

TRENDS AND ISSUES IN GLOBAL STUDENT MOBILITY: THE EUROPEAN AND DUTCH CONTEXT

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This paper is written in the context of the study on housing for international students in the Metropolitan region of Amsterdam as well as Delft, for the housing corporation DUWO.

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PREFACE

This paper¹ is written in the context of the study on housing for international students in the Metropolitan region of Amsterdam as well as Delft, for the housing corporation DUWO. It provides an overview of trends and issues in global student mobility with a particular emphasis on the European and Dutch context. The overview ends with a summary and main relevant features. It will also address in the concluding section some of the issues relevant to housing of international students.

¹ This paper is based on and updated and adapted from a number of articles written by the author alone or in cooperation with others: De Wit and Choudaha (2014), De Wit, Ferencz and Rumbley (2011), De Wit (2011) and De Wit (2012).



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GLOBAL TRENDS IN STUDENT DEGREE MOBILITY: CONTEXT AND TYPOLOGY

International students have become in the past decades an important social and economic factor for institutions of higher education, governments, cities and also other organizations, including housing corporations.

The pace, directions, and outcomes of international student mobility are significantly influenced by a complex interplay of multiple push and pull variables: mutual understanding (political, social and cultural factors), revenue earning (economic factor), skill migration (economic factor) and capacity building (educational factors). (For an overview of push and pull variables see Agarwal *et al.*, 2008, 241). While some variables hindered mobility many more enabled it to offer a consistent growth in numbers over the decades.

The first decade of the 21st century has seen the number of globally mobile students nearly double from 2.1 m in 2000 to 4.1 m in 2010, growing at an average annual rate of 7.2% (OECD, 2012). *"Europe is the preferred destination for students studying outside their country, with 41% of all international students. North America has 21% of all international students. Nevertheless, the fastest growing regions of destination are Latin America and the Caribbean, Oceania and Asia, mirroring the internationalisation of universities in an increasing set of countries."* (OECD, 2012, 361)

In the last decade, the dominance of the three leading destinations has remained relatively steady (OECD, 2012). In 2000, 39% of globally mobile students were enrolled either in the U.S. (23%), U.K. (11%), or Australia (5%). This aggregate share declined slightly to 37% in 2010, with the U.S. hosting 17%, U.K. 13%, and Australia 7%. The drop in aggregate portion was driven by the U.S.'s loss of 6%, which was redistributed between Australia and the U.K. This means that if the U.S. were to have maintained its claim

of the student mobility market of 23%, it would have needed to have enrolled nearly 250,000 additional students than it did by 2010.

The other two leading nations for a long time have stayed also in the top five: Germany and France, but they differ in several ways from the other two, first of all by their languages, which is not English, the dominant language in education currently; secondly by their tuition fees, which are much lower than in the other three countries, and thirdly – in particular in the case of France – by the background of their students, which is more diverse and more related to their historical ties and cultural and linguistic area of influence.

The U.S.'s market share slid primarily due to a combination of two simultaneous factors: stricter immigration policies in the U.S. after 9/11 that raised entry barriers for international students, and a more welcoming stance adopted by Australia and the U.K. The repercussions of 9/11 were that of tightened entry and monitoring of international students through the Student and Exchange Visitor Information System (SEVIS), which ultimately hurt the U.S.'s image overseas. In 2005/06, international student enrolment in the U.S. hit a new time low post 9/11 of 565,000 – a decrease of 21,500 from 2002/03 figures (Open Doors, 2012).

On the other hand, both Australia and the U.K. lowered barriers for international students by offering an attractive package of lower cost, future immigration potential, and welcoming outreach. Their immigration policies offered easier post-study employment and permanent residency pathways. Moreover, national-level marketing along with aggressive use of commission-based agents made Australian and British universities attract more international students. In contrast, post-education employment became very difficult in the U.S. not only in terms of obtaining work permit but also due to sheer decline in job availability. As a result, within a decade, Australia and the U.K. added nearly 165,000 and 310,000 foreign students, respectively (OECD, 2012).

In other words, the post-9/11 scenario made the U.S. less attractive, but it did not curtail the aspirations of globally mobile students, and hence, the U.S.'s loss in share became the U.K.'s and Australia's gain. Growth of international student enrolment in these latter two countries would have continued if it had not been for the global economic crisis of 2008. The unforeseen ramifications of the financial recession took policy-makers and higher education institutions by surprise. It further exposed two critical issues regarding international student enrolment in Australia and the U.K.: the high proportion of foreign students as compared to domestic students, and concerns related to quality and intentions of some international student due to increasing cases of visa abuse and its relationship with aggressive recruitment practices. Australia and the U.K. stiffened their visa policies in response to these challenges, which in turn sent discouraging messages to prospective international students and put the brakes on growth in international student enrolment.

In 2010, foreign students represented 21 percent and 16 percent of higher education enrolment in Australia and the U.K., respectively, compared to less than four percent in the U.S. (OECD, 2012). This indicates a higher dependence of Australia and the U.K. on foreign students than the U.S. This dependence also had direct financial implications for universities where, for example, the

U.K. is projected to lose £2–3 billion per year in economic contributions of international students (Cavanagh & Glennie, 2012).

Aside from the aforementioned two global events, other major external influences on student mobility are demographic shifts and economic growth. The effects can be seen from the perspective of key source countries. Contrary to the top three destination countries maintaining their market share and rank order, the major senders of international students have considerably changed over the last decade. In 2000, the top three source countries of foreign students enrolled in OECD countries were China (7%), Japan (5%), and Korea (4%) – forming 16% of all mobile students. In comparison, China (19%), India (7%), and Korea (5%) have become the top source countries, now representing nearly 31 percent of all foreign student enrolment in 2010 in OECD countries.

This shift is a function of shifts related to demographics and economy in key sending countries. Within the last ten years, Japan's and Korea's population of those aged under 25 declined from 27% to 24% and 38% to 30%, respectively (World Bank, 2011). Even China and India – the countries with the largest population – experienced similar declines in the proportion of this age group from 41% to 35% and 53% to 48%, respectively. However, in absolute terms, China and India have more than one billion people in this age bracket as compared to nearly 45 million between Japan and Korea.

Demographics are one explanation for the shift in key source countries, but another is economic growth. China and India have seen dramatic growth in GDP, per capita in terms of purchasing power parity from 2000 to 2010. Within this time frame, China and India grew by 220% and 120%, whereas Korea and Japan rose by 67% and 31%, respectively (World Bank, 2012). Even more interesting is growth in high-net worth individuals (HNIs) with investible assets of US\$ 1 million or more. China experienced the growth in the number of HNIs from 320,000 in 2005 to 562,000 in 2011 as compared to India from 83,000 to 126,000 in the same period (Cap Gemini). The confluence of economic growth, a large youth population, and expanded access to education fueled the demand for global mobility.

The increasing ability of prospective students in rapidly developing countries like China and India to afford higher education overseas has collided with Australian and British institutions' increasing fiscal dependency on international students. More recently, discussions about the use of commission-based agents has gained momentum in the U.S. as many budget-constrained public institutions are looking to more aggressively recruit international students. Today, the rationale for international student recruitment has unfortunately shifted from attracting diverse talent to seeking additional sources of revenue. As a result (of the financially-driven model), universities are increasing over-relying on select countries, which not only compromises in-class and on-campus diversity but also poses financial risks. These issues highlight the importance of identifying and cultivating new source countries for recruiting international students (Choudaha & Kono, 2012).

As stated before, several push and pull factors play a role in the mobility of international students. We look at some of them here: types of internationally mobile students, mobility by disciplines, the language factor, the cost factor, the reputation factor, cross-border delivery, and the social factor (integration). The last one we address is the increasing global competition for talents and by that the strive to increase the stay rate of international students.

TYPES OF MOBILE STUDENTS

A recent study from World Education Services, *'Not All International Students are the Same: Understanding segments, mapping behaviour'* (Choudaha, Orosz, & Chang, 2012), highlights that international students differ in terms of their academic preparedness and financial resources which translates into different needs of students. Thus, lumping all international students into one category does disservice to students and misguides institutional practices and national policies. It identifies four types of U.S.-bound international students: *Strivers* [30%], *Strugglers* [21%], *Explorers* [25%] and *Highfliers* [24%].

Strivers [30%] are the largest segment of the overall U.S.-bound international student population. Almost two-thirds of this segment (63%) was employed full-time or part time during the application process, presumably because they need to support themselves.

Among all segments, they are the most likely to select information on financial aid opportunities among their top three information needs (45%). Financial challenges do not deter these highly prepared students from pursuing their academic dreams: 67% plan to attend a top-tier U.S. school.

Strugglers [21%] make up about one-fifth of all U.S.-bound international students. They have limited financial resources and need additional preparation to do well in an American classroom: 40% of them plan to take an ESL program in the future.

They are also relatively less selective about where they obtain their education. Only 33% of them selected information about a school's reputation among their top three information needs. *Strugglers* were found to be particularly likely to use agent services such as essay, resumé or personal statement editing.

Explorers [25%] are very keen on studying abroad, but their interests are not exclusively academic. Compared to the other segments, they are the most interested in the personal and experiential aspects of studying in the United States, with 19% of this segment reporting that information on student services was in their top three information needs during the college search.

Explorers are not fully prepared to tackle the academic challenges of the best American institutions and are the most likely to plan to attend a second-tier institution (33%). They are also the most likely to use the services of an education agent (24%).

Highfliers [24%] are academically well prepared students who have the means to attend more expensive programs without expecting any financial aid from the institution. They seek a U.S. higher education primarily for its prestige: almost half of the respondents in this segment (46%) reported that the school's reputation is among their top three information needs.

Highfliers, along with *Explorers*, form the emerging segment driven by the expanding wealthy classes in countries like China and India.

One can also distinguish between 'global' and 'glocal' international students. Global students, in particular *Highfliers* and *Strugglers*, are those who want to study abroad due to their strong desire for achievement

or emigration, respectively. Global students are different, as they would like to earn the social prestige and career edge offered by foreign education without having to go very far from home, and by that are more likely to look for transnational offerings at home. (Choudaha, 2013)

Although, there is no parallel analysis available for the types of international students headed to Europe or other regions, one can assume that the picture will not fundamentally differ from the U.S. context. One can also assume that *Strivers* and *Highfliers* more likely first attempt to go to the top institutions in the U.S. or the U.K., given the reputation of their higher education system and their position on the international rankings, which influence student perceptions. With the exception of the U.K., transnational offerings by European institutions of higher education are still limited and do not provide sufficient options.

What will be the implications for The Netherlands and student accommodation in The Netherlands of these trends? Most likely, we will attract at the bachelor level more strugglers and explorers than strivers and highfliers and they will primarily look for affordable accommodation. This applies to the master and phd level as well to a certain extent, with some exceptions in niche areas The Netherlands also being attractive to highfliers and strivers, in particular in the sciences and engineering, as there is also a small group of students from well to do families that will look for more luxury accommodation. For credit mobility students the situation is more mixed. The majority will also look for more affordable accommodation, but certainly there is a category of students that will look for short term luxury accommodation.

LANGUAGE

An increasing number of universities around the world move from teaching in their home language to teaching in English so as to attract more international students. In general, as the OECD observes: *"countries whose language is widely spoken and read such as English, French, German, Russian and Spanish, are therefore leading destinations of foreign students, both in absolute and relative terms"* (OECD, 2011, 323).

However, it would be too easy to state that language is the solution for attracting international students. Two articles address this. Bradford (2012) highlights linguistic concerns: *"the quality of teaching and learning that occurs when instructors and/or students are working in a non-native language"*; cultural challenges: *"lack of intercultural knowledge important for developing internationalized curricula, adopting more inclusive practices, and promoting reciprocal cultural understanding"*; and structural challenges: *"in addition to finding faculty to teach in the programs, any institution adopting English-medium instruction must also extend its administration and support services to cater to a new heterogeneous student and faculty body in English."* Likewise, Labi (2011) cites associate professor Karen Lauridsen at the Aarhus School of Business and Social Sciences, stating that *"it has become apparent that teaching difficulties are not simply a question of language but are rooted in profound cultural differences."* And she continues that even universities in Britain *"need to address the fact that they can't just teach in English the way they teach native speakers"*.

The issue of teaching in English has become a serious academic quality concern for all universities, whatever their mother language is. A more diverse faculty and student population in the classroom demands that universities address these academic issues related to teaching in English.

Teaching in English is not synonymous with internationalisation but is only one of several instruments for it. If one is using that instrument one has to also address the quality concerns that are related to it. Universities should think more strategically about when, where, how and why they should transfer programs from being taught in their mother language into English (or any other second language). (De Wit, 2012a)

LEVEL AND AREA OF STUDY

It is also important to look at how mobility is related to disciplines and the need for skilled migrants. According to the OECD, all countries show higher incoming student mobility relative to total enrolments in advanced research programmes. *“This may be due to the attractiveness of advanced research programmes in these countries, or to a preference for recruiting international students at higher levels of education because of their potential contribution to domestic research and development, or in anticipation of recruiting these students as highly qualified immigrants”* (OECD, 2012, 368). Likewise, in the U.S., nearly one out of five international students is enrolled at doctoral level (Open Doors, 2012). At the same time, recent growth in enrolment is driven by students from China and Saudi Arabia at bachelor’s level (Choudaha & Kono, 2012).

As for the areas of study, there seems to be a dominance of social sciences, business and law, followed by humanities, while there is a stronger need for engineering and sciences. To give one example from Europe to illustrate the differences in success in attracting more students in those two areas: in Sweden, according to OECD figures, 34.5% study engineering and 17.2% sciences; in Finland 31.7% and 11.2%; and in Denmark 19.3% and 10.3%, while in a country of similar size and quality of education, The Netherlands only 3.9% and 3.4% do so. In The Netherlands nearly half of the international students, 49.2%, study social sciences/economy/law. (OECD, 2012, 375)

Given these numbers, one could argue that even though The Netherlands has seen an increase in the number of international students over the past decade, the impact in attracting talents relevant for the economy is less than in the three Scandinavian countries. This might be related to the lack of a scholarship scheme focussed on students in engineering and sciences.

INCREASING THE STAY RATE: GLOBAL COMPETITION FOR TOP TALENTS

Currently, the most important driver for recruiting international students is the global competition for top talents in the knowledge economy. We observe related demographic and economic factors on a global scale. Northern America, Europe, Australia and Japan face a demographic challenge. For the OECD, *“over the next couple of decades nothing will impact on (member) economies more profoundly than demographic trends, and chief among them, ageing”* (Cotis, in Hawthorne, 2012, 420). The knowledge

economies of the OECD member countries require highly skilled people which, due to ageing and also due to less interest of their own youth in the hard sciences, will not be sufficiently available, and so skilled immigrants are needed to fill the gaps. A recent report entitled *The world at work: Jobs, pay, and skills for 3.5 billion people* speaks of a “mismatch between jobs and graduates” (McKinsey, 2012). The study claims that although there is global unemployment for 75 million young people, 39% of the employers indicate they have difficulties filling vacancies for skilled labour.

The pattern of low skilled immigration from the co-called South to the North of the past century has been replaced by a need for high skilled migrants. At the same time, the emerging societies in Asia, Africa and Latin America also need more skilled labor to develop their economies, resulting in a global competition for top talents. Several countries over the past decades have made it more attractive for highly skilled people to come and work, while at the same time restricting immigration of lower skilled people. These efforts have included:

- *“Post-study ‘job-search’ schemes that allow international students to stay in the country after graduation for the purpose of job seeking;*
- *the general streamlining of procedures for obtaining student visa and highly skilled work permits;*
- *amended naturalisation and permanent residency laws that take years of residence as an international student into account when assessing eligibility for acquiring citizenship/long-term residence status;*
- *the easing of work restrictions during the study and post-study periods;*
- *new visa categories specifically designed to attract and retain international students;*
- *privileges for international graduates when accessing certain visa schemes, e.g. lower minimum income requirements and the waiver of labour market tests (priority examination).” (Sykes, 2012, 9)*

A clear example is Canada, where immigration of skilled labour has received much support from federal and state governments. At the same time,

“by the early 2000s, skilled class entering immigrants (to Canada) were actually more likely to enter low-income and be in chronic low income than their family class counterparts, and the small advantage that the university educated entering immigrants had over, say, the high school educated in the early 1990s had largely disappeared by 2000, as the number of highly educated rose. What did change was the face of the chronically poor immigrant: by the late 1990s one-half were in the skilled economic class, and 41% had degrees (up from 13% in the early 1990s).” (Pico, Feng & Coumobe, 2007 cited by Hawthorne, 2012, 420)

Countries increasingly understand that immigration of skilled people is not always effective, and for that reason *“International students have come into the spotlight as an attractive group of prospective skilled immigrants”* (Sykes, 2012, 8). Where in the past, these countries would have an open mind to the receipt of international students in general and even subsidized their education, one can observe in several countries, in particular in Europe, a shift towards a more controlled immigration of international students and measures to increase their stay rate. The Netherlands, Denmark and Sweden are clear examples of such policies. Over the past decade they have on the one hand introduced full cost fees for non-EU students and at the same time developed scholarship schemes to selectively target talent and create

opportunities to stay after graduation. The Danish Minister of Science, Helge Sander, formulated that policy in the following way:

“We feared that with free education also for students coming to Denmark from outside Europe, the Danish universities would risk being flooded by non-EU/EEA citizens and that this would put a massive strain on the state educational expenses (...) But although Denmark introduced tuition fees, we secured the opportunity of studying for free in Denmark for highly qualified students by introducing a scholarship scheme. Through the funding for this scheme, the Danish state can control expenses associated with educating foreign students in Denmark.” (University World News no. 108, 24-1-2010)

The percentage of international students which stay after their graduation in the country of study, the so-called ‘stay-rate’, is on average 25% for OECD-countries (Sykes, 2012, 10-11), where the regional and local alumni retention rate in general is 60% for all graduates and 70% for master and doctoral graduates. Hawthorne (2008, 2010, 2012) and OECD (2011) warn that an increase of the stay rate is not a guaranteed solution for the needs of the national economies, both in quantitative and qualitative meaning, but still governments make increasingly more efforts to stimulate the stay rate of top talents. The benefits are clear:

“They confront few of the barriers experienced by foreign-trained professionals, in terms of host-country language ability, qualification recognition, or acculturation. Their productive lives will be longer, given their youth at point of enrolment. They present a palatable option for countries with ambivalent views on migration, in a context where demographic contraction is fuelling demand. (...) For many students, international education has become Stage 1 of a global career trajectory. Following graduation, they will address workforce undersupply and maldistribution, including the mismatch between the skills set of domestic workers and the needs of the knowledge economy. While their scale of longterm retention is unclear, former students will compensate for out-migration from host countries. (...) It is important to note that international students are becoming highly informed consumers, seeking the optimal global package” (Hawthorne, 2012, 432)

The obstacles are clear as well, as international students are increasingly becoming calculating consumers who explore the best options in their home country, their country of study, as well as in other countries. Lack of integration, discrimination, and lack of support are important push factors driving international students away after graduation.

A study by the European Migration Network on the immigration of international students to the EU shows that in recent year Member States have given more attention to policies and practices for attracting international students to the EU. At the same time, differences still exist, *“particularly in relation to access to the labour market during and after completion of studies, but also in relation to the benefits provided to international students when accessing the labour market and during their stay in general.”* (European Migration Network, 2012, 8)

The study *‘Mobile Talent? The staying intentions of international students in five EU countries’* (Sykes, 2012) summarized the results of an online survey among international students in Germany, The Netherlands, U.K., France and Sweden. Almost two out of three international students expressed the

intention to stay after their graduation for a shorter or longer period to work. The reality, though, is that only one out of four does so, with slightly more – one out of three – in France, which probably can be explained by the fact that international students in France have a stronger relation to French language and culture than what international students have for other destination countries. The study states:

“Although international students do possess a number of qualities that make them an attractive group of skilled migrants, they still require services and support to guarantee their integration. Emerging research findings and the results of this report indicate that simply studying in a country is not sufficient to overcome many of the difficulties migrants face, such as gaps in language proficiency, acculturation, visa insecurity and concerns about family migration and discrimination.” (Sykes, 2012, 7)

A recent Dutch study (SER, 2013) confirms that three themes are most crucial in increasing the stay rate of international students in The Netherlands: the need for better preparation for the Dutch labour market during the period of study; Dutch language, culture and social life; and better facilities, in particular accommodation.

The housing corporations can address the latter issue – with certain limitations put on them by national regulations – but on other aspects they need the national government, local governments, universities and companies to work together. The decision by the Dutch government to accept the recommendations of the SER and work on these is positive but will require joint efforts from all stakeholders.

What might be the implications for accommodation needs of increasing the stay rate? It might imply that a certain group of students will need longer accommodation as they will extend their stay at the bachelor level to master and phd but in particular those at the master level to phd. This number will be minor though, as it implies only for sciences and engineering. Delft might see more extensions than Amsterdam for that reason, but the number will be overall small.

OTHER FACTORS

Besides languages and levels and areas of studies there are other push and pull factors that play a role. Reputation, as expressed in rankings by area of study, institution and by higher education systems, is increasingly becoming a pull factor, in particular for *Strivers* and *Highfliers*.

Costs of study, both tuition fees and costs of living, are another factor. As tuition fees in the U.S. and the U.K. increase and several European countries introduce full costs fees for non-EU students (e.g. Denmark, Sweden, The Netherlands), students and their families are more likely to take tuition fees in combination with costs of living into consideration.

The study makes clear that the cost of studying in Germany is only one sixth of that in Australia. The Netherlands was not included in this study, but the costs would probably be for non-EU students in the range of Japan and for EU-students in the range of China, given the differences in tuition fees between the two groups, something not the case in Germany. It also indicates that the lower the cost of tuition fees and other costs, the more important accommodation costs will be as part of the overall budget.

There is also increasingly the option of studying at a foreign university in the own country or region, and making cross-border delivery of higher education an alternative option. Although the number of branch campuses and franchise operations by foreign universities is increasing, its impact is still limited both in numbers and origin of providers (primarily the English speaking world). Some consider the recent offer of Massive Open Online Courses (MOOCs) an alternative option for international students to access higher education at no or low costs, although its impact is still unclear. More likely it will stimulate the interest for degree study abroad than being an alternative for it.

A recent study by HSBC makes the cost factor clear. According to HSBC *“today there are more than 3 million people in higher education in a foreign country. But as many countries reduce the levels of state subsidy, students and their families have to plan more carefully than ever to meet the cost of tuition and living expenses. Australia is according to this study the most expensive country for overseas students to study in. The combined average cost of university fees and living expenses in Australia puts the average cost at more than USD38,000 per year for international students. The USA is the second most expensive country for overseas students, with the combined average cost of university fees and living expenses putting the annual cost at more than USD35,000. The UK is third, with annual costs of more than USD30,000. According to the United Nations Education, Scientific and Cultural Organisation (UNESCO), these two popular destinations attract three in ten international students.”*

Malik Sarwar, HSBC’s Global Head of Wealth Development said: *“With rising affluence, particularly in developing markets, and an increasingly competitive workplace that demands quality skills and a global outlook, we expect appetite for international education to continue to grow. Even though the market for higher education remains segmented and therefore mispriced at an international level, the cost is going up everywhere as government subsidies are rolled back. Those who wish to educate their children overseas have to factor in tuition fees, living costs, exchange rates and inflation. There is a need for parents to ensure their children’s education forms an important part of their financial planning.”*

TABLE 1. AVERAGE ANNUAL COST OF STUDYING ABROAD FOR INTERNATIONAL STUDENTS

Country	Annual fees (USD)	Annual cost of living (USD)	Annual total (USD)
Australia	25,375	13,140	38,516
United States	25,226	10,479	35,705
United Kingdom	19,291	11,034	30,325
United Arab Emirates	21,371	6,004	27,375
Canada	18,474	7,537	26,011
Canada	18,474	7,537	26,011
Singapore	14,885	9,363	24,248
Hong Kong	13,182	9,261	22,443
Japan	6,522	12,642	19,164
Russia	3,131	6,310	9,441
China	3,983	4,783	8,766
Taiwan	3,270	4,987	8,257
Spain	1,002	6,004	7,006
Germany	635	5,650	6,285

<http://www.hsbc.com/news-and-insight/2013/study-costs-most-in-australia>

SUMMARY AND CONCLUDING REMARKS

In summary, international student degree mobility patterns are an outcome of a complex interplay of external and internal and push and pull variables. These include variables like 9/11, the global financial crisis, demographic factors and the development of the global knowledge economy. As a result of an increasing pace of globalization, complexity and intensity of external variables will also continue to increase and hence predicting the future of mobility will become more and more difficult. Despite this limitation it is safe to predict that overall mobility will continue to grow while the relationship between key sources and countries may significantly alter with any major external event like the outcome of the Euro zone crisis.

The growth of international student mobility is not coming to an end yet, and will for several years still be dominated by current major sending and receiving countries. However, at the same time, one will see a gradual diversification in both sending and receiving countries, with global competition for students becoming more dominant and big sending countries like China, India, South Korea, Singapore, Malaysia, South Africa, Russia and Brazil, also becoming receiving countries.

There will be more focus on increasing the stay rate of the best students and scholars. Scholarship programs will increase but be more selectively focussed on top talent, where other students will have to pay higher tuition fees when studying abroad.

For the coming decade, teaching in English will continue to be a pull factor, although increasingly other languages, in particular Spanish, will become an alternative.

Reputation, expressed in international rankings, will also stay an important pull factor: the better the reputation of the education system of the country and/or of the individual university, the more likely international students, in particular *Strivers* and *Highfliers*, will be aspired to go there.

Cross-border delivery of higher education, i.e. instead of the movement of students from one country to the other the trend to move programmes (franchises) and institutions (branch campuses) will continue to increase and become an alternate option for international students, as costs and social factors will become more attractive. But all in all, it will remain a minor percentage within the overall offerings in higher education in the decades to come, in continental Europe with its large public higher education sector and certainly in The Netherlands where the government puts severe limitations on franchise and branch campus initiatives by Dutch universities. MOOCs will increasingly become a factor in international higher education, but instead of becoming an alternative for study abroad, they will stimulate the interest of students to study in another country and to attend a university with a good reputation abroad.

To sum up, the future of global student mobility will continue to interact with a number of variables and become even more complex with the emergence of new variables like MOOCs, however, the growth momentum is expected to remain healthy.

GLOBAL TRENDS IN STUDY ABROAD AS PART OF THE HOME DEGREE

The analysis on international student mobility above has been focussed primarily on what is called degree mobility: students that study in another country for their bachelor, master or phd degree. Study abroad as part of the home degree is in absolute numbers and in social, political and economic impact less a factor than the degree mobility, as described above, although its importance in Europe should not be neglected, in particular in the regional, national and institutional policies, but also in the presence and impact of the presence of these students in European institutions and cities.

If one compares study abroad for the home degree in Europe and even the U.S. to other parts of the world, there is still a long way to go. In other countries, such as Australia and Canada, the numbers are comparable to the U.S. In Japan this is far less the case, even though recently the Japanese government has initiated plans to stimulate study abroad. In Latin America, Asia and Africa, study abroad is still relatively absent. We know little known about the impact of study abroad on employability, skilled migration and degree mobility, but it is generally assumed that there is an impact, and in that sense, study abroad can be seen as a major push factor in stimulating degree mobility and skilled migration in that region of the world.

In the U.S., only 1.4 % of the total student population spends some time abroad, predominantly white (80.5%) undergraduate (nearly 89%) students, with Europe (54.5%) still being largely the destination and only 4% going for a whole academic year. (De Wit *et al.*, 2012, 3) And although in absolute numbers and diversity the participation and location of study abroad over the past decade has increased, and in both national and institutional policy statements its relevance is more and more emphasized, the percentages stay very small and the length of the experience is declining.

In Europe, in 2012 the 25th anniversary of the European flagship programme, ERASMUS, funded by the European Commission, was celebrated amid fears of becoming a victim of its own success due to the increased numbers but reduced funding. In 1987, 3.244 students spent a part of their ERASMUS study in another member country. Three million students have followed their example in the past 25 years and the number of countries has grown from 11 to 33, including non-EU members states such as Croatia, Iceland, Lichtenstein, Norway, Turkey and Switzerland. The budget of the programme for the period 2007-2013 is EUR 3.1 billion.

More than in numbers of mobile students, the impact of the programme has been on the internationalisation and the reform of higher education. Erasmus has paved the way for the reform of European higher education under the Bologna Process, has been a pilot for its credit point system ECTS, and was an initiator for the opening up to countries in Central and Eastern Europe to EU-membership, as it is for current aspiring candidate members. It also inspired cooperation between Europe and the rest of the world, and – unfortunately still with little success – similar initiatives in other regions. The programme stimulated both national governments and institutions of higher education to develop European and international strategies.

Accompanying these success stories, however, is also an increased concern about the focus on numbers and percentages, which detracts from the need to concentrate on the content and the quality of the international experience. In the early years of the ERASMUS programme, the enthusiasm of faculty – encountering their colleagues, learning about their curricula and teaching methods – was driving the success and the impact of the programme. Erasmus has moved away from those inspiring days and has become too much a bureaucratic exercise, in which only numbers count. If the Erasmus programme could get back of its focus on curriculum and learning outcomes of the past, not only would it enhance the quality of the experience but it would also increase the interest of the faculty and the students, and as a result probably also the numbers (See De Wit, 2012b).

Study abroad as part of the home degree will increase as well in the years to come and will become more a factor in other parts of the world than only in Europe, North America and Australia/New Zealand. This will also have a push effect on degree mobility.

STUDENT MOBILITY IN EUROPE

In the 1960s and 1970s, the international dimension of European higher education was still marginal. The landscape was dominated primarily by the movement of students from developing countries – mainly former colonies – to Europe and by some outwards circulation of students and scholars from Europe to the US. There was also a concentration on development aid through higher education mechanisms during this period. In the 1980s however, two different shifts occurred in Western Europe. The “benevolent *laissez-faire*” policy (Baron 1993, 50) and the “humanitarianism and internationalism” (Chandler 1989, viii) that characterised the previous decades did not completely disappear, but these approaches were bypassed by new policies. In continental Europe, first a movement took place towards the more systematic and planned reception of degree-seeking students from abroad, followed by more extensive intra-European cooperation and exchange in the form of student and staff mobility. In parallel, and different from the rest of the continent, the UK began to actively recruit fee-paying (degree-seeking) international students.

The discussion about international student flows in Europe is closely linked to, and influenced by, the developments and differences that exist between European countries with regard to tuition fees. The 1979 decision by the British government to introduce full-cost fees for foreign full-degree students (a move from “aid-to-trade”) clearly distinguished this country from the rest of Europe and immediately resulted in a more competitive higher education subsector in the UK. In contrast, in continental Europe the introduction of full-cost fees, and the attendant treatment of higher education as an export commodity, remained anathema for more than two decades. From the mid-1980s onwards, “enhanced cooperation” is the phrase that best describes the higher education situation on the continent, notably under the impetus of EU programmes, and in particular thanks to the 1987 launch of the European Action Scheme for the Mobility of University Students (ERASMUS). The driving rationales behind these initiatives were both Europeanisation – ostensibly to contribute to European integration under the framework of the

European Communities (that were soon to become the European Union) – as well as strengthening Europe’s position in the global economy.

What characterised the European higher education landscape in this period was diversity, despite several areas of joint action. By the beginning of the new millennium, some of the differences related to tuition practices that had existed between the UK and such places as The Netherlands, some Scandinavian countries, Germany and France, began to fade. Yet, while several European countries – including Denmark, The Netherlands, Sweden, and Finland and others discussing the option – have or will soon introduce full-cost fees for non-EU/EEA students, the rationale behind this trend is very different from that of the UK. The main drive in these four countries has not been income generation but rather the attempt to ease the financial burden on domestic taxpayers and to ultimately ‘attract’ better quality students from abroad.

Keeping in mind these various developments across Europe during the past several decades, the trends in international student flows to and from Europe prove all the more interesting. Although it hosts less than a tenth of the world’s total population, Europe is and has been doing remarkably well in attracting degree-seeking foreign students. Over the last ten years, it has in fact been the most popular continent for study abroad, receiving more than half of all students who studied towards a degree outside their country of origin.

In contrast to other major study destinations, like the US – whose ‘market share’ has continuously dropped after 2001 – Europe has managed to preserve its position on the global education market, despite growing competition from non-traditional study destinations like China, India or Japan. In 2006/07, 1.5 million foreign full-degree students studied in 32 European countries – an all-time high, corresponding to 6.9% of all students enrolled in this region of the world and 50.9% of the total number of foreign students worldwide (Teichler et al., 2011). The number of foreign students in Europe has unquestionably gone through a marked increase from 1998/99 levels, when the number of foreign nationality students enrolled in Europe stood at only 827,000. Equally interesting, the number of foreign students in Europe increased at a much faster pace than the total number of students pursuing higher education studies in this region – which could point to Europe’s increased attractiveness as a study destination (Teichler et al., 2011). The European Commission, in its document ‘Supporting growth and jobs – an agenda for the modernisation of Europe’s higher education systems’ concludes for the future: *“Attracting the best students, academics and researchers from outside the EU and developing new forms of cross-border cooperation are key drivers of quality”* (2011, p. 6) and intends to *“promote the EU as a study and research destination for top talent from around the world.”* (ibid, p. 14)

Yet, this impressive macro-level picture tells only one part of the story. For example, two-thirds of all foreign students in Europe are concentrated in just three countries, namely the UK, Germany and France, which means that the European mobility average is strongly influenced by mobility developments in these three countries. Furthermore, the European average says little about student mobility at the level of individual European countries (see Table 2). In absolute as well as in relative terms, ‘variety’ is the word that best describes the status quo at the national level. Indeed, the total number of foreign students ranges from close to 460,000 in the UK to just 607 in Malta, while foreign students as a share of total enrolment spans from 26.9% in Cyprus to 0.6% in Poland.

TABLE 2. FOREIGN STUDENTS IN INDIVIDUAL EUROPEAN COUNTRIES, 2006/07

Europe 32 host countries	Absolute numbers	Percentage of the total student population
AT Austria	43 572	16.7
BE Belgium	47 218	12.0
BG Bulgaria	9 351	3.6
CH Switzerland	41 058	19.3
CY Cyprus	5 973	26.9
CZ Czech Republic	24 483	6.8
DE Germany	258 513	11.3
DK Denmark	20 851	9.0
EE Estonia	2 200	3.2
ES Spain	59 814	3.4
FI Finland	10 066	3.3
FR France	246 612	11.3
GR Greece	21 160	3.5
HU Hungary	15 110	3.5
IE Ireland	16 758	8.8
IS Iceland	783	4.9
IT Italy	57 271	2.8
LI Liechtenstein	594	88.3
LT Lithuania	1 920	1.0
LU Luxembourg	-	n.a.
LV Latvia	1 433	1.1
MT Malta	607	6.2
NL The Netherlands	37 815	6.4
NO Norway	15 618	7.3
PL Poland	13 021	0.6
PT Portugal	17 950	4.9
RO Romania	12 188	1.3
SE Sweden	42 769	10.3
SI Slovenia	1 511	1.3
SK Slovakia	2 010	0.9
TR Turkey	19 257	0.8
UK United Kingdom	459 987	19.5
TOTAL	1 507 473	6.9

Source: UOE 2010

The regions and countries of origin of foreign students in Europe present an even more nuanced picture. The foreign degree-seeking student body in Europe is comprised both of nationals of European countries that study in a European country other than their country of origin (intra-European mobility), as well as students coming from outside of Europe. In 2006/07, non-Europeans accounted for 49.9% of the foreign student body in Europe, while intra-European degree mobility accounted for 46.7% (rest unknown). Over time, the number of non-Europeans studying towards a degree in Europe has increased much faster than the number of European students enrolled in European countries other than their country of origin. It grew from 365,000 in 1998/99 to 745,000 in 2006/07. Chinese students are the largest national group of foreign students in Europe – 123,000 in 2006/07. They accounted for 8.2% of total foreign enrolment in Europe in this year, followed at some distance by Germans (75,000), French (53 000), Italians (41,000) and Poles (39,000).

In contrast, 673,000 European students studied towards a degree outside their country of nationality in 2006/07, making Europe a net importer region of foreign students, or, to put it differently, a net exporter of higher education (Teichler et al., 2011). The study abroad ratio of Europeans in 2006/07 was 0.033, meaning that for every 1,000 European students enrolled in Europe there were 33 Europeans enrolled abroad. Enrolment abroad also grew during the last decade (by 37%), though at a slower pace than foreign enrolment in Europe (which grew by 82%). But, as in the case of foreign enrolment, stark differences exist between European countries (Table 3). Countries with very high study abroad ratios are Iceland (0.251), Malta (0.117), and Cyprus (1.380), i.e. countries with limited higher education capacity 'at home'. At the other end of the spectrum, the UK has a study abroad ratio of just 0.012. In other words, for every 1,000 British students in the UK, as few as 12 UK students are enrolled abroad. The linguistic factor is often blamed in the literature as main the cause of this UK handicap – foreign languages have been non-compulsory in the UK at the level of the General Certificate of Secondary Education (GCSE) since 2004. Table 3 provides a comprehensive snapshot of data relevant to this issue.

Looking at favourite destinations of European students, there is a clear preference for other European countries. Indeed, 85.5% of European nationals who studied towards a degree abroad in 2006/07 stayed within Europe – an increase from 82.2% in 1998/99 (Teichler et al., 2011). While the US and Australia remain important destination countries for European students, their appeal seems to be waning. The UK and Germany are clearly the preferred destinations of European students who study abroad in pursuit of full degrees.

While the body of knowledge and data covering degree studies abroad is richer now than 10 years ago, further advances should be achieved in international data collection in order to capture genuine cross-border mobility for studies rather than simply nationality information about students. And while most data collection activity focuses mainly on diploma mobility, fairly little is known at the international level about the full extent of international credit (temporary/short-term) mobility, which occurs in the course of on-going studies. At the European level only the ERASMUS Programme sheds some light in this direction; in addition to the figures presented above, about 200,000 European students are mobile every year through ERASMUS, i.e. just below 1% of all students in Europe. ERASMUS, of course, accounts for only part of all European credit mobility that takes place every year.

TABLE 3. EUROPEAN STUDY ABROAD (DEGREE-SEEKING) STUDENTS, 2006/07

Country of nationality of study abroad students	Absolute numbers	Ratio of students enrolled abroad to nationals enrolled at home
AT Austria	12 965	0.060
BE Belgium	10 355	0.030
BG Bulgaria	26 623	0.107
CH Switzerland	9 850	0.057
CY Cyprus	22 411	1.379
CZ Czech Republic	8 419	0.025
DE Germany	87 750	0.043
DK Denmark	6 838	0.032
EE Estonia	4 020	0.060
ES Spain	29 027	0.017
FI Finland	9 838	0.033
FR France	61 593	0.032
GR Greece	38 231	0.066
HU Hungary	8 551	0.021
IE Ireland*	30 204	0.174
IS Iceland	3 771	0.251
IT Italy	45 044	0.023
LI Liechtenstein	747	9.456
LT Lithuania	8 532	0.043
LU Luxembourg	7 148	n.a.
LV Latvia	4 680	0.037
MT Malta	1 074	0.117
NL The Netherlands	14 433	0.026
NO Norway	13 646	0.068
PL Poland	41 896	0.020
PT Portugal	16 639	0.048
RO Romania	24 597	0.027
SE Sweden	15 791	0.043
SI Slovenia	2 699	0.024
SK Slovakia	25 466	0.118
TR Turkey	56 555	0.023
UK United Kingdom	23 393	0.012
TOTAL	672 786	0.033

Source: UOE 2010

This impressive growth in numbers over the past decade was mirrored by an unprecedented level of attention paid to student mobility in national and European-level policy circles. Much more than in other parts of the world, student mobility has been promoted in Europe as an intrinsically positive and desirable development, and has become at many levels a policy goal in itself. The extent to which the existence of mobility policies and targets has been instrumental for the recent mobility trends is yet to be established. What is apparent, though, is that significant growth has been achieved both in countries with clearly-articulated mobility (internationalisation) policies like the UK, Germany, or the Nordic countries, as well as in countries which still lack such strategic approaches.

While the numbers are still important, it is also notable that many European countries are moving to more qualitative reflections about mobility. This interest is manifested in many forms. Some countries undertake measures to ensure that not only 'more' but also 'the best' students from abroad access their higher education systems. Others are designing measures to guarantee that the mobility period abroad or at home is of 'good quality', while others have become particularly interested in exploring the question 'Why mobility?' and in researching the academic, personal or professional impact of international mobility experiences.

At the same time, worries about some 'unintended consequences' of international student mobility are starting to be voiced. Discussions about imbalances in mobility flows are increasingly being raised by countries which find themselves in an unfair position, displaying either higher outflows than inflows, or the opposite. Austria for example, but also the French Community of Belgium, have been particularly worried about the large inflow of foreign students from two neighbouring countries – Germany and France, respectively – into their medical and paramedical study programmes. These countries have argued that this situation has posed severe limitations on the access opportunities of their own nationals to this highly critical field of study. To counteract this trend, the two countries have imposed a quota system on foreign students, a decision largely criticized in Europe and currently scrutinised by the European Court of Justice. Recently, The Netherlands has become also concerned of the costs of the large inflow of German students in the country, in particular at the border institutions of higher education, but those concerns have been stilled as the result of a study indicating that the economic benefits of having those students are bigger than the costs, in particular for the border regions, where most of them study.

The current debates in Europe on the positive and negative dimensions of the multicultural society, immigration and the economic and financial crisis also have a direct link to international students and skilled immigration needs. In Ireland, the international education strategy 2010-2015 to make Ireland *"internationally recognised and ranked as a world leader in the delivery of high quality international education"* (2010, p.12) by among others increasing the present number of international students in the coming 5 years by 50%, is under pressure as a result of the budgetary crisis. In the UK, the policy of the conservative-liberal government to introduce restrictions on immigration and higher national student fees will have an impact on the number of international students from outside (immigration) and inside the EU/EFTA countries (higher fees) as well as on the potential emigration of UK students (lower fees in neighbouring countries). In Germany, when prime minister Andrea Merkel proclaimed the collapse of the multicultural society and a push for stricter immigration laws arose, the minister of Economic Affairs, the business sector and the higher education sector warned instantly for the danger of lack of skilled labour. In Switzerland there is a high concern that recent anti immigration referenda results will have

a negative impact on skilled immigration and attractiveness of the country for international students. And in The Netherlands, Denmark, Sweden and Italy, to name just a few countries, similar fears exist due to anti-immigrant nationalist politics. It creates some tension to the call for top talents and the increase of the stay rate of international students.

In summary, Europe both in degree and in credit mobility is the most important factor in the global competition of students. Although in both cases this mobility is primarily internal within Europe and dominated by the three main countries: the UK, Germany and France, the market share for degree mobility over the past years has not decreased, also not the number of degree and credit students from outside of Europe. Both in tuition fees, increased provision of English as language of instruction next to the own national languages, attractiveness of higher education systems and institutions as well as society and culture, and opportunities for staying after graduation, continental Europe scores in general well in comparison to the English speaking lead countries United States, UK and Australia. Increased competition from new emerging countries, high costs of living and increased costs of tuition fees for non-EU students, increased anti immigrant spheres as well as bureaucratic obstacles (visa, work permits) and lack of facilities (accommodation in particular) are the main challenges. On the other hand, the trend to attract more top talents and increase their stay rate will make Europe more attractive, be it primarily for students in the sciences and engineering. For these students it is expected that scholarship schemes will compensate for the increased costs of tuition fees and living, including accommodation.

THE DUTCH CASE

The Netherlands is a clear example of a mixed policy of cooperation and competition with regard to international students and immigration. The topic of international students and skilled immigration is a key issue in Dutch politics. The debates on the positive and negative dimensions of the multicultural society, immigration and the economic and financial crisis have a direct link to international students and skilled immigration needs. The country has moved from an focus on aid via a cooperation and exchange priority to a more competitive approach with respect to international students and immigration. This mixed policy with shifting emphasis is the result of external factors in combination with local changes in higher education and immigration policies. In reaction to concerns from some parties in the parliament about the high costs for the tax payers of the number of international students studying in The Netherlands, in particular from Germany, a study of the Central Planning Office (CPB) commissioned by the Dutch government demonstrated that the long term benefits for the economy are higher than the costs (Staatssecretaris OCW, 16 mei 2012).

The number of international students in Dutch higher education has increased over the past years in absolute numbers, and over the past years increased to an 8.4% of the total number of students in 2011-2012. The market share of The Netherlands is 1.2% of the global market in 2007, an increase of 0.7% compared to 2000. The increase over the past five years has been particularly in research universities, 6.3% to 11,2% in 2011-2012 and less in the universities of applied sciences, 5.8% to 6.8%. Growth in the sector of universities of applied sciences has stopped, there is recently a slight decrease. Currently 51% of international students follow education at a university of applied sciences against 49% in research universities, but if trends continue this will shift in the coming years. Specialised universities, such as the Rietveld Academy, Coadarts, The Hague Arts University of Applied Sciences and the Hotel Management School in The Hague have the highest percentage of international students as part of their student body. Only Maastricht University is a broader research university among this group. In absolute

numbers Maastricht University has the most international students, followed by Fontys University of Applied Sciences, Saxion University of Applied Sciences, Groningen University and the Technical University Delft. This is a reflection of on the one hand the strong inflow from German students and the competition for talents in engineering. The University of Amsterdam has the most diverse international student population. (Nuffic, 2012)

The main country of origin in 2011-12 was Germany (45% of all international students), showing though a decrease in absolute numbers over the past year, The Netherlands is now bypassed by Austria as the country receiving most students from Germany. At a substantial distance, Germany is followed by China and Belgium. Bulgaria is number four, followed by Greece and the UK. The next group consists of Italy, France, Poland, Turkey, Romania, Indonesia and Spain. The increasing number of students from Greece (in particular to the TU Delft), Italy and Spain is a reflection of the economic crisis in these countries and the search for alternate opportunities. Also a growth in the number of students from Central and Eastern Europe (Bulgaria, Poland, Romania, Baltic States) is noticeable. The increase from the UK is a consequence of the introduction of higher fees in that country and the related active campaign of some Dutch universities to attract them. Most of the international students came from other EU and EFTA countries, compared to the rest of the world. (Nuffic, 2012)

Three quarters of the international students are enrolled in bachelor's degree programmes, although in research universities the focus is increasingly on master and phd programmes. As far as fields of study are concerned Economics is for the research universities the most popular study, with agriculture having the strongest presence of international students compared to Dutch students. For applied sciences universities, Economics also has the strongest presence of international students while Art and Culture maintain a strong ratio of international versus Dutch students. University Colleges take an increasing share of the international students as well.

Given that two third of the international students in The Netherlands come from EU/EFTA countries, the impact of the introduction of full cost fees for non-EU/EFTA students is not as negative as was the case in Denmark and Sweden.

There are no concrete data on international phd students and researchers in The Netherlands. A recent guess is that one third of the phd students in The Netherlands is foreign, a rapid growth over the past 15 years, primarily from Western Europe and Asia. OECD data indicate that half of the foreign knowledge workers in The Netherlands come from Europe, and the other half primarily from South and East Asia, followed by North America.

Since 2007, it is possible for international students to stay in the country for a year after completion of their studies in order to find a job, and since 2009 highly qualified foreigners can apply for a residence permit for a maximum of one year to find a job or to start a business. There are also tax incentives for knowledge immigrants and returning expats in areas where there is lack of Dutch candidates. And migration policies are adapted to make immigration for lower skilled immigrants more difficult and for highly skilled immigrants more easier. There are no data yet to see how effective these measures have been. Also, little is known about the language factor. Although some studies indicate that the fact that Dutch persons speak and understand English and that an increasing proportion of Dutch higher education

offer is in English (in particular at the master and phd level) is a pull factor, other studies question the level of English of Dutch graduates and faculty. Also, some studies indicate that The Netherlands is not attractive enough for international and returning Dutch researchers. Other studies though conclude that The Netherlands is still more attractive than other European countries, such as the United Kingdom, Germany, France, Denmark and Belgium, because of the relatively good salaries, career prospects and knowledge infrastructure. Although there is a more severe policy in place with regards to immigration, there is a common understanding of the need of skilled immigrants in the sciences and engineering and certain other fields where there is expected to be a shortage of educated people in the future. There is also a common understanding that the best way to fill those gaps is by attracting more international students in those fields and increase their stay rate.

As mentioned, a recent Dutch study (SER, 2013) confirms that three themes are most crucial in increasing the stay rate of international students in The Netherlands: the need for better preparation for the Dutch labour market during the period of study; Dutch language, culture and social life; and better facilities, in particular accommodation. The government has take over these recommendations. It will require joint initiatives from all stakeholders, including housing corporations, to implement them effectively.

In summary, Both in incoming degree and credit mobility The Netherlands is a relevant but not a top player. Europe is the key region of origin of the international students coming to The Netherlands, with Germany being dominant for degree mobility. At the same time there is a steady but slow increase of incoming students from other parts of the world, and a gradual shift from bachelor to master and phd level and from universities of applied sciences to research universities. Humanities and social sciences are dominant studies with a strong arts and university college component. In the global competition for top talents in the sciences and engineering, The Netherlands by that has a disadvantage. Efforts are made to increase the stay rate of top talented international students, their accommodation is seen as an important factor next to language, culture and social life.

CONCLUSIONS AND EMERGING ISSUES

International student degree mobility patterns are an outcome of a complex interplay of external and internal and push and pull variables. These include variables like 9/11, the global financial crisis, demographic factors and the development of the global knowledge economy. As a result of an increasing pace of globalization, complexity and intensity of external variables will also continue to increase and hence predicting the future of mobility will become more and more difficult. Despite this limitation it is safe to predict that overall mobility will continue to grow while the relationship between key sources and countries may significantly alter with any major external event like the outcome of the Euro zone crisis. The growth of international student mobility is not coming to an end yet, and will for several years still be dominated by current major sending and receiving countries. However, at the same time, one will see a gradual diversification in both sending and receiving countries, with global competition for students becoming more dominant and big sending countries like China, India, South Korea, Singapore, Malaysia, South Africa, Russia and Brazil, also becoming receiving countries.

More specific for Europe, this region both in degree and in credit mobility is the most important factor in the global competition of students. Although in both cases this mobility is primarily internal within Europe and dominated by the three main countries: the UK, Germany and France, the market share for degree mobility over the past years has not decreased, also not the number of degree and credit students from outside of Europe.

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What are some of the implications for accommodation of international students?

1. The number of international students, both credit and degree, will continue to rise, but only gradually by year. So, the accommodation demand will also rise slowly.
2. For the coming years a mix of both bachelor (undergraduate), and master and phd (graduate) students can be expected to continue, both in degree and credit mobility. A gradual shift to more master and phd students can be seen. Graduate students will require a slightly higher level of accommodation and services.
3. As a result, one can see a great variety of durations of stay, from 3 months up to 4 years.
4. Where there is a dominant presence of degree seeking students from Germany in the Eastern part, in the western part of The Netherlands, there will be a more diverse composition of the international student body. For the level and services, the implications are less clear and will depend more on the social and economic background of the student.
5. There will be a great variety of social and economic backgrounds, from well to do self funding to poorer, subsidised students. The majority of the students will have limited resources and by that will not be able to invest much in rent and living costs. Those few who can, will react positively to the offers from private more luxury accommodation initiatives.

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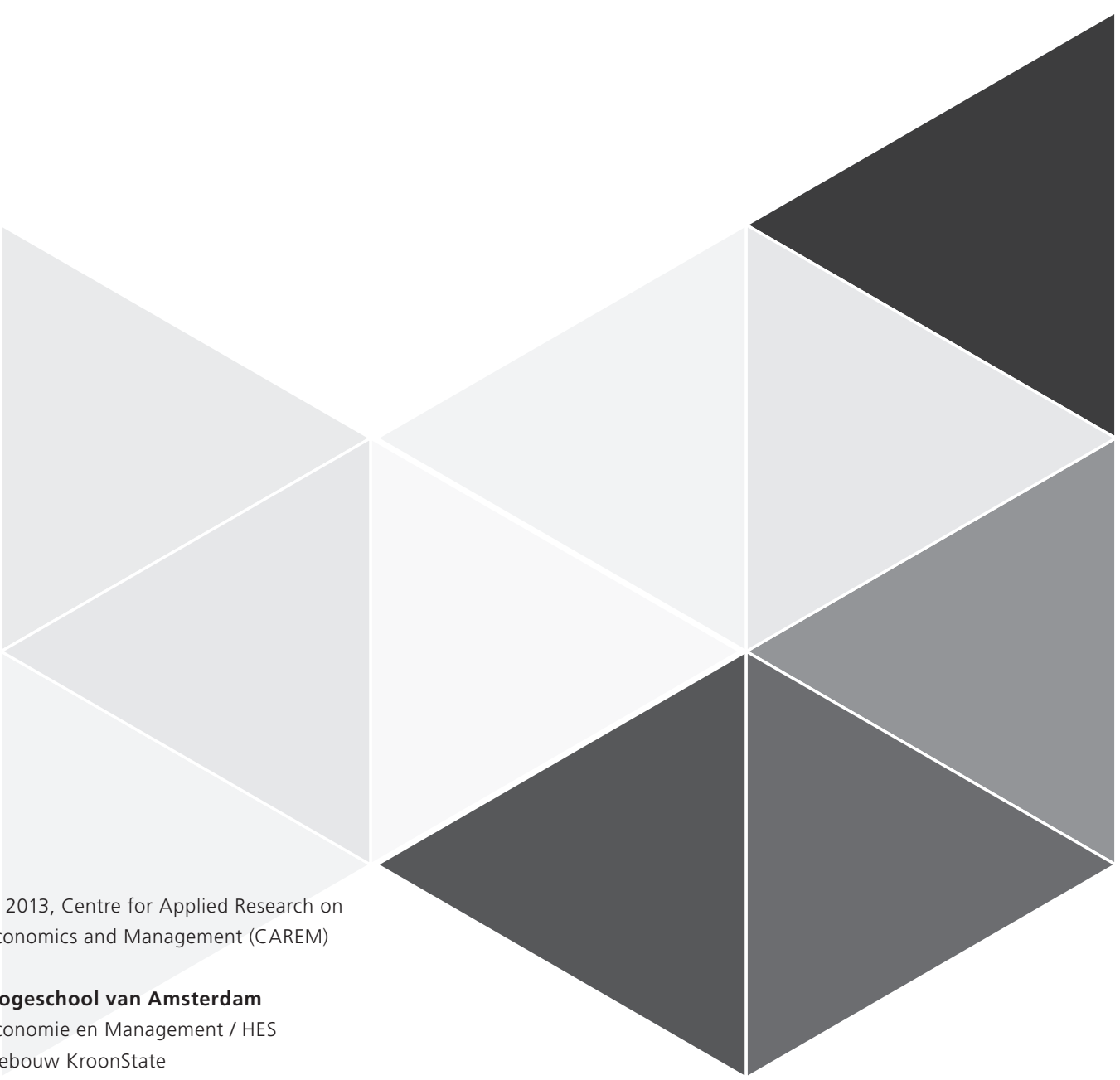
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