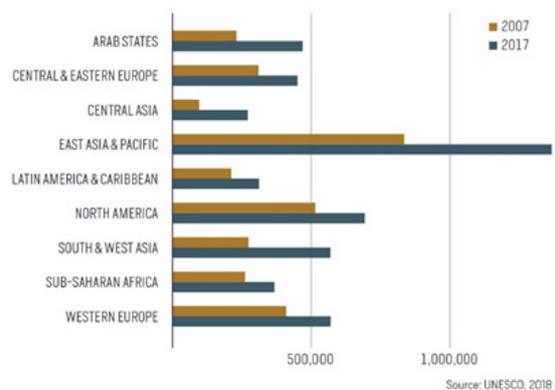


Figure 3: OUTBOUND INTERNATIONAL MOBILITY BY REGION, 2007 & 2017

While Europe is the second largest sending region of international students—accounting for 23 percent of the world's globally mobile students in 2016—a large part of this mobility is within region, or from one European country to another largely due to Erasmus and other European Union (EU) funding, and the growing harmonization of higher education systems across the European Higher Education Area (EHEA) which enable credit and degree recognition and credit transfer. Among the more than 878,000 European students who study outside their home country, three-fourths remain within Europe with the top five senders – Germany, Turkey, France, Italy, and Poland – accounting for almost half (48 percent) of this intraregional mobility (Eurostat, 2016; UNESCO, 2017).

Looking beyond the common South to North mobility patterns and increasing regionalization of student flows, other unique patterns exist that are worth noting. One such development is the rapid rise of the numbers of African students studying in China, where China is now the second largest host destination for African students after France (Nakkazi, 2018). This trend reflects the expanding economic and business ties between Africa and China, as well as China's commitment to provide scholarships to African students. In 2000, the bilateral Forum on China-Africa Cooperation (FOCAC) was established to advance Sino-African collaboration in several areas, including education. The Forum's educational initiatives include Chinese scholarships for African students and professionals to study or train in China, as well as Chinese investment in African schools, development of institutional partnerships between higher education institutions in Africa and China, and investment in Africa's research capacity (Obamba, 2013). At the 2018 FOCAC meeting, the Chinese government expanded its support to include 50,000 government scholarships and 50,000 training opportunities (Nakkazi, 2018).

Additionally, thousands of African students (an estimated 18,000) study in China using their own funds (Allison, 2013; King, 2014). Other unique mobility patterns include sizable numbers of francophone African students in France as well as Latin American students in Spain, both due to factors such as shared languages and historical ties.

A regional approach to attracting talent

Bi-lateral and multi-lateral government-driven regional initiatives focused on student mobility or academic exchange are often a component of comprehensive initiatives to foster diplomatic, economic and trade ties. Some of the earliest such initiatives include Europe's Erasmus program, along with ASEAN (Association of Southeast Asian Nations) and APEC (Asia-Pacific Economic Cooperation) in Asia. Two recent initiatives involving the U.S. include the Bilateral Forum on Higher Education, Innovation, and Research (FOBESII), a U.S. and Mexican government initiative to strengthen U.S.-Mexico academic exchange that is aligned with broader development efforts (Farrugia & Bhandari, 2018). Further, as part of FOBESII, the Mexican government established *Proyecto 100,000* with the goal of sending 100,000 Mexican students to study in the United States and attracting 50,000 U.S. students to Mexico. A second U.S. initiative includes the **100,000 Strong in the Americas** "Innovation Fund" which was launched in 2011 to encourage increased student mobility between the U.S. and Latin American countries.

In addition to the European efforts discussed in a preceding section, in recent years, harmonizing education provision across regions has become critical for countries seeking to strengthen their higher education sectors. East Africa is an example of a locale that is expanding its links and promoting mobility within the region. While East Africa is comprised of a diverse set of countries, there are some common issues that hinder academic mobility into and out of the region, not least of which are the difficult socioeconomic and political environments in which many universities function. Significant and persistent challenges for students who wish to study abroad include: university management issues; questions about the quality of education and the transferability of credits; and difficulty retaining intellectual capital at the faculty level (Teferra & Altbach, 2004; UNESCO, 2017; Waruru, 2017b). Nonetheless, coordinated efforts are being made to address some of these challenges and promote mobility within the region with higher education harmonization announced as a priority of the recently established East Africa Higher Education Area. Formalized during the 18th Ordinary Summit of Heads of State of the East African Community (EAC) in May, 2017, five countries head the initiative – Kenya, Uganda, Tanzania, Rwanda, and Burundi. The agenda includes the development of regional standards, guidelines, and national commissions and councils for higher education. To facilitate student flows at the national and regional levels, EAC students will be able to enroll in any of the 100 universities in the region without taking a special exam, and credits will be transferable across institutions (Waruru, 2017a).

Branch Campuses and Education Hubs: An alternate approach to attracting talent

The branch campus model and, more recently, the emergence of regional education hubs, present new and different approaches adopted by certain countries to draw talent and investment to their shores. Although



they are often not part of a clear national-level internationalization strategy, we include them in this report because one of the main reasons for a country to host branch campuses or to position itself as a hub is to attract international students. While branch campuses are a *“satellite operation of a recognized higher education institution or provider which offers academic programs and credentials in a different country than the home institution”* (Knight, 2008, p. 181), a hub can include different combinations of domestic institutions, international branch campuses, and foreign partnerships

“and reflects a country’s plan and priority to serve and be recognized as a center of education expertise, excellence, and economic activity in the region and beyond” (Knight, 2018, p. 638). The total number

of branch campuses globally has increased from 24 in 2002 to 249 in 2015, with most hosted in the Asia Pacific region, in Europe and in the Middle East (Garrett et al, 2016), with China and Malaysia being key hosts in Asia. Currently, Botswana, Malaysia, Singapore, Qatar, and the United Arab Emirates (UAE) are considered education hubs, along with Hong Kong (Knight, 2014).

Overseas campuses, often belonging to parent institutions in the U.S. and the U.K., offer the opportunity for domestic students in the host country to enroll in well-known and highly ranked institutions and receive an education that is international in nature. They also attract a significant proportion of international students who can enroll in English-taught courses and receive a foreign credential while remaining close to home (British Council, 2014). Through such campuses, host countries are also able to attract top international faculty to teach on a visiting or rotational basis, thus raising the overall global competitiveness and appeal of their country as a destination (Dessoiff, 2012). However,

despite their appeal with international students, it is difficult to ascertain proportions of enrollment on such campuses among international, domestic, and even expatriate students. As Knight puts it, *“In this case, what is their [branch campus students’] country of origin—the one where they have lived all of their lives or their country of citizenship? The situation is murky”* (Knight, 2018, p. 653).



1.2 Why attract international students? Countries' Motivations and Incentives

Ever since the first scholars and philosophers traveled in the pursuit of knowledge, many countries have had a long tradition of educational and cultural exchange through the flows of students and scholars. Mobile students are seen as bringing new ideas and perspectives and as being fundamental to higher education and learning. For governments investing in educational and cultural exchange programs, such initiatives have also served as a powerful form of diplomacy and "soft power." In addition to the overall academic and cultural value of educational openness and exchange, there are at least four distinct reasons why countries have worked to attract international students. Some of these factors are longstanding, while others are newer incentives shaped by changing social, economic and demographic realities.

- **Internationalization of home campuses and creating world-class universities:** International students enable institutions to be global and to have a diverse and multicultural student body. This is particularly important in countries where few domestic students might have the opportunity to study abroad, and whose only exposure to other cultures and viewpoints might be through the presence of international students on campus. More recently, the concept of comprehensive internationalization has also become intertwined with global rankings and the notion that to be "world-class" and globally competitive, institutions also need to have a student body and faculty drawn from all over the world (Hazelkorn, 2015). For instance, many of the global institutional ranking systems such as the Times Higher Ed rankings now include internationalization indicators such as the proportion of the student and faculty body that is international. This has led to the aggressive adoption of an international recruitment agenda by some institutions regardless of whether it aligns with broader institutional goals.



- Building knowledge economies:**
 In countries to which international students are attracted for the STEM fields, they contribute significantly to science and innovation as graduate students, as participants in the workforce, entrepreneurs, and as faculty. For instance, a large proportion of Silicon Valley companies are founded by what are known as new immigrant entrepreneurs, or those who arrived in the U.S. as international students. Another factor is that countries want to encourage skilled migration to meet labor shortages.
- Declining populations and international higher education strategies:** In some parts of the world, including several Asian and European countries, declining birth rates and aging populations are impacting tertiary enrollments (Farrugia & Bhandari, 2016). In recent years, higher education sectors are turning to internationally mobile student populations to help sustain higher education enrollment, but also to meet domestic labor force needs. Initiatives to support this goal include: scholarships; regulations allowing universities to open international departments or programs; expansion of instruction in English; increased post-graduation employment opportunities; and visa changes promoting the transition from student to employee (Custer, 2015; ICEF, 2015).
- Higher education as an export:**
 A key motivation to recruit international students that is less grounded in educational needs and driven more by economic realities is the massive financial contributions of such students to their institutions and the national economy of the host country. In the U.S., international students contributed an estimated US\$42.4 billion to the economy in 2017 through their living expenses, tuition, and fees, and also helped create over 455,000 jobs (NAFSA, 2018). U.S. postsecondary

education is the fifth largest service export for the United States. Although it is sometimes argued that international students displace domestic students in the U.S., recent evidence suggests that the revenue obtained from fee-paying international students helps offset the high costs of a college education for domestic students, particularly in public institutions (Shih, 2017). International students also contribute significantly to the economies of other major host countries: Australia (US\$24.7 billion), Canada (US\$15.5 billion), and the UK (US\$31.9 billion) (Global Affairs Canada, 2017; Maslen, 2019; Universities UK, 2017).

	2017 release	2018 release	% change
United States	1,078,822	1,094,792	1.5%
United Kingdom	501,045	506,480	1.1%
China	442,773	489,200	10.5%
Australia	327,606	371,885	13.5%
France	323,933	343,386	6.0%
Canada	312,100	370,710	18.8%
Russia	296,178	313,089	5.7%
Germany	251,542	265,484	5.5%
Japan	171,122	188,384	10.1%
Spain	94,962	109,522	15.3%
Netherlands	68,475	76,462	11.7%
New Zealand	62,570	61,402	-1.9%
Sweden	35,100	35,862	2.2%
Finland	31,120	30,807	-1.0%
Chile	3,243	3,198	-1.4%

Source: Project Atlas 2017 & 2018

Note: numbers reflect the total international students in each receiving country; release year refers to the calendar year in which the data was released.

Figure 4: INBOUND STUDENTS IN SELECT COUNTRIES, 2017 & 2018

1.3 A classification of key strategies

Building upon the key motivations identified above, this section examines some of the key policy interventions aimed at attracting international students in the short run, but also as a long-term talent pool that is viewed as critical to innovation and advancement. These strategies to attract—and in some cases retain—international students fall into the following four clear categories:

- **Financial incentives such as scholarships, grants and subsidized tuition:** The ability to study abroad is widely regarded as an expensive endeavor, affordable and accessible by a select few. While this report does not offer an in-depth examination of higher education costs and their relationship to student mobility, it is important to note that costs play a significant role in students' decisions about study destinations. Recognizing the importance of making an international education affordable, many countries have made financial assistance a centerpiece of their international student recruitment strategies by either offering subsidized tuition (as in Germany), or by offering scholarships (as in China). One long-running major government grants initiative is the U.S. government's Fulbright program, which is designed to strengthen ties between the United States and countries around the world, while also reaching a diverse group of students and scholars that benefit from the scholarships. For some countries, government scholarship programs are viewed as a form of development aid, with scholarships from developed nations made available to students from developing countries. More recently, Target 4.b within Goal 4 (Quality Education) of the UN Sustainable Development Goals (SDGs) ensures the provision of scholarships to tertiary students from developing countries by developed countries (UNESCO

Global Education Monitoring Report, 2016, 2017). Specifically, the target states: *“By 2020, substantially expand globally the number of scholarships available to developing countries, in particular least developed countries, small island developing States and African countries, for enrolment in higher education, including vocational training and information and communications technology, technical, engineering and scientific programs, in developed countries and other developing countries.”*⁵ However, the current global estimate of the provision of such scholarships is a significant undercount since most developed countries providing such scholarships do not have in place the systems to report data on scholarship recipients (Bhandari & Mirza, 2016; Bhandari & Yaya, 2017).

⁵<https://www.globalgoals.org/4-quality-education>

Policies by Country	providing job related learning & internships	promoting & improving quality of education	easing pathway to skilled migration	providing financial incentives, scholarships	changing curricula & instruction formats
United States	■	■			
United Kingdom		■	*		
Canada		■	■	■	■
Ireland	■	■	■		■
Australia	■	■	■	■	
New Zealand		■	■		
China		■		■	■
Malaysia		■			■
Japan		■		■	■
India		■	*	■	
Germany	■	■	■	■	■
France	■	■	■	■	■

* Indicates the presence of multiple policies that both promote and restrict growth

Figure 5: CLASSIFICATION OF COUNTRIES' POLICIES TO ATTRACT INTERNATIONAL STUDENTS

Strategies to attract global talent



Figure 6: SPECIFIC STRATEGIES FOR FIVE COUNTRIES

- Provision of English-language programs:** Language has always been a driver of global student mobility and most traditional Anglophone destinations have had an advantage over other countries by being able to attract international students who seek an education in English. However, this balance is beginning to shift, with many non-Anglophone countries now offering courses and even full degrees taught in English (Brenn-White & van Rest, 2012). This has great appeal for international students as it gives them a wider array of destination countries to choose from, such as China, Germany and the Netherlands. A potential disadvantage of this approach is that English might eclipse local languages even further, and fewer tertiary students around the world will be motivated to learn a foreign language beyond English.
- Providing opportunities for job-related learning and internships:** The opportunity to gain practical work experience is growing in importance as a driver of student mobility around the globe – both for international students who pursue a full degree in another country and for shorter-term exchange students. In the U.S.,

19 percent of the more than one million international students in 2017/2018 engaged in Optional Practical Training (OPT)—a period of work available for international students who have graduated from a U.S. college or university. Students value practical work experience that will help them secure jobs back home or in their host country, while others may be driven by economic conditions in their home countries that push them to take advantage of study-related work opportunities in the host country. Yet other students value such work-study opportunities as they provide a stepping stone to skilled migration in their host country. Globally, policies governing students' ability to work have impacted international student numbers in top destination countries such as Canada, Germany, New Zealand, the United Kingdom, and the U.S. that have traditionally attracted students not just for study but also for work-related opportunities. For example, in recent years the numbers of Indians students in the U.K. dipped at around the same time that policy changes limited post-study work visas following graduation (Project Atlas 2016).

- **A clear and easier pathway to skilled migration:** Related to the provision of immediate post-study work opportunities is the availability of a clearly articulated pathway from being a student to becoming a skilled migrant. Established host countries of international students—primarily countries in the West—have long relied on the flows of international students, and concomitantly skilled migrants, in building knowledge economies and fueling innovation. Recognizing this critical link between student flows and sustaining a skilled labor force, countries like Canada and Australia that have eased the entry into their labor force are proving to be popular with globally mobile students. A related motivation is that skilled immigrants help offset labor shortages in societies with declining populations or shortages in certain specific fields. The role of skilled migration is discussed in further detail at several points in this report, both in relation to the strategies of specific countries, and in the concluding section of the report.

One approach that undergirds these specific strategies is that of marketing campaigns, where countries invest considerable resources to develop attractive messages through a variety of mediums—digital, print, in-person—to reach and attract international students. Yet these campaigns are typically successful when they are one strategic piece of a comprehensive approach to attracting international students.

Beyond the types of strategies described above, additional strategies fall under the umbrella of institutional and government internationalization efforts, and can include a broad array of exchange programs, informational resources and supports for international students, as well as international partnerships and faculty exchanges. However, despite the proliferation of these strategies and the ambitious targets set by many countries, the relative effectiveness and impact of these strategies is not known, thus limiting future planning and policymaking around internationalization.

CHAPTER TWO

CURRENT POLICIES AND TARGETS:
CASE STUDIES OF ESTABLISHED
HOST COUNTRIES

The primary criterion for selecting the countries included in this chapter is that most are widely regarded as traditional and established hosts of international students and have enjoyed a strong reputation and high visibility as top student destinations. The sections on each country are organized according to the size of their international student populations, beginning with the U.S., host to the largest number of globally mobile students. There is potentially some disagreement in the field about the relative rank or position of some of the countries. For the purpose of this report we rely on information available through Project Atlas which includes mobility data obtained directly from national-level education agencies in key host countries.

Each country case study begins with an overview of the mobility trends to date, followed by any established targets to increase international student enrollment. Targets are included where available; the absence of a target is also noted. Some countries have both economic impact targets and enrollment targets, either one, or none. Some, such as the U.K., also have targets related to growing business overseas. These targets reflect how international education is viewed and the value that it brings to particular countries and economies. The section on targets is followed by a discussion of current key strategies to attract international students. The case studies for some countries include a discussion of current developments as the student mobility landscape for these countries is rapidly shifting, even at the time of the writing of this report in Spring, 2019.



2.1 The United States

Mobility snapshot

The United States is the world's top destination for globally mobile students and has retained this position for many decades. In 2017/18, the total number of international students grew by 1.5 percent to reach 1.09 million, an all-time high but at a lower rate of growth than in past years, which suggests possible slowing growth in the future (Baer, Bhandari, Andrejko & Mason, 2018). Also, this overall increase obscures the fact that the number of students enrolled in undergraduate, graduate, and non-degree programs fell by one percent. Slowing growth in enrollment was evident beginning in 2015/16, but 2017/18 marked the first drop in absolute numbers of enrolled students since 2005/06. Additionally, the numbers of new international students arriving on U.S. campuses—a more sensitive measure of student flows—declined by seven percent in 2017/18. The declines have been due to a mix of factors and have varied across institutional types and regions throughout the United States, with some institutions reporting increases and others reporting flat or declining numbers.

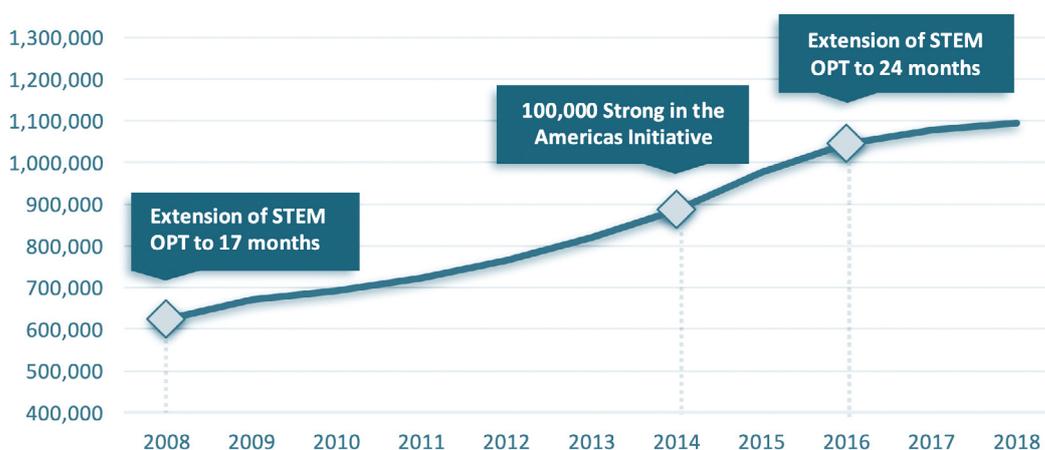
Most of the recent growth in the total number of international students in

the U.S. is due to Optional Practical Training (OPT) opportunities after graduation, with participation in OPT rising by 16 percent between 2016/17 and 2017/18 (Baer et al., 2018). The continued rise of OPT participation is likely due to the STEM (Science, Technology, Engineering, and Math) OPT extension which allows STEM majors to work in the United States for an additional 24 months beyond the standard 12-month period available for all international students.

Although there are over 4,000 colleges and universities in the U.S., only 250 institutions currently host most (77 percent) international students and—overall—international students make up less than six percent of total higher education enrollment in the U.S. (with higher proportional representation at the graduate level).

Target

While the U.S. does not have a specific numerical target for increasing the enrollment of international students, recent statements by senior officials of the U.S. Department of State's Bureau of Educational and Cultural Affairs (ECA) affirm the intent to continue attracting large numbers of international students to the U.S. and to expanding the current levels of enrollment.⁶



Note: International student enrollments reflect the academic term ending that year (i.e. 2008 = 2007/08 academic year)
Source: Project Atlas®

Figure 7: U.S. TEN-YEAR INTERNATIONAL INBOUND STUDENT TREND AND KEY POLICIES, 2008 - 2018

⁶Remarks by Assistant Secretary Marie Royce at the annual Open Doors briefing, Washington, DC, Nov. 12, 2018; remarks by Deputy Assistant Secretary Caroline Casagrande during National Conference Call on Indian Recruitment and Enrollment in U.S. higher education, April 29, 2019.

Key Strategies

The higher education sector in the U.S. is highly decentralized, with most institutions implementing their own internationalization policies and strategies. The U.S. has flourished as a destination for international students and has experienced organic and rapid growth even though its Department of Education does not maintain regulatory oversight of U.S. higher education nor has established a national policy around international higher education—a key difference that sets it apart from other destinations (Helms, 2015). Yet given the history of high international student enrollments in the U.S., some may well question whether the decentralization and independence of U.S. institutions have worked to attract students. Nonetheless—and perhaps to address the gap of a national policy—other U.S. government departments and agencies have developed their own policies and efforts to attract international students. At the national-level, the governmental departments most involved in this endeavor include the U.S. Departments of State and Commerce, as well as specific research agencies such as the National Science Foundation.⁷ While the U.S. Department of Education launched an International Strategy in 2012 titled “*Succeeding Globally Through International Education and Engagement*,” the primary focus has been on internationalizing American education at home, and on expanding foreign language and area studies by providing funding to U.S. students and faculty to go abroad. The strategy does not extend to a broader and integrated approach with the State Department to also attract international students.

The U.S. Department of State has placed value on international educational exchange as a key component of educational diplomacy or “soft power” as embodied in its flagship grants and fellowships programs such as Fulbright,

Humphrey, Gilman, and the Foreign Language Teaching Assistants’ programs that bring thousands of students, scholars, and professionals from other countries to the U.S. and send many Americans overseas. Sponsored by ECA, the Fulbright Program was established in 1946 under legislation introduced by then-Senator J. William Fulbright of Arkansas. The program is administered in partnership with over 155 binational Fulbright Commissions/Foundations or U.S. embassies around the world. To date, the Fulbright program has brought 202,600 individuals to the U.S. to pursue advanced studies.⁸

Also spearheaded by ECA, the *EducationUSA network* plays a critical role globally in disseminating comprehensive and unbiased information to market and promote the U.S. as a higher education destination. The network is present in over 178 countries, with over 400 trained advisers who work in U.S. embassies and consulates, and in partner institutions that include Fulbright commissions, bi-national cultural centers, U.S. non-governmental organizations (NGOs), foreign NGOs, and foreign universities and libraries (EducationUSA, 2019).⁹ Advisers guide prospective international students and their families regarding the admissions process and standardized testing requirements; how to finance a U.S. education; the student visa process; and preparing for departure to the United States.

The U.S. Department of Commerce’s strategy has focused on promoting the business and economic value of international students coming to the U.S. The U.S. Commercial Service, the international arm of the Department of Commerce, works with businesses, education institutions, and overseas recruitment agents to encourage international students to study in the U.S. They assist U.S. higher education institutions through recruitment fairs, webinars, virtual education events,

⁷ See Helms (2015) for a detailed review of U.S. internationalization policies.

⁸ <http://foreign.fulbrightonline.org/about/history>

⁹ <https://educationusa.state.gov/foreign-institutions-and-governments/educationusa-network/educationusa-advisers>

and personalized services, while also providing resources on the international education industry. An annual Education and Training Services Resource Guide provides comparisons and individual market assessments of over 50 countries listed as best prospects for U.S. training and educational services. Over the past twenty years, the U.S. Commercial Service has also supported the development of over 40 consortia of U.S. higher education institutions designed to highlight the United States as a study destination.

The U.S. government provides post-study opportunities in the form of OPT which allows international students in all fields to work after their studies for 12 months, and up to a total of 36 months for STEM students. OPT has been very appealing to international students in the U.S., witnessing a 400 percent rise in participation between 2008 and 2016 (Ruiz, 2018). While recent extensions of the length of OPT from 12 months to a total of 36 months for graduates in STEM fields account for some of the recent surges in OPT

participation, students' willingness to stay on for work in growing numbers and for longer periods indicates how important this aspect of international education is to many students. Work opportunities in the United States are more influential drivers of mobility for students from certain countries than from others. Many students from Asia pursue OPT in relatively high numbers, including those from India, Nepal, Taiwan, and China. Indian students are especially motivated by the opportunity to work in the host country following graduation and are the leading participants in OPT, with 26 percent engaged in OPT in 2015/2016.

Bilateral partnerships with key countries or world regions have also been a key aspect of the U.S. government's strategy to increase student flows between the two countries or regions. These include, for example, the 100,000 Strong in the Americas initiative launched in 2014 by the U.S. Department of State in partnership with NAFSA and Partners of the Americas, with the goal of increasing mobility within the region to 100,000 by 2020 (NAFSA,



2014). Leveraging a public-private partnership model, these initiatives have also relied on corporate sponsorship, donations, and support from foreign governments with support from private sector funders such as ExxonMobil, Santander Bank, CAF Development Bank, and Coca Cola Foundation (Helms & Rumbley, 2016). Other similar efforts have included the 100,000 Strong initiative of the U.S.-China Strong Foundation, and the Passport to India initiative.

Other governmental departments and specific agencies with some initiatives that focus more broadly on internationalization include the National Science Foundation (NSF) and the Department of Defense, though most of their efforts are aimed at enabling U.S. students and scholars to gain global experiences. While the NSF focuses on international collaborations, its initiatives are not explicitly aimed at encouraging the flow of international students to the United States.

Other key players

Given the decentralized nature of international education in the U.S., there are a range of strategies that exist at the state, institutional, and non-governmental levels to attract international students. Although not the focus of the analysis of this report, these efforts are worth mentioning because of the tremendous impact they have on attracting international students to the United States. State-level efforts include the formation of several consortia that promote a particular state as an appealing destination (Kacenga, 2019). Many individual colleges and universities have in place strategies to attract international students, or their own version of a "foreign policy" (Helms & Brajkovic, 2017). While the specific strategies of various institutions are too numerous to list here, one that has gained significant traction over the past few years is the intentional use of social media and campaigns such as #youarewelcomehere.

The latter is designed to reassure international students that the doors of U.S. colleges and universities are open to them despite concerns to the contrary. Many institutions have also established offices abroad, and are also using commission-based agents to assist them with recruiting international students—a practice that remains somewhat controversial, yet is well established in other countries such as Australia and the U.K. and is a growing approach amongst many U.S. institutions¹⁰.

In addition to these efforts at the governmental and campus levels, there is a highly active nonprofit sector engaged in attracting international students, including organizations such as the Institute of International Education (IIE), NAFSA (the Association of International Educators), the American Council on Education (ACE), the National Association for College Admission Counseling (NACAC), the American Association of Collegiate Registrars and Admissions Officers (AACRAO), and others. Given the absence of a coordinated internationalization policy at the national level in the U.S., the importance and impact of the nonprofit sector has perhaps been more critical than parallel actors in other countries where such national-level policies exist.

Current situation

While the U.S. continues to host over a million students and remains a popular destination, recent actual or anticipated changes in student visa, post-study work, and skilled immigration policies already appear to be having a dampening impact on international student enrollments. That said, and as described in greater detail below, these factors appear to be one among several other factors affecting international student enrollment in the U.S. In a snapshot survey of about 500 U.S. higher education institutions,

¹⁰ See the National Association for College Admission Counseling (NACAC) for extensive resources on the use of commissioned agents to recruit international students: https://www.nacacnet.org/knowledge-center/international/Commissioned_agent_series/

49 percent of institutional respondents indicated continued declines in new enrollment in Fall, 2018 albeit at a somewhat lower rate than the prior year; 51 percent reported increased or level enrollments (Baer, 2018). Current evidence also indicates that there is tremendous variability across U.S. institutions and that factors such as whether institutions are public or private, the size and global recognition of an institution, and the geographic location are driving fluctuations in international student enrollment.

Colleges and universities that experienced declines cited multiple reasons: visa processes, global competition from other countries to attract international students, the U.S. social and political climate, and high tuition costs as factors impacting enrollment. Further confirming the findings of the snapshot survey is newer data from the Student Exchange and Visitor Information System (SEVIS) of the U.S. government which also indicates that the number of international students enrolled in U.S. higher education declined by 2.3 percent between March 2018 and March 2019 (SEVIS, 2019). Within this group, all academic levels declined, except for a three percent increase in the number of students pursuing doctoral degrees; the largest declines were among international students pursuing associate degrees or English language training.

Proposed changes of significant relevance to international students include the following: a proposal to limit the duration of status for the F1 student visa which, in effect, would create uncertainty about whether students would be able to complete their programs; proposed changes to the duration of OPT from three years for STEM students to one year for all students; stricter rules around what constitutes "unlawful presence" in the U.S. by international students; increased scrutiny around Chinese students and scholars due to concerns of espionage; and changes to H1-B work visas and other skilled immigration policies which have an indirect effect on the motivations of international students to come to the U.S., many of whom—especially from Asia—are interested in staying on and working in the U.S. The proposed changes to the H1-B policies have mixed implications for international students: while overall there may be more work visas and therefore more opportunities available for those who complete their studies with a U.S. institution, international graduate students will be given preference over undergraduate students, and spousal employment for H1-Bs is restricted, making it more difficult for dual income families and professional to choose the U.S.

To address the concerns around slowing and declining international enrollments in the U.S., some positive developments include an ongoing commitment at the highest levels by the State Department and ECA to attracting international students, as also evidenced by a significant expansion of EducationUSA advising and related activities around the world.

2.2 The United Kingdom

Mobility snapshot

Along with the U.S., the U.K. has long been a top country for international students from around the world, particularly those interested in Anglophone destinations. There were 458,490 overseas students studying at universities in the U.K. in 2017-2018, including over 127,000 European students. At the same time, over 700,000 students study on UK university programs delivered outside the UK. There has been small but limited overall growth in international student enrollments in recent years, but the 15 to 20 percent growth targets and 90,000 raw number growth goals have not been realized. As with the U.S., the UK is enrolling an increasingly smaller portion of all globally mobile students: almost 11 percent in 2012, down to ten percent in 2016 (Project Atlas, 2018; UNESCO Institute for Statistics, 2018).

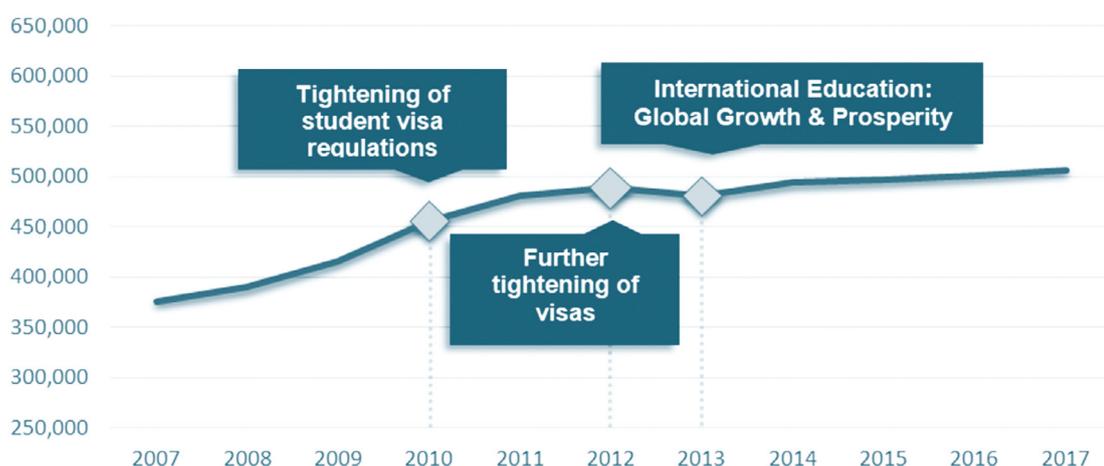
Between 2010 and 2013 several factors led to either the flattening or decline in international student numbers in the United Kingdom. These include the tightening of student visas and post-study work announced in 2012 and enforced in 2013; the lagged effect of the 2008 global financial crisis which impacted self-funded students; and the dip in EU students whose tuition fees tripled in line with the increases in fees for UK students (the EU numbers eventually recovered after four years).

Current target

In 2013 the U.K. had established a target to gain 90,000 extra overseas university students by 2018, but this target has not been met. An additional target included increasing the international higher education market value to £30 billion (US\$38 billion) by 2020. The most current set of targets—established in March 2019—aim to attract 600,000 international higher education students and generate £35 billion (US\$44.3 billion) in export revenues by 2030.

Key Strategies

Recent developments and concerns notwithstanding, the U.K. has always had a strategic approach and strong marketing campaigns in place to attract international students. It is credited with developing the EducationUK national education brand in 2000, which was managed by the British Council and was widely regarded as the first national education brand in the world. More recent efforts—as described below—have been aimed at regaining lost ground in international enrollments and focusing on regions and countries that have traditionally constituted a large recruitment pool for the U.K., while also identifying potential new markets.



Note: International student enrollments reflect the academic term ending that year (i.e. 2007 = 2006/07 academic year)
Source: Project Atlas®

Figure 8: UNITED KINGDOM TEN-YEAR INTERNATIONAL INBOUND STUDENT TREND AND KEY POLICIES, 2007 - 2017



The U.K. government announced its International Education Strategy (IES) in 2013, described in the report *International Education: Global Growth and Prosperity*. Developed jointly by the Department of Education and the Department for International Trade, the key features of this strategy included a specific target of increasing the number of international students in the U.K. by 15 to 20 percent in the following five years (i.e., by 2018); increasing by £30 billion (US\$38 billion) the revenue earned through U.K. educational provision overseas (primarily through TNE, or Trans-National Education); and to attract an additional 90,000 international students (HM Government, 2013).

The IES lapsed in 2018 and has now been replaced by the **International Education Strategy: International Growth, International Prosperity** announced in March 2019 which aims to attract 600,000 international higher education students and generate £35 billion (US\$44.3 billion) in export revenues by 2030 (HM Government, 2019). This new strategy assumes an overall growth of just

under 30 percent in international student numbers and 75 percent in revenue over the next decade. In a bid to address some of the challenges of the past few years, this new strategy extends the post-study work program for international undergraduate and master's students to six months, and to a year for those obtaining a doctoral degree (Civinini, 2019). Other key elements of the approach include better collaboration across various government agencies focused on international education; a newly designated "International Education Champion" role; and ongoing commitment to the GREAT initiative.

Launched in 2015, the "Education is Great" campaign was a new pillar of the U.K. government's comprehensive GREAT Britain campaign, focused on promoting a British education to students in emerging economies, particularly in India where student interest in studying in the U.K. had been waning. Led once again by the British Council, the campaign had a budget of approximately £4 million (US\$5.1 million) in 2016-17, with an additional £6m+ (US\$7.6 million) allocated for subsequent years (Marsh,

2016). This evolved into the Study UK Discover You campaign launched in 2016 and which also focuses on transnational education (TNE). The U.K. has also played a large role in the provision of education overseas. In fact, there are more students enrolled in U.K. courses and programs overseas than are enrolled on campuses in the U.K. itself: almost 708,000 students were on the U.K.'s higher education TNE programs in 2016-2017, 1.6 times the number of international students in the U.K. in the same year (Universities UK, 2018).

The Study UK Discover You initiative offered international students the proposition that by leveraging the best of what a U.K. education had to offer, students could tap into their strengths and define their paths. Study UK Discover You focuses on matching "channels" or outreach with the appropriate audience, including the use of social media, alumni awards, Massive Open Online Courses (MOOCs), and partnerships with higher education institutions.



Source: 'Discover You' Campaign, UK: <https://study-uk.britishcouncil.org/>

Current situation

The past few years have been a challenging time for the U.K. in terms of attracting international students. Although there have been strong campaigns to showcase the U.K. as a welcoming destination (as described above), there have been simultaneous policies and measures that have run counter to these efforts. Most of these restrictive measures have to do with immigration and migration. The U.K. higher education sector witnessed several significant policy shifts between 2011 and 2012, beginning with a March, 2011 government announcement of stricter student visa policies that required institutions to be classified as "highly trusted sponsors (HTS)," as a way to restrict poor-quality institutions from hosting international students. A high-profile case involved the London Metropolitan University whose HTS status was revoked when it was determined that a large number of international students on campus had violated the terms of their student visas (PIE News, 2012). Also, the bar was set higher for students: they were required to have a higher level of English than before (May, 2011). At the same time international students' post-study work opportunities were constricted and there were further limits imposed on whether students could be accompanied by dependents. Most of the declines between 2011 and 2013 were among Indian students due to the additional scrutiny of potential illegal immigration as well as tighter visa processes (Tobenkin, 2014).

Additionally, beginning in 2010, the government has floated controversial proposals to reduce net migration (the difference between immigration and emigration numbers) to the U.K. from approximately 300,000 per year to mere thousands by 2015, with this much lower number to include international students. This proposal was vigorously protested by the U.K. higher education sector but remains an unresolved issue. The slew of changes led to declines of 1.2 percent in enrollment by non-EU international students between 2010 and 2011 and 2015 to 2016 (HESA,

2016). But the enrollment of EU students remained steady because of the generous financial support and academic mobility schemes within the EU (although this is poised to change with Brexit, as discussed below).

In 2018, the UK announced a relaxation of some of the previous student visa policies, extending the list of "fast-track" countries from 15 to 26 to include countries such as Argentina, Bahrain, Cambodia, China, Indonesia, Serbia, Thailand, and easing the stringent educational, financial and language requirements that had existed hitherto. But India, a top-sending country for the U.K. and one that has long-standing historical and cultural ties with the U.K., was not included on the fast-track listing due to the belief that Indian students tended to overstay their student visas once arriving in the U.K. (Sharma, 2018). This has led to Indian students' potentially feeling unwelcome in the U.K. (Kumara, 2018).

At the time of this report's writing, the biggest development for the U.K. is of course "Brexit", with much speculation about how the exit of the U.K. from the European Union will affect the flows of international students from EU and non-EU countries. The U.K. government has indicated that current EU students in the U.K. will not be affected by any changes through the 2019-2020 academic year, but no assurances have been offered for the 2020-21 academic year. If there is no deal between the U.K. and the European Union (a 'hard Brexit'), EU students would be treated the same as other non-EU international students when it comes to visa regulations and fees. Some projections suggest that these developments could result in a significant drop in the numbers of EU students studying in the U.K. in the future. Additionally, post-Brexit, the participation of the U.K. in Erasmus+—the largest mobility scheme in Europe— will be restricted. The potential impact of Brexit on non-EU international students is less clear.

2.3 Australia

Mobility snapshot

Australia has consistently been regarded as a popular destination for international students due to its multicultural educational environment, its position as an Anglophone country, and its convenient location and proximity to Asia. The international education industry is a key revenue source for the country, and it now ranks as the top service export and the fourth largest export industry. In 2018, the numbers of international students in Australian higher education institutions increased by almost 14 percent, totaling 371,885 and reflecting six years of steadily rising enrollments (Project Atlas, 2018; Australian Government Department of Education and Training, 2018). International students at Australian universities increased from almost 22 percent in 2012, to 27 percent in 2016 (Maslen, 2019). Most international students in Australia come from the Asia-Pacific region, with China and India being the leading places of origin. This sustained strong growth and recovery follows a period of declines due to changes in immigration policy that focused on preventing visa fraud; greater scrutiny of the skills of international students in Australia; as well as negative perceptions about personal safety amongst international students, particularly Indian students who had been the target of attacks.

Targets

Australia has not set any targets for international student recruitment.

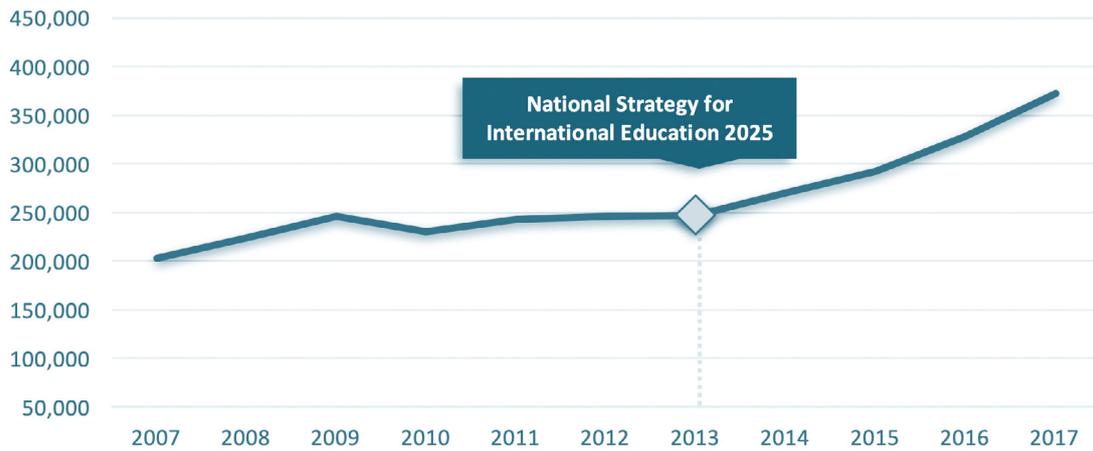
Strategies

A turning point for Australia was 2011 when efforts were launched to address many of the issues that had caused a drop in international enrollments in prior years, including efforts to make students feel safer and streamlining the visa system. The Australian government formed an International Education Advisory Council to examine the challenges facing the sector, which then resulted in the 2013 Chaney Report or the "Australia—Educating Globally"

report, which recommended a multi-sectoral strategy (Commonwealth of Australia, 2013). These efforts culminated in a ten-year National Strategy for International Education 2025, launched in 2016, and involving a collaboration amongst the Department of Education and Training, Austrade, and the Department of Foreign Affairs and Trade (Australian Government, 2016) and an alignment with the government's National Innovation and Science agenda. Another step toward a whole government approach to international education was the formation of the National Council of International Education, constituted at the same time as the release of the new strategy. Chaired by the federal education minister and comprising six federal ministers and 11 non-ministerial expert members, the council was the first of its type in the world.

The new strategy rests on three broad pillars: Strengthening the fundamentals; forging transformative partnerships; and competing globally. Within these, specific approaches have included stronger student support services and protections, and a better student experience; increased quality assurance mechanisms, including a national code of practice for education providers; and expanded opportunities to integrate work and learning opportunities for foreign students (*Australian Government, 2016*).

Other measures include stronger engagement with countries in the region such as China, South Korea and Japan through free trade agreements and other forms of enhanced mobility; better alignment of international education with business, industry and research; and promoting the research potential of various regions within Australia in fields such as agriculture, marine science and tropical medicine. *"In turn, regional communities that have embraced international students have benefited through improved cultural understanding and international connections, helping them reach out to the world"* (Australian Government, 2016, p. 30).



Note: International student enrollments reflect the calendar year, per Australia's academic calendar
 Source: Project Atlas®

Figure 9: AUSTRALIA TEN-YEAR INTERNATIONAL INBOUND STUDENT TREND AND KEY POLICIES

A unique aspect of Australia's overall strategy includes a focus on alumni engagement through the *Australia Global Alumni Engagement Strategy*, intended to forge long-term networks and build sustainable bi-lateral relationships.

Australia's overall international education strategy is also backed by significant and dedicated funding for organizational grants for

implementation through the Australian International Education: Enabling Growth and Innovation Program. As part of the 2016-17 budget, the government earmarked AU\$3 million (US\$2.1 million) in annual funding, and in 2017-18 eligible organizations could apply for grants of up to AU\$250,000 (US\$173,274) to implement relevant projects that position Australia as *"a global leader in education"*





(Australian Government Department of Education and Training, 2017).

While Australia has benefited significantly from revenue from international students, it has also provided a number of scholarships for international students to study in Australia.

It is estimated that the total annual value of the Australian government's investment in international scholarships is AU\$200 million (US\$138.6 million), although these might include scholarships for non-tertiary students as well (Australia Government, 2019). These scholarships have included: the Australia Awards; Destination Australia; the Endeavour Leadership Program (which includes the Endeavour Scholarships and Fellowships and Endeavour Mobility Grants); the Australia APEC Women in Research Fellowship; and the New Colombo Plan. However, in recent developments in March 2019, the 15-year-old Endeavour Leadership Program (ELP) that facilitated two-way exchanges was abolished in favor of 1,000 annual Australian

Government scholarships that are to be shared equally between domestic and international students to study at regional university campuses. The end of the ELP means that there will be no merit-based federal government program to facilitate in-bound and out-bound mobility for Australia. These developments have been met with resistance by the international education sector (Crace, 2019).

Finally, it is worth noting that Australian institutions rely heavily on the assistance of offshore agents to help recruit international students. In this space, the Australian government has played a critical role by issuing strict regulations and codes of practice around the use of agents, including the 2018 National Code of Practice for Providers of Education and Training to Overseas Students (Department of Education and Training, Australian Government, 2018).

2.4 Canada

Mobility snapshot

Canada ranks as the world's sixth most popular destination for international postsecondary students (Project Atlas, 2018), though it is likely that this may change if the current high rate of international student growth continues. While there were 572,415 international students at all academic levels in Canada in 2018, among this total, 435,415 were postsecondary international students, a 17 percent increase over the prior year (Canadian Bureau for International Education, 2019). The overall number of 494,525 exceeded, a full five years early, a previously set target of 450,000 by 2022. International students make up about 11 percent of the postsecondary student population in Canada. The top three fastest growing student source countries (in order) were Vietnam, India, and Iran (although China remains the top source country, with India a close second) (CBIE, 2018). International students contributed almost C\$16 billion (US\$11.9 billion) to the Canadian economy and supported 168,860 jobs (Global Affairs Canada, 2017).

The astronomical rise of international students in Canada has been attributed to the current challenges facing other key anglophone destinations; the loss of international students from those countries has been a gain for Canada. While this might be part of the Canadian success story, it underestimates the very deliberate, strategic and long-term efforts by the Canadian government and individual provinces to put in place strong internationalization and skilled migration policies that appeal to international students.

Current targets

In 2014, the government established a target of 450,000 international students in all education sectors by 2022; as noted earlier, the target was exceeded in 2017.

Current Strategies

The newly restructured Department of Foreign Affairs, Trade and Development, together with the International Development Research Centre; the Department of Citizenship and Immigration; Industry Canada; Employment and Social Development Canada; and other federal departments and agencies collaborate to implement Canada's international education agenda.



Note: International student enrollments reflect the academic term ending that year (i.e. 2007 = 2006/07 academic year)
Source: Project Atlas® (years 2007-2017) and Canadian Bureau for International Education (2018)

Figure 10: CANADA TEN-YEAR INTERNATIONAL INBOUND STUDENT TREND AND KEY POLICIES, 2007 - 2018

Based on an Economic Action Plan in 2011 that included funding for the development of a comprehensive International Education Strategy and the recommendations of an advisory panel, the Government of Canada's [Global Markets Action Plan, International Education Strategy](#), was announced in November 2013 (Foreign Affairs, Trade, and Development Canada, 2014). The plan includes international education as one of the 22 priority sectors where Canada has a competitive advantage. In addition to various governmental agencies, the consultative process of the advisory panel included key stakeholders such as Canadian Bureau of International Education (CBIE); Association of Universities and Colleges of Canada; Association of Canadian Community Colleges; Association des universités de la francophonie Canadienne, among others. With a strategy *“...firmly rooted in the federal government’s focus on creating jobs and economic opportunities,”* funding of C\$5 million (US\$3.7 million) a year was also allocated to implement the strategy (Foreign Affairs, Trade, and Development Canada, 2014, p.13).

As with the strategies of many other destination countries, Canada too aspires to host students from emerging economies and also from countries with whom it has a longstanding relationship such the U.K., the U.S., France, and others.

A strong and visible marketing brand has been a key feature of Canada's approach for several years. The federal Edu-Canada pilot program ran from 2007 to 2012, and included Canadian institutions, embassies, and consulates and by the end of the pilot, international students in Canada had increased by 51 percent (Foreign Affairs, Trade, and Development Canada, 2014).

Canada has also offered scholarships to international students and these are viewed as a form of human capital development, for both students from developed and developing countries. Canada's Economic Action Plan 2013

sanctioned C\$13 million (US\$9.6 million) to the Mitacs Globalink Program, which since 2009 has placed international undergraduates with Canadian faculty to carry out research internships. A parallel portion of the program also provides similar opportunities for Canadians to pursue opportunities abroad. The federal commitments to international scholarships in 2013-14 were over C\$13 million (US\$9.6 million). Foreign Affairs, Trade, and Development Canada offers 700+ scholarships to students in Latin America and the Caribbean, the U.S., China, and Francophone countries around the world. In addition, doctoral and post-doctoral awards (such as Vanier Canada Graduate Scholarships and Banting Postdoctoral Fellowships, which exceeded C\$10 million [US\$7.4 million) in 2012] are available to both Canadian and international students.

Because of Canada's Post-Graduation Work Permit program, *“... many international students transition to permanent residency after entering the workforce through a post-graduation immigration pathway”* (Knight-Grofe and Rauh, 2016, p. 20). In addition to generous post-study work permits, the Canadian government has liberalized its Express Entry visa program which allows an easier and clearer path to permanent residency and citizenship for international students who wish to stay on.

Born out of a skills gap in its labor force and a declining population, Canada's Global Skills Strategy, launched in November 2016, focuses on skilled migration and aims to help companies attract foreign talent and expedite the processes for issuing visas and work permits. Specifically, it reduces visa and work permit processing times to two weeks for certain highly skilled workers; and waives the need for a work permit for short period of work of 30 days or less in certain low-risk fields and for international students wishing to work in Canada during brief academic visits.¹¹ This new strategy,

¹¹<https://www.canada.ca/en/immigration-refugees-citizenship/services/work-canada/hire-foreign-worker/temporary/global-skills-strategy.html>

in combination with Canada's overall openness to residency and citizenship for global talent, makes the country a magnet for international students.

As with the U.S., where strong internationalization efforts exist at the institutional-level, Canada's overall efforts to attract international students are also driven by institutions within each province. The provincial impact of international students is also evident: international students contributed over C\$3.5 billion (US\$2.6 billion) to British Columbia's economy in 2015 and also helped create almost 30,000 jobs (British Columbia Council for International Education, 2017).

Finally, while not at the level of a national strategy, pathway colleges are one of the newest and fastest growing vehicles for bringing international students into Canadian universities and hence deserve mention in this report. Sixty-nine universities in Canada have an affiliation with a pathway college, with most owning the college but others having a partnership with a college that is owned by a private educational company (McCartney & Metcalfe, 2018). Such arrangements have allowed international students who are less academically prepared or lack the requisite English language skills to upgrade these skills at the pathway college prior to transitioning to the Canadian university partnering with the pathway college. Although such programs have a place, critics question the financial motivation of such "middlemen," and whether they might have some unintended consequences for the Canadian higher education sector, including community colleges. *"Whereas differential tuition pricing for international and domestic students has already drawn attention to corporate pricing models, the pathway college model permits institutions and their governing boards to operate a 'test case' for privatization within the walls of the public university"* (McCartney & Metcalfe, 2018, p. 16).

The proliferation of pathway colleges has also added to the overall growing reliance of Canadian institutions on international students as a revenue stream.

2.5 France

Mobility snapshot

In 2018, there were 343,386 international students in France, a six percent increase over the prior year (Project Atlas, 2018). International students now make up about 13 percent of total higher education enrollment in France. This recent period of growth follows several years of declining numbers. Yet France was not among the world's top 20 countries witnessing the strongest growth between 2011 and 2016, leaving its status as a future top host (in absolute numbers) unclear (Campus France, 2018).

Target:

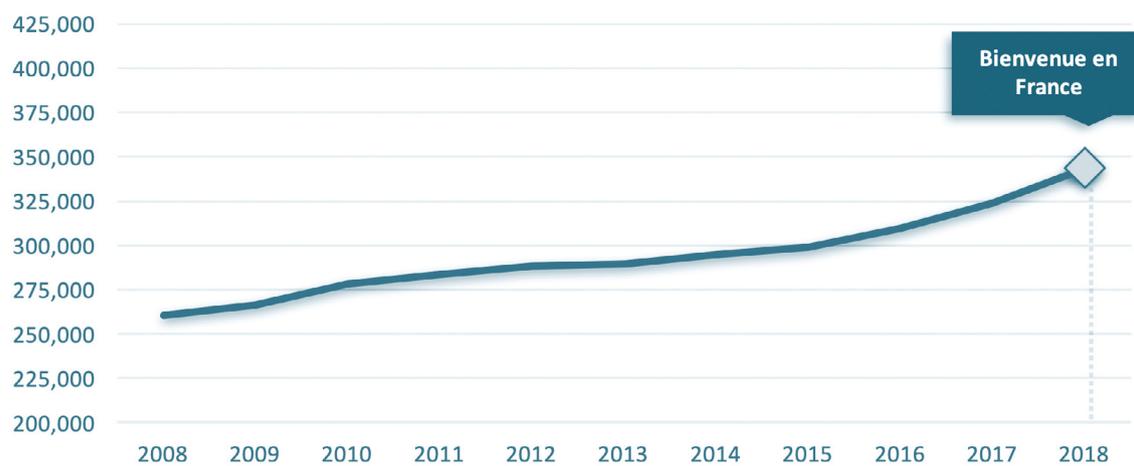
France aims to host 500,000 international students by 2025.¹²

Strategies

Released in 2016 and with the French government and Campus France as key players, [the Bienvenue en France/Choose France strategy](#) is a multi-year effort to increase the number of international students coming to France. Designed to address some issues that have been hurdles to international student recruitment in the past—such as the quality of student-support services—the new approach is based on the following key aspects (Campus France, 2018):

- Simplifying the visa process to include a number of reforms to streamline and ease visa issuance, and to establish a "talent passport" which serves as a multi-year residence permit for skilled foreigners wishing to remain in France;

¹²It is not clear when this target was established.



Note: International student enrollments reflect the academic term ending that year (i.e. 2008 = 2007/08 academic year)
 Source: Project Atlas®

Figure 11: FRANCE TEN-YEAR INTERNATIONAL INBOUND STUDENT TREND AND KEY POLICIES, 2008 - 2018

- Increasing international student enrollment in both intensive French language studies and English-taught degree programs in France;
- Launching a campaign and working with institutions to welcome and support international students;
- Differentiated fees and increased scholarships: in order to increase access and equity, international students' fees will vary based on their origin, with those from outside the European Economic Area or Switzerland paying a higher tuition;
- Increase France's presence and influence abroad through expanded overseas offerings;
- Launch a global communications campaign in 2019 to showcase France as a destination. *“Placed under the auspices of Campus France and with the support of the diplomatic network, this*

multi-media and multichannel communication campaign will broadcast the same message: Choose France / Choose France” (translated from French – French Government, 2018); and

- A new support fund, the *Bienvenue en France* support fund, will be endowed with a significant investment of €10 million (US\$11.1 million).

It is important to note that while the introduction of differentiated fees is intended to level the playing field amongst students, beginning in September 2019 many international students will, in fact, pay a higher fee to study in France. However, the government is also significantly increasing the numbers of scholarships to those who cannot afford to study in France. For example, scholarships offered through the Ministry of Europe and Foreign Affairs will more than double from 7,000 to 15,000 (Mohamedbhai, 2019).

2.6 Germany

Mobility snapshot

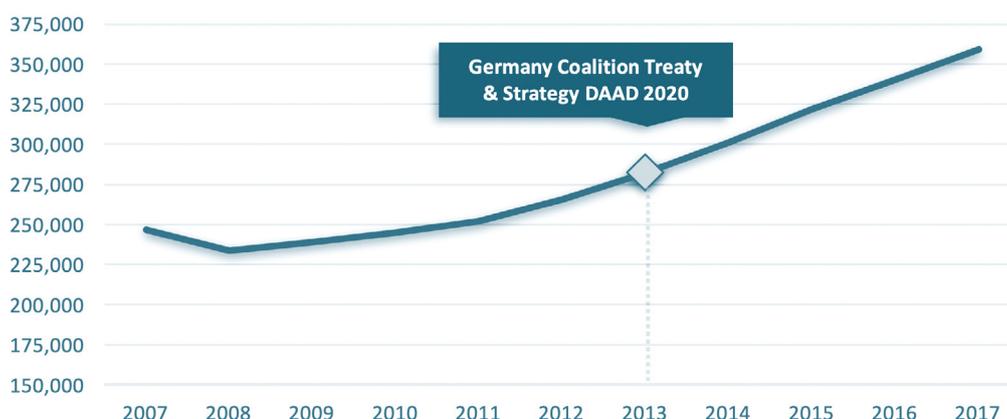
Germany has continued to attract international students both from within Europe and outside of Europe and ranks among the top global hosts for international students. In 2017, 265,484 postsecondary international students were enrolled in German institutions, representing a six percent increase since 2016 (Project Atlas, 2018), and representing 13 percent of higher education enrollment in Germany (ICEF Monitor, 2018). Overall, including international students at all levels, Germany's target of hosting 350,000 international students by 2020 was surpassed in late 2017, three years ahead of the target date (Kennedy, 2017; Nafie, 2017). Rankings by Study.EU have placed Germany at the top for two years in a row as the most desirable European destination for international students (Study.EU, 2018). According to the rankings, Germany's *"...unbeatable combination of world-class universities and a tuition-free public university system make the country the first choice for many students."*

Motivations for attracting international students include demographic factors such as an aging population; the desire to retain a strong science and research enterprise for which Germany is known; and the multiplier economic impact of foreign

students that outweighs a highly subsidized higher education. One pool of students drawn to Germany in increasing numbers are Indian students whose numbers in Germany grew by 13 percent between 2017 and 2018, making Indian students the second largest group of students in Germany after Chinese students (Federal Statistical Office of Germany, 2018). This probably reflects the positive outcome of a policy focus on attracting Indian students; it is also the combined effect of more liberal skilled immigration policies as well as degrees being taught entirely in English — a very attractive feature for Indian students. Also, many Indian students are likely drawn to the strong tradition of science and engineering in Germany's institutions: 82 percent of Indian students are enrolled in engineering, mathematics, and the natural sciences in Germany.

Current target

In 2013 Germany set a target of attracting 350,000 international students (at all levels of education) by 2020; this target was exceeded in 2017. No new target has been set. Instead, the current focus is on ensuring both quality and quantity and tackling issues such as drop-out rates amongst international students (Hillmann, quoted in Redden, 2018).



Note: International student enrollments reflect the academic term ending that year (i.e. 2007 = 2006/07 academic year)
Source: Project Atlas® and DAAD; totals represent both "Bildungsinlaender" and "Bildungsauslaender" foreign students

Figure 12: GERMANY TEN-YEAR INTERNATIONAL INBOUND STUDENT TREND AND KEY POLICIES, 2007 - 2017

Strategies

Germany's efforts to attract international students have been undergirded by three clear strategies: a no-tuition policy for international students; enhanced post-study opportunities, and the increased provision of courses and even entire degrees taught in English (ICEF, 2018).

In 2013, Germany's political parties signed a coalition agreement that included a focus on increasing by 2020 the numbers of international students to 350,000 and to also increase outbound mobility. The agreement drew upon the German Academic Exchange Service or **DAAD's 2020 Strategy**, also launched in the same year, and that focused on improving in-bound and out-bound mobility among German institutions. The DAAD plays a central role in higher education internationalization in Germany. It is a registered association and its members are German institutions of higher education and student bodies. Its budget is derived mainly from the federal funding for various ministries, primarily the German Federal Foreign Office (AA), the Federal Ministry of Education and Research (BMBF), and the Federal Ministry for Economic Cooperation and Development

(BMZ). Support is also received from the European Union, as well from a number of enterprises, organizations, and foreign governments.

The three pillars of the DAAD 2020 strategy aimed at retaining Germany's appeal as a destination include:

- **Scholarships for the Best:** *“Awarding scholarships to the best German and international students and researchers who, in a demanding application process, demonstrate exceptional ability and willingness to accept responsibility” (DAAD, 2013, p. 20).* Most scholarships are for master's or doctoral candidates, including one-year master's programs taught in English; the latter has grown significantly in the past several years, offering an attractive and viable option for international students who might otherwise go to an Anglophone destination (Brenn-White and Faethe, 2013). Aligned with such efforts is the explicit intent to develop alumni networks of scholarship recipients.



- **Structures of Internationality:** *“Creating higher education structures in Germany and abroad (e.g. international degree programs, bilaterally founded universities, academic networks, etc.) which promote international qualification, mobility and dialogue which, in turn, improves the quality of research and instruction” (DAAD, 2013 p. 20).* A key aspect of this part of the strategy as it relates to international students includes an increased focus on improving their academic success rates to be on par with those of German students, as well as better integrating international students.
- **Expertise for Academic Collaborations:** *“Systematizing, developing and providing expertise in educational cultures and systems of higher learning, which the DAAD has gained through its work and network and which is essential for developing internationally successful collaborations” (DAAD, 2013, p. 20).*

In 2012, Germany introduced the “blue card”, modeled after the U.S. “green card”, which allows international students and others a clear pathway to remaining in the country permanently. The rules around employment while being a student have been loosened, as have those permitting international students to work after they complete their studies: international graduates from non-EU countries have 18 months to find employment in Germany. A large number take advantage of this policy (Open Doors, 2017). Moreover, those with a university degree who have secured a job at a certain salary level may remain in Germany for up to four years, with scientists and engineers permitted to remain longer. According to the DAAD, half of the foreign students who earn a degree

in Germany choose to stay, and an estimated 40 percent plan to remain for at least ten years (Nafie, 2017).

This chapter examined the national-level strategies of six countries in recruiting international students. By most definitions and classifications, these countries have been considered long-standing hosts of international students, yet they face increasing competition from emerging, “non-traditional” destinations such as the ones discussed in the next chapter. A common feature among most of the established host countries—the U.S., the U.K., Canada, and Australia, in particular—is that international students have pursued the pathway to skilled migration, thus contributing significantly to the workforce and economies of these countries. Hence, many of the policies currently in place have encouraged this type of migration, while also hindering it when the value of such migration has become embedded within broader national-level debates related to immigration, the allocation of domestic resources, and concerns about the potential displacement of domestic workers. For this group of countries, then, with their long and intertwined relationship between student flows and the development of knowledge economies, there is much to consider as their current and future policies attempt to balance global competitiveness with local needs.

CHAPTER THREE

CURRENT POLICIES AND
TARGETS: CASE STUDIES OF
EMERGING DESTINATIONS

This chapter examines the national-level recruitment strategies of what might be considered emerging destinations. Many of these happen to be non-Anglophone countries that now offer competitive options for international students, especially those from the developing world, through lower costs and increasing quality of education. Some, such as China and Malaysia, offer a viable and more proximate option for students in Asia.

3.1 China

Mobility snapshot

China has been a remarkable success story when it comes to increased international student recruitment. It now has the distinction of being both the world's largest "supplier" of international students, while also being one of the top hosts of in-bound international students. The number of these students in China grew by almost 11 percent between 2017 and 2018, making it the third top host of international students globally (Project Atlas, 2018).³³ Despite this growth, international students make up just one percent of total higher education enrollment in China. China has established itself as an important regional host: with the exception of a sizeable number of students from the U.S., most international students in China come from South Korea,

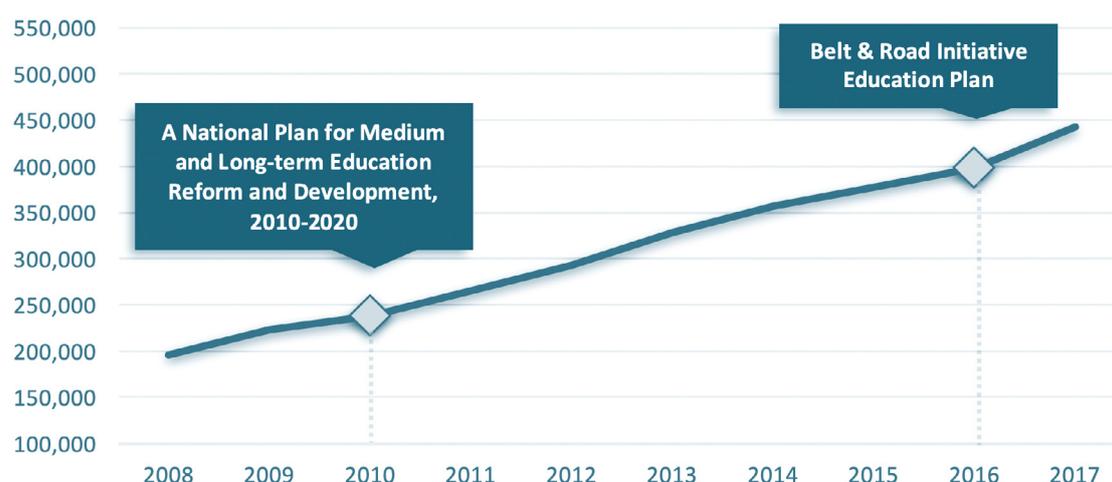
Thailand, Pakistan, and India. Overall, students from the region make up over 19 percent of all international students in China (Project Atlas, 2018). In recent years, China has seen a sharp growth in Indian students for medical studies and amongst African students.

Target

In 2012, China announced a target of hosting 500,000 international students at all academic levels by 2020.

Current strategies

China has been deliberate and strategic about internationalizing its entire higher education sector and in positioning itself as a global player. *"From the late 1970s, the internationalization of higher education in China has been motivated by a desire to realize 'the four modernizations' (of industry, agriculture, defense, science, and technology), through implementation of economic reform" (Yang, 2014, p.151).*



Source: Project Atlas®

Figure 13: CHINA TEN-YEAR INTERNATIONAL INBOUND STUDENT TREND AND KEY POLICIES, 2008 - 2017

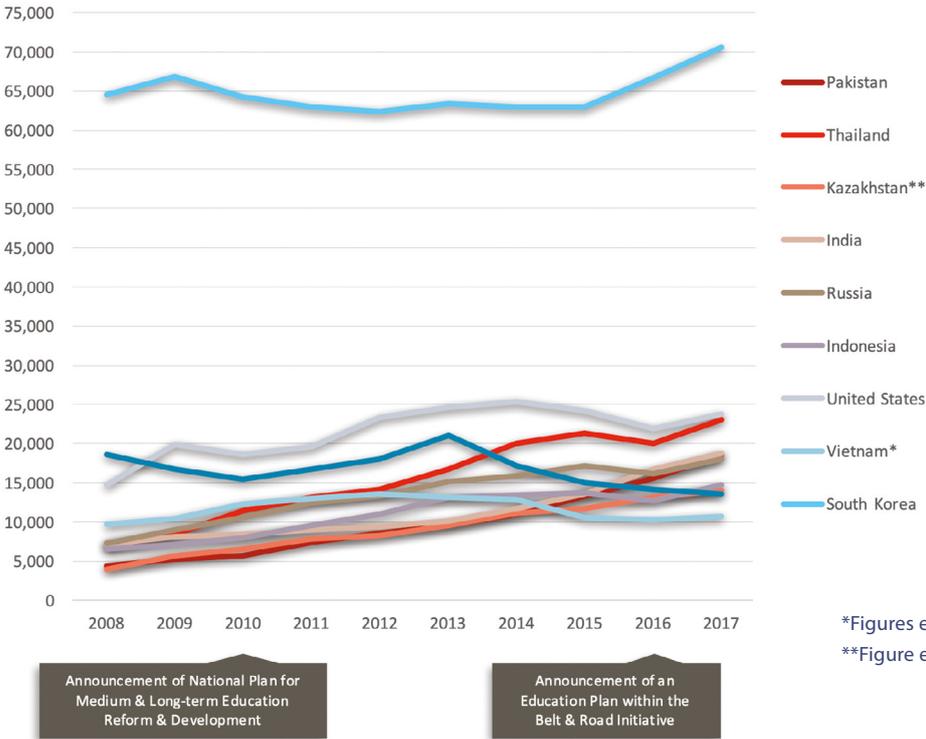
³³Note: the estimates of the numbers of international students in China as well as China's ranking as a host vary based on the source of the data and differences in definitions and methodology. Project Atlas data is provided by the Chinese Ministry of Education and therefore is not comparable to UNESCO data.

China's comprehensive approach earned it a rating of 4.5 out of five on the British Council's Global Gauge of Higher Education Policy, that assesses countries' efforts to attract international students. The measure is based on indicators such as visa procedures for international students; the living and working environment for international students; foreign degree recognition; and scholarships and financial support for international students. Further, the efforts to attract international students have been supported by broader efforts to send more Chinese students and faculty abroad; integrate an international element into curricula and pedagogy; and expand transnational arrangements between Chinese institutions and their foreign counterparts (Yang, 2014). These overall efforts to upgrade the higher education system have included significant investments to improve the overall quality of Chinese institutions to be "world-class", and to expand STEM-related offerings, all of which have culminated in increasing the appeal of China for international students (Schulmann & Ye, 2017).

China's efforts to attract international students have also focused on students from countries with which it shares regional and historical associations. Launched in 2013, the Chinese government's **Belt and Road Initiative** (BRI) spans 64 countries along the so-called "Silk Road" and is intended to foster trade, economic, and educational ties. While originally intended to strengthen infrastructure and trade, BRI has been an effective vehicle for furthering educational exchanges and soft power, with close to half of all international students in China now coming from these countries (ICEF, 2017).

The Chinese government's latest **National Plan for Medium and Long-term Education Reform and Development for 2010–2020** was released in 2010 by the Ministry of Education. Chapter 7 of the plan focuses on the broader goal of improving the overall quality of the higher education sector, while Chapter 16 of the Plan identifies a roadmap for "further opening China's education" through

Inbound students to China by top sending countries, 2008-2017



*Figures estimated for 2015 and 2016
 **Figure estimated for 2008

Source: Project Atlas 2018

Figure 14: INBOUND STUDENTS TO CHINA BY TOP SENDING COUNTRIES, 2008 – 2017

promoting international exchanges and cooperation; introducing quality education resources abroad; and upgrading exchanges and cooperation.

Amongst the wide array of activities that fall under these three pillars, a few specific ones are worth noting, including the expansion of scholarships, particularly for students from the developing world. Most of these scholarships have been provided under the aegis of the China Scholarship Council (CSC), a nonprofit organization established under the Chinese Ministry of Education, which offers scholarships to promote the mobility of in-bound international students in China as well as the out-bound mobility of Chinese students. According to the most current information from CSC, 274 Chinese institutions are offering scholarships for international students each year, and there are also scholarships for language study and medical programs. The expansion of medical programs being taught in English is a strategy worth noting, as this seems to be a draw for international students from countries like India. Indeed, China has ensured that Chinese medical institutions are recognized by the Medical Council of India, enhancing their attractiveness to students from India (Lavakare, 2018).

Scholarships have also been a key strategy of China's to attract those students from developing countries who have greater financial need and who would find it more affordable to study in China as compared with expensive Western destinations. These supports might explain the huge rise in the number of African students now studying in China: according to the Chinese Ministry of Education, the number of African students in China grew from 2,757 to almost 50,000 over a ten-year period, i.e. 2005-2015 (cited in Gu, 2017).

Finally, China's approach to attracting students is rounded out by more liberal visa policies as well as the provision of work and internship opportunities. *“These efforts include relaxing rules on obtaining permanent residency in some major cities, a pilot program to replace annual work permit renewals with a five-year permit, allowing foreign students to participate in short term internships, and students in Beijing to take part time jobs or create high tech startups”* (Schulmann & Ye, 2017).



3.2 Japan

Mobility snapshot

Japan has been a long-standing host of students within Asia, especially students from China and South Korea. Students from within the region make up 56 percent of all international students in Japan (Project Atlas, 2017).

While Japan set ambitious enrollment targets back in 2008, subsequent international enrollment flagged due to natural disasters; the Fukushima nuclear disaster; as well as funding cuts to Global 30, an initiative specifically designed to recruit international students to Japan's top 30 universities. However, beginning in 2014 Japan has seen strong annual growth in the numbers of international students it receives, with large recent flows from Vietnam, South Asian countries such as Nepal and Sri Lanka, as well as Bangladeshi students in Japanese language programs (ICEF, 2018). Japan hosted 188,384 international students in 2018, a ten percent increase over the prior year; these students make up five percent of total higher education enrollment in Japan (Project Atlas 2018; JASSO, 2018). International students at all levels (including postsecondary) increased to 298,980, a 12 percent increase, suggesting that Japan is very close to meeting its target of attracting a total of 300,000 international students by 2020. However, it has been argued

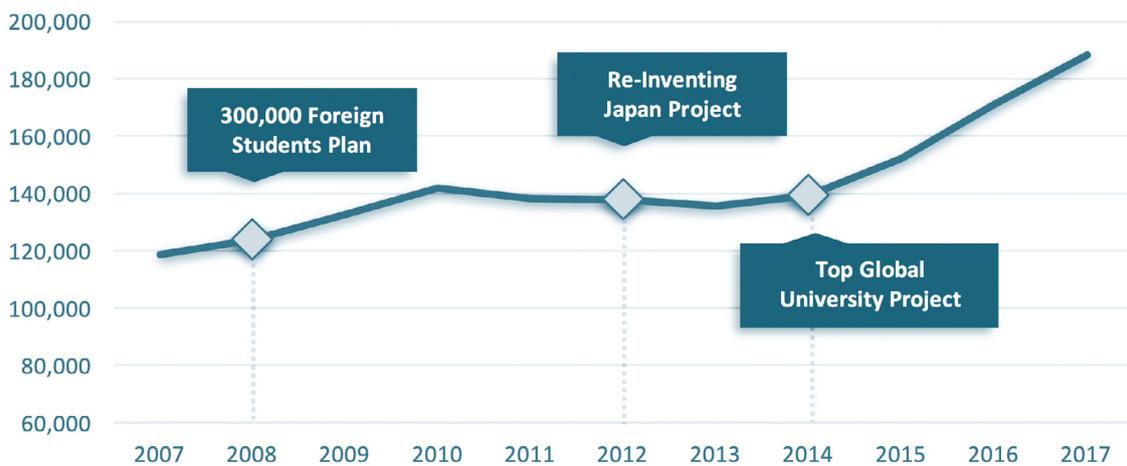
that this overall growth masks the fact that there hasn't been enough diversification among international students and the sending countries; most of the growth is in the number of Chinese students coming to Japan. Further, most growth has been in language schools, rather than at the post-secondary level, as originally envisioned (Sawa, 2019).

Targets

In 2008, Japan set a target to host 300,000 by 2020. An additional target includes raising the employment rate for its international graduates to 50 percent by 2020.

Strategies

Japan has had an *“astute understanding that international students put employability high on their list of goals when they decide where to study”* (ICEF, 2018). This realization has resulted in government policies designed to encourage internships, enhance opportunities for post-study employment, and streamline employment visas. Additionally, as in the case of China, Japan's efforts to attract international students have been accompanied by broader strategies for making Japanese institutions more international and thus more globally competitive and attractive for both foreign students and faculty.



Note: International student enrollments reflect the number present as of May 1 that year
Source: Project Atlas®

Figure 15: JAPAN TEN-YEAR INTERNATIONAL INBOUND STUDENT TREND AND KEY POLICIES, 2007 - 2017

Launched in 2014 by Japan's Ministry of Education, Culture, Sports, Science, and Technology (MEXT) and extending until 2024, the [Top Global University Project](#) (TGUP) is a funding project that aims to enhance the international competitiveness of higher education in Japan (MEXT, 2019). TGUP prioritizes and supports 37 Japanese universities' comprehensive internationalization efforts, including new efforts to build and accelerate partnerships and exchange programs with leading world-wide universities; reform personnel and administrative systems; and strengthen systems to cultivate the ability of students to deal with globalization (MEXT). These universities are regarded as "Top Type" or "Type B" institutions and have adopted a range of internationalization targets that focus on increasing the ratio of international students and international faculty; Japanese students going abroad; classes in foreign languages; and the number of courses taught in English. There is also a move towards using external tests such as the TOEFL in entrance examinations. The initiative has received significant financial investment by the government with a budget of ¥6.3 billion (US\$57.5 million) in 2017, and ¥7 billion (US\$64 million) in the prior year.

Other internationalization strategies in Japan that preceded TGUP but also focused on attracting international students included the [Global 30 Project](#) that was in place between 2009 and 2014. The 13 institutions selected implemented a variety of approaches, including developing degree programs conducted in English and expanding support for international students. A third initiative launched in 2011 and called the [Re-inventing Japan Project](#) focuses on building bilateral relationships between Japan and other countries with the goal of increasing student flows between Japan and each partner country. This project has included a focus on the U.S. which has seen a steady decline in the number of Japanese students studying there (Rose & McKinley, 2018). Other countries and regions of focus have included South Korea, the ASEAN countries, Latin America, the Caribbean countries, and Turkey.

3.3 Netherlands

Mobility snapshot

The Netherlands has seen strong and consistent growth in the number of in-bound international students both from within Europe and from non-European countries, with international students growing by 332 percent over the past 12 years (Jenkins, Skinner & Trines, 2018). In 2018-2019, 85,955 international students studied in the Netherlands, with the majority pursuing full-degree study (NUFFIC, 2019). International students now constitute 12 percent of higher education enrollment in the Netherlands and come from an increasingly diverse range of countries. This is due in large part to the wide availability of courses and entire programs taught in English—the largest number of any European country (outside the U.K.), with 28 percent of all bachelor's programs and 76 percent of master's programs taught exclusively in English in 2018 (NUFFIC, 2019). International students are considered *"a net positive for the Netherlands knowledge economy and state finance"* (NUFFIC, 2018, p. 10) and it is estimated that they contribute at least €1.57 billion (US\$1.8 billion) annually to the Dutch economy.

Target

The Netherlands does not have a formal target for attracting a specific number of international students.

Strategies

The Netherlands introduced a new international education strategy in 2014 aimed at increasing both inbound and outbound mobility, including a focus on transnational education and institutional partnerships. The same year, the government also announced a scholarship scheme that would enable 768 international students to receive scholarships of €5,000 (US\$5,585) each, while the same number of Dutch students would also receive scholarships to study abroad.

The "Make it in the Netherlands" plan developed by NUFFIC in partnership with research universities, universities of applied sciences, municipalities and businesses was also launched in 2014 and included a focus on expanding Dutch language training, career resources for international students and improving employment options as well. However, the plan ended in 2016 with no current indications of a new initiative despite high demand for one within the higher education sector (NUFFIC, 2018).

One approach of the Netherlands has been to set up Netherlands Education Support Offices (NESO) in 11 non-European countries: China, Indonesia, India, Russia, Turkey, South Korea, Vietnam, Mexico, Brazil, Taiwan, and South Africa, with the goal of strengthening the Dutch education brand. These efforts appear to have paid off; some of the largest gains in international student enrollment in the Netherlands have been from countries in which NESO were established. However, in 2015 three of the NESO were shut down in Thailand, Taiwan, and Vietnam due to budget cuts.

Liberal post-study opportunities and skilled immigration policies have driven a lot of the growth of international students in the Netherlands. This has been largely a win-win situation for the Netherlands by helping offset the country's declining population, meeting its needs for more STEM knowledge and talent, and supporting an overall goal to build a knowledge economy (Jenkins et al., 2018). However, the growing presence of international students has also caused tension around over-saturation; Dutch students often feel crowded out by international students. Such issues are not unique to the Netherlands, having arisen in other countries covered in this report.



3.4 Ireland

Mobility snapshot

There has been a clear commitment on the part of the Irish government to establish Ireland as a study destination over the past twenty years, as evidenced in its international education strategies. In 2000-2001 there were 4,184 international students attending Irish universities; by 2017-18 this number had increased to 16,701, with most students coming from Asia (35 percent), the U.S. (34 percent), and other countries within the European Union (Higher Education Authority –HEA, 2018). A new report released in April, 2019 found that international students attending Irish institutions contributed an estimated €386 million (US\$431 million) to Ireland's economy in 2017-2018 (Indecon International Economic Consultants, 2019).

International students are drawn to Ireland due to its location within Europe; its position as an Anglophone country; affordable tuition costs; its reputation as a safe and friendly destination; and the ease of application. These factors will play a dominant role in sustaining the appeal of Ireland post-Brexit, as it will continue to have strong ties to other European countries and will benefit from ease of travel and mobility across countries, which might not be the case for the U.K.

Current target

Ireland targets an increase in international enrollment in higher education of 33 percent by 2019-2020; and increased enrollment in English-language teaching programs by 25 percent by 2020. The overall international education sector (including all levels of education) in Ireland is worth €1.58 billion (US\$1.8 billion) per year, and the goal is to increase this to €2.1 billion (US\$2.3 billion) by 2020.

Current strategies

Developed by the Ministry of Education and Skills in partnership with the High-Level Group on International Education, Ireland's most recent strategy, [Irish Educated, Globally Connected: An International Education Strategy 2016-2020](#) was launched in 2016. This was preceded by Investing in Global Relationships: Ireland's International Education Strategy, 2010-2015, launched in 2010. The current strategy was designed and launched after an extensive consultative process that included several stakeholder groups, including international students; relevant government agencies; and several Irish organizations and institutions. Key Irish agencies engaged in this process include Enterprise Ireland, which manages the Education in Ireland national brand under the authority of the Department for Education and Skills and in association with the Department of Business, Enterprise, and Innovation (Education in Ireland, 2019).

The key pillars of the new international education strategy include (1) the alignment of international education with a broader approach that links it to the National Skills Strategy 2025, the Foreign Languages Strategy, the Trade, Tourism and Investment Strategy and labor market strategies; (2) a focus on institutional quality and internationally-oriented, globally competitive higher education institutions that build long-term relationships with students and partners; (3) stronger growth in English language training (ELT) through specialized programs and approaches such as internships and teaching training; and, (4) strengthening relationships with other countries and their governments through diplomatic efforts, long-term partnerships, and stronger marketing of the Education in Ireland brand overseas (Department of Education and Skills, 2016). Regionally, marketing campaigns are expected to focus on China, the United States, India, Malaysia, Brazil, and the Arabian Gulf.



Source: UNESCO Institute for Statistics

Figure 16: IRELAND TEN-YEAR INTERNATIONAL INBOUND STUDENT TREND AND KEY POLICIES, 2005 – 2016

This overarching strategy has also been supported by efforts to expand post-study opportunities for international students, and to ease visa, immigration and skilled immigration, including a focus on student protection, compliance, and preventing immigration abuse in the ELT sector which is typically more vulnerable to fraudulent practices than other higher education sectors.

The International Education Mark (IEM) will be established under new legislation for the Quality and Qualifications Ireland (QQI). This will authorize the designation of providers that meet particular quality standards. This includes having statutory Quality Assurance (QA) arrangements; arrangements for access, transfer, and progression; programs in alignment with the National Framework for Qualifications (NFQ); and being compliant with the Code of Practice for Provision of Programs of Education and Training to International Learners (QQI, 2019).

Despite these clearly articulated strategies, Irish institutions faced significant funding shortages due to the 2008 global financial crisis; this led to significant cuts in state funding for the higher education sector between 2008 and 2015 (Clarke, Hui Yang, Harmon, 2018; Harkin & Hazelkorn, 2015). These financial

challenges placed an additional burden on institutions also charged with raising their international student numbers while remaining globally competitive as envisioned under the Higher Education System Performance Framework first established for the period 2014-16 (Higher Education Authority, 2017).

Another area of concern highlighted in a recent study commissioned by HEA, Ireland's statutory planning and policy development body for higher education and research, is that Irish institutions perceive a lack of coordination at the national level and amongst various government agencies in fully and effectively promoting Ireland as a destination for international students (Clark et al., 2018).

Since 2015, public and private funding has increased in line with improvements in the Irish economy, especially for capital projects. There has been a noticeable expansion in the number of major campus developments across the entire university sector. The newly designated Technological University Dublin will be head-quartered at a major new campus at Grangegorman in Dublin.¹⁴ At the same time, there has been considerable growth in the number and quality of student accommodation, particularly targeting international students (Rebuilding Ireland, 2019).

Despite recent challenges, Ireland is now one of the fastest growing economies in the EU and with a population growth rate five-times the EU average. This is attracting U.S. tech companies and U.K. financial businesses keen to operate within the EU (Wright, Benson & Hamre, 2019). Another big change has been the transformation to a multicultural society with people from over 200 different nations now living in Ireland. Alongside expectations that student domestic demand for higher education will continue to rise up to 2029, the number of international students going to Ireland is also expected to continue to grow and diversify.

Following Brexit, Ireland will be the largest English-speaking country in the EU; the other is Malta. These developments are making Ireland an attractive place, especially for international students seeking an English-speaking destination.

3.5 Other emerging destinations

Several other countries have recently declared their ambitions and plans to host an increasing number of international students, but these efforts are in the early stages and it's too soon to attempt any firm conclusions about whether they are yielding results. New Zealand, India, and Malaysia are three such countries whose efforts are briefly discussed below.

New Zealand's internationalization strategy 2018–2030, released in August 2018 and led by Education New Zealand and the Ministry of Education, replaces the earlier 2011 Leadership Statement for International Education. The new strategy has three areas of focus: delivering excellent education to international students and improving their experience; sustainable growth; and developing global citizens (New Zealand Government, 2018). Accompanying efforts to raise overall quality include expanded training for agents to ensure the quality of services they provide international students.

Post-study work opportunities have been expanded, with postsecondary-level students able to receive three-year "open work" visas that do not bind them to a particular employer. These efforts, along with New Zealand's practice of offering subsidized tuition to international doctoral students and providing an open work visa for their partners, as well as free education for their dependents, provides international students with advanced levels of study a clear pathway to permanent residence in New Zealand. Underlying the overall strategy is also the intent to broaden the cultural and economic value of international students by integrating them into other regions of New Zealand as opposed to just

¹⁴<https://www.dit.ie/grangegorman/>

Auckland or other major urban areas.

While New Zealand's new approach does not set numerical targets for increasing international enrollments, it does set clear goals and indicators for measuring progress towards each goal. But there is a target to raise the economic value of New Zealand higher education to NZD\$6 billion (US\$3.9 billion), through a combination of attracting international students to New Zealand as well as education provision overseas by offshore arrangements. In 2017, international education contributed approximately NZD\$4.4 billion (US\$2.8 billion) to the New Zealand economy, enrolled 125,390 international students (at all levels of education), and supported 33,000 jobs (New Zealand Government, 2018). However, the same year New Zealand also experienced declining international enrollments in its vocational and technical education sector (or PTE) primarily due to a sharp drop in enrollment from India and the Philippines. At the same time, international enrollments in the public higher education sector grew by seven percent to reach 28,821 students at all levels of post-graduate study and with an estimated value of NZD\$1.28 billion (US\$838.6 million).

Malaysia is regarded as one of the six major education hubs in the world, host to seven branch campuses of foreign institutions established in the past decade (Knight, 2018). Although it has a clearly articulated internationalization strategy, its approach to attract international students is primarily based on branch campuses, while also raising the position of Malaysian universities in global rankings. In recent years Malaysia's branch campuses have proved very popular with students from neighboring countries and particularly amongst students from Muslim-majority countries (Aziz & Abdullah, 2014). The rise of Malaysian branch campuses as a destination comes within an overall strong growth in higher education enrollment in recent years coupled with a large investment in expanding higher education—close to eight percent of the Malaysian Government's budget

is allocated to higher education, a much higher proportion than that of neighboring Asian countries (ICEF, 2015). Following an extensive review process that began in 2011, the Malaysian Ministry of Education released its new National [Education Blueprint, 2013-2025 in 2013](#) (Ministry of Education Malaysia, 2013). In addition to raising overall academic quality, the blueprint aims to increase international enrollment in Malaysia to 250,000 by 2025.

Although **India** has not been a major global destination at par with other countries, its affordable English-medium postsecondary system has always been a magnet for students from across South Asia, as well as from developing countries in Central Asia and Africa. Even so, given that it has the world's third largest higher education system, India hosted only about 46,144 international students in 2017-18 (AISHE, 2017/18), with international students making up just 0.1 percent of all higher education enrollment in the country (UNESCO, 2018). Multiple efforts over the years to attract international students have been met with mixed success owing to the variable quality of Indian institutions with few considered world-class (Lavakare, 2018).

Nonetheless, in a renewed effort in April 2018 the Indian government announced an ambitious plan—Study in India—to attract 200,000 international students by 2023, relying initially on reliable markets in neighboring countries in Asia, in the Middle East, and subsequently expanding outreach elsewhere (EdCIL, 2018). The initiative is managed by EdCIL (Educational Consultants of India), under the Ministry of Human Resource Development (MHRD). Specific strategies under the initiative include an easier visa process; complete or partial fee waivers and scholarships in the form of 15,000 seats at 160 institutions, including 60 institutions with ratings in the top 100 of India's National Institutional Ranking Framework (NIRF). It is too early to tell whether international students will avail themselves of these opportunities, but a pilot program has been launched to test the

initiative (Yeravdekar & de Wit, 2018). Meanwhile, some have questioned India's focus on recruiting foreign students when the country is not able to meet the educational needs and enrollment demands of its domestic students (Teri, 2018).

Spain, and the United Arab Emirates (UAE).

This chapter presented case studies of countries that might be regarded as emerging or smaller host destinations of international students. It is important to note that some have had in place internationalization efforts that date back several years (for example, Japan and Netherlands), yet their international student numbers are modest, and/or their governments have shown renewed vigor in establishing new strategies to attract global talent. Yet others—like New Zealand and Malaysia—are newer players in the global area of international student flows, bringing to the field a new perspective and innovative approaches to attracting students. Finally, while it was not possible to include every single host country in this report, there are several others that play a significant role as hosts of regionally and globally mobile students, including Israel, Mexico, Poland, Russia, South Africa,

CHAPTER FOUR

FUTURE PROSPECTS AND
EMERGING TRENDS

Having explored the specific recruitment approaches of several established and emerging host destinations, this final chapter focuses on the wider landscape of socio-political developments that have implications for student flows, while also exploring avenues for future growth. It concludes with some key takeaways from the analysis of countries' efforts that can also offer useful guidance for countries embarking on their student recruitment strategies.

4.1 A World in Flux

An altered political climate and the future of mobility

One of the most significant developments over the past few years has been the rise of nationalism around the world, and what is perceived as an anti-immigrant sentiment and a turning inward of many host destinations that have typically attracted large numbers of students and scholars from around the world. The first such development was the Brexit referendum in the U.K. in 2016; Britain's withdrawal from the European Union will likely have far-reaching consequences on student mobility into and out of the U.K., and on mobility between the U.K. and continental Europe. Political shifts in the United States and proposed policies restricting post-study work and subsequent skilled immigration have also raised doubts about the United States as an attractive destination for international students. While drawing precise conclusions will require time and new sets of enrollment data before we can see with clarity just how student flows are responding to international political changes, a sharp uptick in the international enrollments of other competing Anglophone countries suggests that some of these factors might already be affecting student decision-making.

Another recent development is the surge of refugees and forced migrants around the world, particularly from the Middle East. Academic displacement has ensued, and this has implications not only for the higher education sectors of the home countries that have been decimated but also the higher education sectors of countries that receive displaced students. Displaced students face many roadblocks in accessing higher education (UNHCR, 2016). While such students fall outside the profile of what is typically considered an international student, their circumstances require special attention from the higher education community. As displaced students seek entry to higher education institutions outside their home countries, issues of transferability of academic credentials, language preparation, integration and support on campus, and preparation to enter labor markets following graduation will become significant issues for higher education institutions around the world (Watenpaugh, Fricke & King, 2014).

4.2 Future Projections

Given the growth in the number of globally mobile students over the past several years, and the accompanying rise of countries that want to host them, it is important to consider questions of future demand and supply: Which students want a global education experience, and which countries are best positioned to provide it? In an attempt to offer an answer, the field has been rife with various projections, including speculation that Germany could soon overtake the U.K. as the top host destination in Europe (Custer, 2016). Another suggests that by 2020 China will overtake the U.K. as the host country to the second largest number of international students (student.com, 2016); yet another projection suggests that Australia will overtake the U.K. (Marginson, 2018). Sophisticated demographic and econometric models would be needed to take account of many factors and to predict with statistical certainty the future of international student flows. Even when such predictions have been attempted in the past they have fallen short because they failed to anticipate the rising star of China—and Asia at large—as a solid higher education contender, in competition with western nations and the global North. The accuracy of projections notwithstanding, this section attempts to lay out some considerations that will affect future developments in global student mobility.

Is there a capacity to sustain international student growth?

The extraordinary recent growth in international enrollments in countries like Canada and Australia raises an important question: Can countries with small higher education sectors sustain high growth rates? For example, the U.S. has 4,540 institutions (including community colleges), yet international students make up just 5.5 percent of total higher education enrollment (although they are represented in higher proportions at the graduate level). On the other hand, Canada has only 280 institutions (including vocational educational institutions), yet international students make up 18 percent of the total student body and their numbers have also grown exponentially in recent years. Australia has 136 institutions; China has 3,623; Australia, 124; and Germany has 426.



Australia, the U.K., Canada, and New Zealand host the largest shares of international students in comparison to their total higher education populations.

Source: Project Atlas 2018

Figure 17: INTERNATIONAL STUDENTS AS A PERCENTAGE OF TOTAL HIGHER EDUCATION ENROLLMENT, 2018

A related question is whether and how countries are managing the sharp growth of international students and what problems if any, this expanded population of international students presents? A rapidly growing international student population can present challenges both for institutions that need to provide the necessary supports and services, as well as for local communities with limited resources to absorb this growth. Urban areas may struggle with over-population or congestion, while rural or remote areas may grapple with adjusting to a large concentration of foreign residents (Usher, 2018).

From a strategic perspective, then, this suggests that growth that is planned and managed can enable countries, their regions and their institutions to fully leverage the presence of international students. Strategic approaches can also ensure that recruitment efforts are aligned with domestic educational needs and capacity, and that the higher education sector—and the economy more broadly—is diversified and not over-reliant on international students as a revenue stream or dependent on any one group of students (as has been observed in the U.S. with the recent spike and subsequent decline of Saudi and Brazilian students). This also raises the important issue of quantity vs. quality, with countries such as New Zealand focusing in a more intentional way of improving the quality of the international student experience rather than solely pursuing larger international student enrollments.

The role of demographics: Growing and waning populations

Demographic shifts are also relevant in determining where the world's global talent will come from, and which countries face declining populations and a potential "talent deficit" due to factors such as an aging population; rising life expectancy; lower birth rates; and declining higher education cohorts—all of which result in a greater reliance on drawing talent from potential source countries. For example, Canada's liberal immigration policy is designed to address labor shortages as well as compensate for an aging population and to ultimately expand Canada's population to 51 million by 2063 to ensure sustained economic growth (Statistics Canada, 2018).



¹⁵The credit of coining the now popular term goes to Indian Member of Parliament, Jairam Ramesh.

Similarly, in Japan, South Korea, and Taiwan demographic shifts have spurred new initiatives to attract mobile student populations from abroad. In South Korea, declining birthrates have reduced the size of the domestic higher education cohort, leading the government to in 2015 set a goal of attracting 200,000 international students by 2023. In Taiwan, it was projected that the declining birthrate would result in a 40 percent drop in higher education enrollments between 2012 and 2028 (Chi-Wei & Hsin-Yin, 2017). In response, the Ministry of Education launched a Talent Development Policy, allocating NT\$430 million (US\$13.6 million) annually over the next three years in financial support for initiatives ranging from student recruitment to overseas internships and branch campuses, as well as exchange agreements. As discussed earlier in this report, Japan aims to raise domestic enrollments by attracting international students both from within Asia and from other regions by offering courses taught in English.

It is estimated that by 2025, higher education enrollment worldwide will double to 262 million and that much of this growth can be attributed to "Chindia"¹⁵—a portmanteau that describes the joint power of China and India, which together are major players in the global student mobility space both as source countries but also as emerging hosts, especially in the case of China. By 2020, China alone will account for almost 30 percent of the world's university graduates between the ages of 25 and 34 or, in absolute numbers, there will be as many Chinese graduates in that age group as the entire U.S. population aged 25 to 64 (OECD, 2012). India, Asia's third largest economy, will add up to 300 million people to its workforce over the next two decades—the equivalent of the entire U.S. population. All of India's growth will be amongst its youth population, a "demographic dividend" whose educational needs cannot be met by Indian institutions alone (although their capacity is growing substantially). Thus, they will continue

to seek an international education in large numbers, whether through traditional mobility to a host country or through other arrangements such as TNE. An interesting additional layer in the relationship between India and China is that an increasing number of Indian students are now seeking out China as a destination, primarily for medical degrees. The Indian student population in China grew from 8,145 in 2008 to 16,694 in 2015 (Lavakare, 2018).

While there has been an inordinate focus on China and India and their growing demand, Africa as a world region has not received sufficient attention in the international recruitment efforts of various countries. This is despite the fact that the proportion of African students who were globally mobile increased by 49 percent between 2006 and 2017, reaching a total of 514,737 students (UNESCO Institute of Statistics, 2017).¹⁶ In terms of future population growth and potential demand for education, Africa has the most people in the world under 18 and is projected to account for half of the world's population growth between 2015 and 2020 (United Nations, 2017). While outbound students from Francophone and Anglophone Africa have traditionally studied in destinations with a strong linguistic, cultural, or historical connection—such as France, the U.S., the U.K., and South Africa—it appears that they are now beginning to explore other destinations such as China, Saudi Arabia, the UAE, and Ukraine (Schulmann & Ye, 2017). What has drawn African students to these unlikely destinations is financial support in the form of scholarships, as well as the religious and cultural affinity between Gulf nations and North African countries such as Egypt, Tunisia, Morocco, and Algeria.

¹⁶The exceptions are China and India, both of which host large numbers of African students, though China many more than India.

Although Africa might seem to be the next frontier for international student recruitment with its large growth potential and pool of global aspirants, it is a part of the world that continues to experience a significant loss of human capital through outbound student mobility. While it is not within the scope of this report to do justice to the complex issue of brain-drain, an examination of international student recruitment policies does raise the issue of what obligations and responsibilities host countries have when it comes to balancing their own needs to fill critical knowledge and skill gaps by attracting global talent, with the needs of developing countries to retain their valuable human capital. This imbalance is addressed to some extent by scholarships in the form of development aid, awarded to students from developing countries by the governments of developed countries and monitored under Target 4.b of the UN Sustainable Development Goals. But according to a recent analysis of globally available scholarship data, the total number of such scholarships is small and serves only one percent of those from the developing world who seek a global education (Bhandari & Mirza, 2016).

International student flows within the larger framework of global competitiveness

Moving beyond student mobility and flows data, a look at broader trends in global competitiveness reveals interesting findings on how some of the countries featured in this report are faring. Since 2014 the IMD World Talent Ranking has assessed the extent to which 63 countries develop, attract, and retain highly-skilled professionals (IMD World Talent Rankings, 2018). The index is based on three factors: *Investment and Development* which measures resources invested in developing domestic human capital; *Appeal*, which assesses the extent to which a country attracts foreign talent while retaining opportunities for its domestic talent; and the *Readiness* factor which quantifies the overall quality of the talent pool available in each country. According to the 2018

rankings, Switzerland topped the list, followed by Denmark and Norway. Canada is the only non-European country in the top ten, and the U.S. ranks twelfth.

According to the rankings, Canada improved its position between 2017 and 2018 due to an increased priority on talent retention; reducing the impact of brain drain on the economy; and strengthening its education system. The U.S. improved its rankings from 16 to 12, owing mostly to small gains in investment and development, and appeal. However, *“there is an increase in negative executive views in terms of the quality of life, the country’s attractiveness for overseas highly skilled staff and the adequate protection of personal security and private property rights”* (IMD World Talent Ranking, 2018, p. 15). The Netherlands ranks fifth, scoring particularly high on readiness indicators because of a strong education system that develops the skills and talents needed for the Dutch economy. Germany ranks tenth, and is a leading talent hub in Europe. Interestingly, the U.K.’s rankings have declined since 2014 and its current rank of 23rd places it below countries such as Australia, Israel, New Zealand, Ireland, and Malaysia. China ranks relatively low (39th) because of challenges around attracting foreign workers and lower levels of investment in education as compared with other advanced nations. This might explain China’s recent efforts to attract global talent, while also providing incentives that would allow some of that talent to remain in China.

Another approach to this is looking at how open countries are to international engagement and talent. As shown in this report, attempts to attract international students are often aligned with broader efforts to develop scientific and innovation capabilities and strengthen knowledge economies. International flows of students and researchers are fundamental to driving these developments. Evidence from Wagner et al. (2018) in their study of networks and international collaborations,

reveals that researchers and scientists do better science when they can partner and collaborate internationally. Scholarly articles produced through international collaborations are of higher quality, as measured by their citations (Wagner, Whetsell, Baas & Jonkers, 2018). Staff who travel and are internationally mobile produce more research and higher impact research, compared to non-mobile staff. These findings have significant implications for countries attempting to attract international students and where a large proportion of the scientific workforce is foreign-born, yet where current or future policies around post-study work and skilled migration might limit the type of mobility that is essential to scientific endeavors. For example, studying the networks and circulation of researchers shows the dominance and centrality of the United States, United Kingdom, France, Canada, and Germany as talent hubs, all countries that have benefited over the years from large in-bound student and talent flows (Sugimoto et al., 2017).

The Openness Index

The Openness Index finds that “... openness among advanced science systems is strongly correlated with impact—the more internationally engaged a nation is in terms of co-authorships and researcher mobility, the higher the impact of scientific work.”

Wagner et al., 2018, p. 1.

4.3 Ten Key Takeaways

This report set out to examine the current status of global student mobility flows, with a focus on what key countries are doing to attract international students and their motivations for doing so. Several broad conclusions and key takeaways emerge from this analysis. Some findings are consistent across countries, others provide insight specifically into what seems to work when it comes to a national-level approach to attracting students.

1. How countries view international students — as either instruments of “soft power” or sources of “global talent” — affects the mix of strategies that are adopted.

Whether students are viewed as global talent, cultural capital or a key export determines the focus of a country's strategies to attract students. Indeed, the report makes clear that policies to recruit international students are often situated within broader national strategies and efforts related to trade, human capital development, and skills development. Even so, the overarching aims of global engagement and talent-building need not be mutually exclusive. For example, in the case of Germany, international students serve the dual goal of providing global talent for a society with a declining population but also are viewed as bringing important cultural contributions that help retain the international environment of Germany's institutions and uphold its commitment to educational and cultural exchange.

2. For international student recruitment efforts to succeed, they need to be part of a comprehensive and holistic approach to internationalization

that includes efforts to send domestic students overseas; to internationalize at home; and to build university linkages and partnerships that result in an overall ecosystem and national environment that is global and ultimately attractive to talent from around the world. Countries that are attempting this include Ireland, Australia, and Japan, where efforts to increase international student enrollment have been matched by efforts focused on outbound mobility and wider reforms in the higher education sector. Further, a comprehensive approach needs to engage the entire higher education sector, all relevant government agencies,

and the international education nonprofit sector (as in the case of the U.S. where this sector plays a key role in attracting international students). Where international recruitment strategies have succeeded, multiple government agencies have been engaged in the process, recognizing that attracting international students has multiplier impacts and implications for diplomacy, cultural exchange and global knowledge; for fostering a global higher education sector; for innovation and entrepreneurship; and for long-term workforce planning and development. Partnership with industry and entrepreneurship are particularly important for the value proposition of international education, and for attracting global talent.

A comprehensive and holistic approach to attracting international students

International education intersects with a range of government portfolios, particularly education, immigration, tourism, trade and foreign affairs. Change in one area can have ramifications for others. Policies, practices and regulation in all areas need to align to support not just international education but Government's broader strategic objectives around wellbeing and a sustainable, productive and inclusive economy.

New Zealand International Education Strategy, 2018, p. 6).

- 3. Skilled immigration policies are paramount in attracting international students.** If countries want to attract the world's best and brightest in the global marketplace of knowledge and ideas, they should also expect that this global talent pool will want the most competitive opportunities in terms of employment and their future. While it is difficult to infer causality, some reasonable conclusions can be drawn from recent developments where post-study work and/or skilled immigration has either been

curtailed significantly (in the case of the U.K.) or where its future is uncertain (as with the U.S.), and where international student enrollment numbers have slowed if not declined. Qualitative surveys have also shown that international students, particularly those from Asian countries such as China and India, are interested in the post-study opportunities that a country offers and that any constriction in such policies would likely give them pause. On the other hand, both Canada and Australia have seen recent gains in their international student numbers due in no small part to an expansion of their post-study opportunities for students.

- 4. Financial assistance, either in the form of reduced tuition or scholarships, is an enduring vehicle for attracting international students.** China, the U.S., the U.K., and Canada have all made scholarships a key component of their outreach to international students. The role of scholarships in enabling global flows is critical at a time when higher education costs worldwide are escalating, and many countries are grappling with issues of increasing higher education access. However, as recent analysis reveals, an estimated one percent or less of the world's globally mobile students from the developing world are currently receiving scholarships or financial support from their host countries in the global North (Bhandari & Mirza, 2016).

Focusing on international student success: Germany

We must increase the academic success rate of international students to at least 75% which is equivalent to that of German students. This will require better counselling and integrative support, to which the DAAD will contribute with its funding programmes and support of good practices. Even before the admissions process, universities have to assess the preparedness and language proficiency of their international applicants.

DAAD Strategy 2020, p. 27.

5. A focus on international students' experiences, perspectives, and outcomes is important.

An interesting finding from the current review is that few countries squarely situate the international student experience at the heart of their recruitment strategies and even fewer actively involve international students in shaping policies that affect them. In this regard, Australia and New Zealand stand out as two countries that have involved international students and student councils in the consultative process when designing their internationalization strategies. Further, both countries have made an explicit commitment to focusing on the quality of, and satisfaction with, the international student experience, while also protecting the rights of international students, as enshrined in Australia's Education Services for Overseas Students Act 2000 (ESOS). Germany has also focused recent efforts on raising the academic success level of its international students. In contrast, while U.S. institutions are renowned for the level of support and services offered to international students, the quality and regulation of such efforts is largely left to individual institutions and is not a part of any national policy.

6. Alumni who were international students in the past may well be the best ambassadors for their host country, yet few countries tap into international alumni networks and this highly effective and low-cost approach to attracting future international students.

Among countries that leverage the power of alumni, the Canadian government references alumni in its policy to attract international students, while Australia has a dedicated Australia Global Alumni Engagement Strategy. The Netherlands has also been very active in this area via its Holland Alumni Network.¹⁷

7. Countries are responding to, and tapping into, new patterns of mobility and relationships such as the increase of regionalization, South-South mobility, and diasporic connections that attract students with a historical or cultural affinity with the host country. These include, for example, Australia, China, and Japan as part of APEC and ASEAN which enables these countries to also capitalize on regional ties, associations and trade agreements, as well as China's growing role in attracting students from the developing world.

8. Attracting international students through alternate modes of delivery is a key tool.

The U.K., Ireland, and Australia have pioneered the delivery of offshore education or Transnational Education (TNE), as well as distance education. On the other hand, India has resisted the establishment of foreign branch campuses out of concern that they would overtake India's own higher education system. Meanwhile, Malaysia has embraced such arrangements and is now home to several branch campuses in the belief that they will attract both domestic and international students. Beyond such arrangements, one aspect that remains largely unexplored is the role of technology in attracting international students. How is technology being integrated into higher education provision both domestically and to facilitate international learning, but also how can it be used to address issues of access? It is not clear what technological advancements mean for traditional student flows, whether such developments will impede mobility as we know it or continue in parallel, complementing the traditional experience but not replacing it. However, if countries turn more insular and limit student flows, then the connectivity of technology might be needed more than ever.

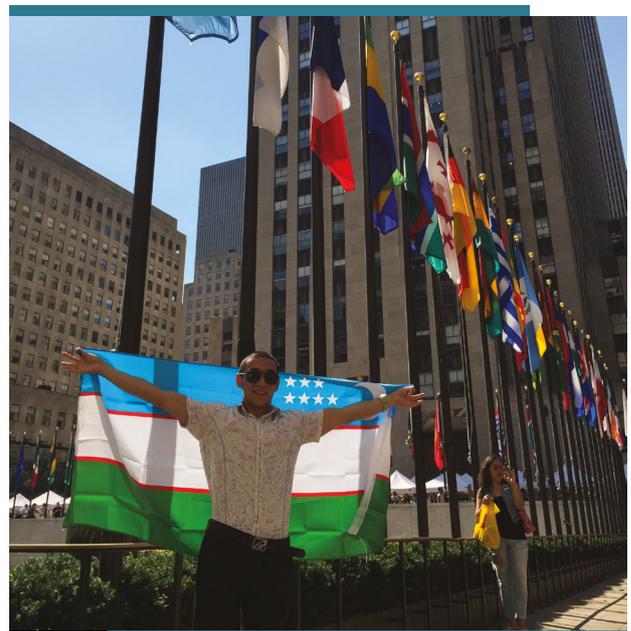
¹⁷ <https://www.hollandalumni.nl/>

9. Many countries are aiming to improve the quality of higher education and to be world-class. However, it is not clear what exactly is meant by the notion of "quality" and how it is operationalized. Does it mean raising the overall quality of the higher education system that receives international students? Does it mean attaining a position in the world rankings? Or does it mean offering international students a high-quality experience? For example, China's policy alludes to "raising quality in an all-around way." Among the policies reviewed for this report, New Zealand and Australia were two countries that have clearly articulated goals around high-quality international student experiences, including a focus on quality assurance.

10. Related to the issue of what constitutes quality is that of a lack of systematic evidence on whether or not countries' recruitment strategies are working. It was not clear from this review whether any of the countries featured had in place an effective system for measuring their performance against established targets and strategies. Beyond a mention in Canada's strategy and benchmarks established for New Zealand's new internationalization strategy, it was challenging to find clear, country-level evaluations or assessments of whether specific interventions and strategies have worked. Even in cases where there was a shift in strategy over time, it was not clear whether there were lessons learned or key takeaways that could inform future policies. This is an area for future research.

In a rapidly evolving landscape of higher education provision and student mobility, these ten takeaways offer some insights into widely adopted strategies that other countries can look to as examples. This report set out to identify and compare the national-level governmental policies and strategies

of both established and emerging countries to recruit international students. However, little rigorous evidence exists on the relative merits of these strategies and their impact on ebbs and flows in student enrollment, and whether the existence or absence of such strategies is correlated with international student growth. Going beyond national-level policies, there is a multitude of push-and-pull factors that affect the wider landscape of international student enrollment. These include, among others, the impact of university tuition and fees as a factor in student choice; students' and families' perceptions of personal safety and feeling welcome; the role of agents in student recruitment; the expanding higher education capacity of prospective international students' home countries; and the impact of broader socio-political developments that either welcome or deter visitors and students from other countries. The role of national policies is just one factor—albeit the most significant one—in the overall complex ecosystem of international student mobility and talent flows.



ABOUT THE AUTHOR

Rajika Bhandari



Rajika Bhandari, Ph.D., provides strategic guidance to the Institute of International Education's (IIE) research, evaluation and thought leadership activities and directs the Center for Academic Mobility Research and Impact through which she leads the flagship *Open Doors* and *Project Atlas* projects on global student mobility. With over 20 years of experience in the nonprofit, private and higher education sectors, Dr. Bhandari serves as a senior spokesperson for IIE on global higher education issues, is a frequent speaker and widely published author, including of six books, and has written for the *Guardian*, *Times Higher Ed*, *the Huff Post*, *the Chronicle of Higher Education*, and *University World News*. Prior to joining IIE, Dr. Bhandari was a Senior Researcher at MPR Associates (now part of RTI International) in Berkeley, California, and an Assistant Director for Evaluation at the University of North Carolina, Chapel Hill. She has been an Adjunct Associate Professor at Teachers College and been a Commissioner on the U.S. National Commission for UNESCO. She is currently on the Board of Advisors for AIFS Study Abroad and on the Board of Trustees of the AIFS Foundation. She holds a B.A. (Honors) in Psychology from the University of Delhi, India, and a Ph.D. in Psychology from North Carolina State University in the U.S.

About the Institute of International Education (IIE)



The Power of International Education

Established in 1919 with the founding premise that international exchange could make the world a more interconnected place, the Institute of International Education has championed international education and pioneered new models of collaboration across institutions of higher education with a worldwide reach. Today, IIE proudly supports flagship educational and cultural exchange programs on behalf of the U.S. Departments of State and Defense, in addition to government, corporate and foundation programs. IIE is proud to assist scholars, students and artists threatened by conflict and unrest in their home countries.

ABOUT WISE



The World Innovation Summit for Education was established by Qatar Foundation in 2009 under the leadership of its Chairperson, Her Highness Sheikha Moza bint Nasser. WISE is an international, multi-sectoral platform for creative, evidence-based thinking, debate, and purposeful action toward building the future of education. Through the biennial summit, collaborative research and a range of on-going programs, WISE is a global reference in new approaches to education.

The WISE Research series, produced in collaboration with experts from around the world, addresses key education issues that are globally relevant and reflect the priorities of the Qatar National Research Strategy. Presenting the latest knowledge, these comprehensive reports examine a range of education challenges faced in diverse contexts around the globe, offering action-oriented recommendations and policy guidance for all education stakeholders. Past WISE Research publications have addressed a wide range of issues including access, quality, financing, teacher training and motivation, school systems leadership, education in conflict areas, entrepreneurship, early-childhood education, twenty-first century skills, design thinking, and apprenticeship, among others.

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