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Report

International Student Mobility: Patterns and Trends

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International Student Mobility: Patterns and Trends

Abstract:

The international student market is changing. An increasing number of higher education opportunities for study at home and abroad is contributing to rising competition in the international student market. In an attempt to attract the growing number of prospective students seeking higher education, individual institutions and national governments are looking to differentiate themselves from their competitors. In an attempt to do so, they are developing and implementing targeted recruitment strategies to grow new markets or expand in already established ones. Motivational factors in the decision-making process for student application to an overseas destination include employment and residency opportunities, the quality of the 'student experience', including accommodation and social activities, and the costs associated with an international education. Through an analysis of national data produced by official government sources, this report provides a comprehensive overview of recent patterns in international student mobility, assesses current factors influencing government policy towards strategic recruitment and identifies future trends likely to affect mobility in coming years.

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International Student Mobility: Patterns and Trends

1 Introduction

International student mobility has over the past 10-15 years become an increasingly important part of the global higher education landscape. The total number of mobile tertiary education students was estimated to have reached more than 2.7 million in 2005¹, a nearly 61% increase since 1999². Traditionally, more than 90% of international students have enrolled in institutions in countries belonging to the Organisation for Economic Co-operation and Development (OECD) with the main destinations (the US, the UK, Germany, France and Australia) recruiting over 70% of them. Significant year-on-year growth was recorded in the late 1990s and early 2000s in most of the main English-language destinations with major source countries such as China and India providing a large number of enrolments each year.

Significant changes in the infrastructures and capacity of higher education systems across the world partially explain why there has been such growth in such a short time. The large majority of national governments have been allocating more funds to higher education to improve the quantity and quality of tertiary education being offered within their borders. Even so, capacity is insufficient to meet demand in the major source countries. At the same time, with higher household levels of wealth and rising GDP per capita, more students from across the world are able to participate in higher education abroad, especially those from countries with rapidly growing economies. The total number of worldwide tertiary enrolments is 40% higher than it was seven years ago, with more people participating in higher education than ever before.

In the past, many countries expected such growth to continue. In 1999, the Australian international recruitment organisation IDP Education Pty Ltd., which is partly owned by the country's 38 universities, projected that the demand for higher education would triple between 2000 and 2025 to an estimated total of 7.2 million potential students. Asia was thought to have by far the greatest growth potential and was expected to account for 70% of global demand in 2025. Within Asia, India and China were identified as the main growth markets and estimated to account for 50% of the global demand for international higher education in 2025³. A few years later, another study followed from one of the United Kingdom's major international education organisations. In its 'Vision 2020' publication from 2004, the British Council projected that overall demand for international higher education would increase from 2.1 million places in 2003 to approximately 5.8 million by 2020. Demand for student places in the five main English-language destination countries (Australia, Canada and New Zealand, the UK and the US) alone was predicted to rise from 1 million to 2.6 million in 2020 with students from Asia again accounting for the majority of this demand⁴. For the UK specifically, it was predicted that the demand for UK programmes delivered outside the country's borders (what The Observatory refers to as transnational higher education) would grow from an estimated 190,000 in 2003 to 350,000 in 2010 and 800,000 in 2020, thereby exceeding the demand for international student places in the UK⁵.

¹ According to the United Nations Educational, Scientific and Cultural Organisation (UNESCO), there were 2,455,250 students studying in a country other than their own in 2004. The Organisation for Economic Co-operation and Development (OECD) claims, however, that more than 2.7 million students were enrolled in higher education outside their country of citizenship in 2005, representing a 5% increase in the reported foreign student intake total. See UNESCO (2006) *Global Education Digest 2006*, Institute of Statistics (UIS), Montreal, Canada. URL: <http://www.uis.unesco.org/TEMPLATE/pdf/ged/2006/GED2006.pdf>. Last accessed 15 May 2007; and the OECD (2007) *Education at a Glance 2007: OECD Indicators*, Paris, France, p.299. URL: <http://www.oecd.org/dataoecd/4/55/39313286.pdf>. Last accessed 26 September 2007.

² In 1999, according to UNESCO, there were 1.68 million "internationally mobile students" students, a figure which refers to those students who have crossed a national border for the purposes of education, and who are enrolled outside their own country of origins. For more information, see UNESCO (2006) *Global Education Digest 2006*, UIS, Montreal, Canada, p 3. URL: <http://www.uis.unesco.org/TEMPLATE/pdf/ged/2006/GED2006.pdf>. Last accessed 15 May 2007.

³ Böhm, Anthony (2003) *Global Student Mobility 2025: Analysis of Global Competition and Market Share*, IDP Education Pty Ltd., November. URL: http://www.idp.com/aiec/pastpapers/2003Melb/wednesday/research/bohmweds11_p.pdf. Last accessed 15 May 2007.

⁴ British Council (2003) *Vision 2020: Forecasting International Student Mobility – A UK Perspective*, p. 4.

⁵ *Ibid*, p.8.

Although these projections even at the time might have been considered slightly optimistic, they indicate the anticipation found amongst most stakeholders that the international student market would continue to grow with ample opportunities for institutions to increase their numbers. However, developments over the past five to six years demonstrate both that overall predicted student numbers have not been as high as expected and that international student demand might not continue to focus on what have been the main destinations in the past. The US, the UK and Australia have all experienced either a decline in enrolments or a 'slump' in the growth experienced in previous years. Many European countries, which traditionally have maintained significant and stable recruitment numbers from a range of nations with which they share historical and linguistic connections have stepped up their marketing efforts. Meanwhile, new players in Asia and the Middle East have entered the market with declared ambitions to become regional education centres by attracting as many as several hundred thousand international students to their countries.

Several reasons for the changes in mobility patterns have been identified, including the post 9/11 international climate, the higher costs associated with overseas study, increased competition in the market and enhanced opportunities in the home countries of many students (due to significant investments in the expansion of domestic capacity and increased import of transnational provision)⁶. Chronic skills shortages are furthermore highlighting the importance of attracting international students, in terms of potential short- and long-term gains for institutions and countries. In the first instance, with public per student funding for higher education decreasing in many countries, it is important for institutions to diversify their generated income and the revenue earned from overseas student tuition has become one important way of doing so. In the long term, and perhaps more importantly, Western economies are actively seeking to retain international students after graduation, with their industrial sector increasingly interested in recruiting overseas talent to compensate for local skilled workforce shortages and to remain competitive in an era of globalisation. Indeed, in the wider socio-economic context, developed countries are looking to attract foreign skilled labour to supplement their rapidly decreasing and ageing populations. According to national immigration authorities, Australia will have 200,000 more jobs than people to fill them in five years' time. With one of the lowest birth rates in the OECD, Canada is expected to become increasingly reliant on skilled immigration to the country to boost the labour force. Close to 20% of current Canadian citizens were born abroad, an indication that the country is arguably already reliant on the skills the more than 130,000 international students who annually enrol there. For these reasons, concerns over enrolment trends have warranted the attention of national governments in countries such as the US and the UK, because not only do these countries want overseas students, they actually need them for economic development.

In light of developments in the international student market over the past years, therefore, there is a clear sense of concern amongst the traditional destination countries, even those which have only experienced marginal enrolment declines.

This report will examine current and emerging international student mobility trends and analyse how government policies can facilitate successful student recruitment activities. It is divided into two main sections. The first provides an overview of recent and current developments in the following countries:

- The Major Players: the United States, the United Kingdom and Australia;
- The Middle Powers: Germany and France;
- The Evolving Destinations: Japan, Canada and New Zealand; and
- The Emerging Contenders: Malaysia, Singapore and China.

⁶ Almanac of Higher Education 2004-5 (2005) 'Institutions enrolling the most foreign students', *The Nation*, *The Chronicle of Higher Education*. URL: <http://chronicle.com/weekly/almanac/2006/nation/0102002.htm>. Last accessed 15 May 2007.

The second section examines trends in international student recruitment strategies with a particular focus on developments likely to be increasingly important for institutions and countries:

- Visa Schemes and Immigration Procedures
- The Student Experience: Expectations and Motivations; and
- Costs associated with an Overseas Education

2 Methodology and Definitions

Widely variant definitions of 'international' or 'foreign' students in education systems across the world challenge the analysis of comparative mobility between countries. Terminology used in one country often has little or no equivalent in another, and for this reason, countries report enrolment statistics in different capacities as they relate to their own national contexts. To address existing discrepancies, in its most recent *Global Education Digest* (2006) UNESCO introduced the concept of 'internationally mobile students', individuals who leave their country or territory of origin and travel to another for the purpose of studying there. According to UNESCO, statistics about 'internationally mobile students' more accurately represent inbound and outbound student flows, as they consider more than the singular criterion of citizenship, which has traditionally been the defining indicator of 'foreign students'. By considering other criteria such as permanent residency and prior education in addition to citizenship, the concept of the 'internationally mobile student' eliminates potential misunderstandings resulting from different definitions between countries and facilitates a more comprehensive understanding of trends in worldwide mobility⁷.

Since the 2006 edition of *Education at a Glance*, the OECD has defined 'international students' as those who expressly cross borders with the intention to study. The OECD notes that citizenship, whilst a practical indicator for students who are not citizens of the country in which they study, conceivably distorts the number of non-citizens who are nonetheless permanent residents studying in what is effectively their home country⁸. Indeed, as much as 33% of the 'international students' in some European countries are long-term or permanent residents, and for this reason, it is often especially difficult to accurately determine mobility within the European Union⁹.

In recognition of country-specific immigration procedures and data availability constraints, together with UNESCO and Eurostat, the European Union's statistical information service, the OECD has thus devised such terminology to improve the measurement of mobility patterns. Yet because such organisations still rely on individual countries to voluntarily provide them with data concerning 'international students', and countries still differ in the criteria used to report student mobility (if they report it all), data presented in such reports do not necessarily provide information any more accurate than that released by national education agencies. For this report, therefore, included enrolment figures are based on data compiled by nationally-recognised education bodies as determined by official central government sources, acknowledging that these statistics are dependant on each country's terminology. A list of national definitions of 'foreign' or 'international' students' is included in Appendix A of this report.

⁷ UNESCO (2006) *Global Education Digest 2006*, UIS, Montreal, Canada, p. 33. URL: <http://www.uis.unesco.org/TEMPLATE/pdf/ged/2006/GED2006.pdf>. Last accessed 29 July 2007.

⁸ OECD (2006) *Education at a Glance 2006: OECD Indicators*, Paris, France, pp. 285-6. URL: http://www.oecd.org/document/52/0,3343,en_2649_34515_37328564_1_1_1_1,00.html. Last accessed 15 May 2007.

⁹ Kelo, M., Teichler, U., and B. Wachter (2006) *Eurodata: Student Mobility in European Higher Education*, Bonn, Germany, Lemmens Verlag & Mediengesellschaft.

3 Recent Trends and Development: International Student Mobility

The Major Players: United States, United Kingdom and Australia

For the past decade, international students have predominantly travelled to the United States (US), the United Kingdom (UK) or Australia for the purposes of higher education. With approximately 45% of the total amount of all foreign students, or roughly 1.2 out of the 2.7 million students studying abroad, these three countries rank first amongst the most popular destination countries for overseas studies. In terms of straight numbers, the US is the undisputed frontrunner with approximately 565,000 foreign enrolments in 2006, followed by the UK and Australia, respectively with 330,000 and 280,000 registered overseas students (please refer to Appendix B)¹⁰.

There are several reasons why the US, the UK and Australia are the key players in the international student market. Firstly, all of these English-speaking countries source significant amounts of students from a wide variety of countries throughout the world, and have consistently done so for many years. By successfully attracting tens of thousands of students from several different countries, each has managed to establish a diversified market with strong growth potential. Over time, certain markets have performed less well than others, but each of these host countries has maintained relatively steady numbers in a core stock of source countries. Secondly, all three have extremely high numbers of students from India and China, the world's two most prominent source countries. Indeed, the US, the UK and Australia have successfully managed to supply a massive demand for international education for students coming from both countries, especially in recent years. Moreover, each country could potentially record even higher numbers because the percentage of Indian and Chinese citizens seeking higher education provision is only predicted to grow in the coming years. Thirdly, education organisations in the US, the UK and Australia have developed impressive marketing strategies to target potential students. Not only can these three countries provide foreign students with the opportunity to study in English at internationally renowned facilities with 'world-class facilities', but the US and Australia often offer substantial financial incentives to do so. Quite significantly, they thus have the capacity to give considerably more to students than can other competitor countries, and this is a major reason why they manage to recruit more international students.

The US, the UK and Australia are the leaders in the international student market not just because they annually record the highest number of foreign students but also because they strategically target students in potentially high-yield countries. With a sound awareness of the contribution that foreign students make to host nation economies, both culturally and financially, these three countries seem to recognise how advantageous international higher education can be as an export service. Having already taking considerable steps towards internationalising their higher education systems, especially in recent years, each is currently implementing further initiatives to facilitate the arrival and integration of overseas students, including substantial amendments to immigration requirements and procedures. For these reasons, they are likely to remain the top host nations in an increasingly competitive market for the foreseeable future.

a. United States (US)

With an approximate 22% share of the international student market, the US hosts more international students than any other country in the world. In 2006 close to 565,000 foreign students from virtually every nation on earth travelled to the US for higher education, including more than 28,000 Canadian and close to 14,000 Mexican students. Asia has been a particularly strong source region, with 327,785 students from more than 30 different countries having decided to study in the US last year, a figure which accounts for 58% of the country's total 2006 international student intake. Of the 30-odd Asian nationalities which annually send students, the

¹⁰ It is important to note that some countries, such as Australia, combine enrolment statistics for the total number of foreign students enrolled in Australian programmes provided inside and outside of the country, whilst others, such as the UK, produce separate statistics for overseas students enrolled in UK transnational programmes. Such differences in statistical methodology explain why there may be considerable variation in the reported numbers of overseas students between countries. Please see Appendix A for national definitions of international students.

US has grown especially high-yield markets in India, China, Japan and South Korea. Over the past five years, these four countries have together represented around 70% of the per year regional total for Asia, and 40% of the total number of overseas students studying at US institutions.

Yet whilst the US dominates the market in terms of student numbers, and indeed has done for the past fifty years, the country has more recently witnessed a decline in several of its well-established markets, including Indonesia, Japan, Taiwan and Thailand. Moreover, amongst other leading destination countries, the US has experienced comparatively weak growth in international student enrolments overall. According to the American Council on Education (ACE), between 1999 and 2005, overseas enrolments to the US grew by nearly 17%, but by 29% in the UK, 42% in Australia, 46% in Germany and 81% in France over the same period¹¹. Indeed, given the higher education capacity of the US, with more than 4,000 accredited institutions, the largest amongst the main competitors in the international student market, international students account for less than 4% of total higher education enrolments¹².

The post-9/11 political climate is part of the reason for slowed growth in international student enrolments, not least because foreigners have reportedly found it increasingly difficult to gain student visas. Together with stricter requirements and conditions of entry, including personal interviews, students from countries around the world are subject to lengthy delays and limited information as to what is causing them¹³. In 2001, for example, the US State Department received 381,000 F-1 visas applications and rejected 23% of them, yet in 2002 US embassies refused 27% despite receiving 58,000 fewer applications¹⁴. In response, the US Government has recently undertaken several measures to make immigration procedures easier and more transparent, including legislative revisions to its visa-awarding policy and an increase in the number of consular officers in high-volume posts. It has also begun announcing strategic co-operation in higher education with particular countries, China, Morocco and Chile amongst them. As a result, US policy now seems to be oriented towards reversing the decline, not least by conveying that the country welcomes international students. According to the US Department of Education, whilst the number of F-1 multi-year visas granted for study in the US in 2006 (273,870) is still below the 2001 total (293,357), the number of student and exchange programme visas reached an all-time high of 591,050 last year¹⁵.

With 'world-class' institutions, quality provision and high 'brand' visibility in the international market, US higher education has been seen as a worthy investment, and an investment it most certainly is, with the most costly higher education fees in the world. Thus far, the reputable quality of US higher education and the financial return of student investment in it seem to have been enough to keep the US competitive, but with more affordable provision and progressive residency policies being implemented in other countries it should no longer necessarily rely on recruitment from well-established markets. Rather, according to recommendations from the US Department of Education's Commission for the Future of Higher Education, in light of initiatives by other governments, it should ease permanent residency requirements for highly-skilled international graduates so as to entice them to choose to study at US institutions¹⁶. Should the Government decide to do so, and in light of its other already numerous advantages, the US is likely to remain the world's pre-eminent higher education destination.

¹¹ American Council on Education (ACE) (2006) *Students on the Move: The Future of International Students in the United States*, October. URL: <http://www.acenet.edu/AM/Template.cfm?Section=InfoCenter&CONTENTID=18573&TEMPLATE=/CM/ContentDisplay.cfm>. Last accessed 1 May 2007.

¹² Institute of International Education (2006), 'How are nations responding to student mobility?', presentation at the British Council's Going Global 2 Conference, December.

¹³ 'Foreign students find it a difficult year to win the State Department's favour', *The Chronicle of Higher Education*, 15 November 2002. URL: <http://chronicle.com/weekly/v49/i12/12a04001.htm>. Last accessed 31 July 2007.


¹⁴ 'Tougher U.S. visa rules keep foreign students away', *The Atlanta-Journal Constitution*, 13 August 2003. URL: http://www.ajc.com/news/content/news/atlanta_world/0803/13mba.html. Last accessed 31 July 2007.

¹⁵ 'US woos Latin American students after post-9/11 decline', *CNN*, 21 August 2007. URL: <http://edition.cnn.com/2007/WORLD/americas/08/21/study.abroad.ap/index.html>. Last accessed 3 September 2007.

¹⁶ US Department of Education (2006) *A Test of Leadership: Charting the Future of US Higher Education*, September. URL: <http://www.ed.gov/about/bdscomm/list/hiedfuture/reports/final-report.pdf> Last accessed 1 May 2007.

Table 1: The US' top ten source countries 1997-2006¹⁷

Country	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Canada	22,984	22,051	22,746	23,544	25,279	26,514	26,513	27,017	28,140	28,202
China	42,503	46,958	51,001	54,466	59,939	63,211	64,757	61,765	62,523	62,582
Germany	8,990	9,309	9,568	9,800	10,128	9,613	9,302	8,745	8,640	8,829
India	30,641	33,818	37,482	42,337	54,664	66,836	74,603	79,736	80,466	76,503
Indonesia	12,461	13,282	12,142	11,300	11,625	11,614	10,432	8,880	7,760	7,575
Japan	46,292	47,073	46,406	46,872	46,497	46,810	45,960	40,835	42,215	38,712
Malaysia	14,527	14,597	11,557	9,074	7,795	7,395	6,595	6,483	6,142	5,515
Mexico	8,975	9,559	9,641	10,607	10,670	12,518	12,801	13,329	13,063	13,931
South Korea	37,130	42,890	39,199	41,191	45,685	49,046	51,519	52,484	53,358	58,847
Taiwan	30,487	30,855	31,043	29,234	28,566	28,930	28,017	26,178	25,914	27,876
Thailand	13,481	15,090	12,489	10,983	11,187	11,606	9,982	8,937	8,637	8,765
Turkey	8,124	9,081	9,377	10,100	10,983	12,091	11,601	11,398	12,474	11,622

 Shaded figures indicate country was outside top ten for indicated year

b. United Kingdom (UK)

On the basis of per year enrolments, the UK is the second most popular higher education destination for overseas students, with a 12% share of the international student market. In the 2005-6 academic year more than 330,000 international students registered at UK institutions, with the countries of France, Germany, Greece, Ireland, Italy and Spain having sent consistently high number of students over the past decade. On average, the UK has annually sourced approximately 64,200 students from these four countries. Yet whilst they have accounted for as much as 30% of the total number of foreign enrolments, with the development of new markets in recent years, they now share just over 18% of the UK's total overseas student intake. In particular, the UK has experienced exponential growth in the Chinese, Indian and Nigerian markets. Less than ten years ago, students from these countries collectively numbered only a few thousand, and represented only 3.4% of total foreign enrolments. Yet according to the most recent statistics from the UK's Higher Education Statistics Agency, in 2005-6, there were 50,755 Chinese students, 19,205 Indian and 9,605 Nigerian nationals studying in the UK, representing more than 24% of the country's total number of foreign students¹⁸.

Foreign students account for more than 13% of the UK's total number of enrolments, a comparatively high percentage. Yet whilst the UK has experienced strong growth in several Asian and African markets, it has witnessed falling numbers from a few of its previously most consistently performing source countries. Over the past ten years, the number of Malaysian students, for example, has declined by more than 36% from 18,015 to 11,450 students, with Greece and Singapore likewise sending substantially fewer students in recent years. Between the 1999-2000 and 2004-5 academic years, UK enrolments grew by around 30%, a figure that, whilst still significant, is comparatively less impressive to the growth experienced by competitor higher education destinations such as Australia, Germany and France during the same time period¹⁹.

Targeted recruitment initiatives by competitor nations at least partially explain stagnant or declining numbers to the UK, especially in the case of Malaysia. Over the last few years, Australia, for example, has increased efforts to attract students from specific countries in Asia by organising national recruitment events and revising immigration legislation for overseas students. Indeed, at a time when the UK is hosting decreased numbers of Malaysians and the US fewer Taiwanese and Thai students, Australia is reporting growth, however limited, in these same countries. In addition, the governments of some of these targeted countries, Malaysia and Singapore in particular, have

¹⁷ Alphabetically listed.

¹⁸ Higher Education Statistics Agency Limited (HESA) (2007) *Students in Higher Education Institutions: 2005-6*, March.

¹⁹ ACE (2006) *Students on the Move: The Future of International Students in the United States*, October. URL: <http://www.acenet.edu/AM/Template.cfm?Section=InfoCenter&CONTENTID=18573&TEMPLATE=/CM/ContentDisplay.cfm>. Last accessed 1 May 2007.

developed strategies to transform their countries into 'world-class' higher education destinations over the next decade.

Internationally, UK qualifications are highly regarded and highly recognised, yet many overseas students seem to believe that a US degree is a better investment. In the US, where annual tuition fees can reach US\$38,000 per year at 'top' institutions, students could save as much as US\$10,000 by enrolling in a programme for a similar degree at a British institution. Importantly, however, whilst UK tuition fees are comparatively low, this financial advantage disappears after taking into consideration the high living costs in many parts of the UK. According to the Council for International Education (UKCOSA), together with the perception that future earnings may be better with a US degree in hand, the high cost of living is a major reason why foreign students choose to go elsewhere²⁰. With the launch of the second part of the Prime Minister's Initiative (PMI 2)²¹ in 2006 and the recently introduced International Graduate Scheme²², the UK is going to great lengths to convince them otherwise, but should fees continue to rise, it may have an increasingly difficult time doing so.

Table 2: The UK's top ten source countries 1997-2006²³

Country	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
China	2,660	2,883	4,017	6,310	12,095	20,710	35,155	47,740	52,675	50,755
France	12,101	12,844	13,254	12,910	9,950	9,940	10,560	11,295	11,685	12,455
Germany	12,582	13,037	13,568	13,750	11,370	10,960	11,785	12,095	12,555	13,265
Greece	21,737	25,602	28,605	29,580	31,150	28,585	26,005	22,825	19,685	17,675
Hong Kong	7,767	7,977	8,829	8,380	8,335	8,870	10,105	10,575	10,780	9,455
India	2,302	2,965	3,498	3,760	4,875	7,750	12,465	14,625	16,885	19,205
Ireland	15,572	15,894	15,144	13,930	13,510	13,235	13,460	14,715	16,345	16,790
Italy	4,990	5,254	5,748	6,080	5,415	5,170	5,440	5,215	5,315	5,460
Japan	4,665	5,332	5,686	6,150	6,470	6,355	6,300	6,395	6,180	6,200
Malaysia	18,015	17,380	12,632	10,140	10,005	10,680	11,780	11,805	11,475	11,450
Nigeria	1,834	1,920	1,902	2,120	2,650	3,340	4,585	5,940	8,145	9,605
Singapore	5,646	6,081	6,016	5,460	4,410	4,175	4,250	3,905	3,630	3,275
Spain	6,945	7,220	7,660	7,780	5,860	5,705	6,095	6,105	6,000	6,225
US	9,448	10,117	10,981	11,470	9,425	9,985	11,630	13,380	14,385	14,755

 Shaded figures indicate country was outside top ten for indicated year

²⁰ According to research undertaken by JWT Education, whilst many foreign students perceive UK higher education to be 'better' quality, they ultimately choose to study in the US because many institutions there have industrial partnerships in place which provide numerous prospects for future employment; JWT Education, 'Promoting what we've got – encouraging people to study in the UK', presentation at the 4th Annual International Student Conference, March 2007. Also see The Council for International Education (UKCOSA) (2006) *New Horizons: The Experiences of International Students in UK Further Education Colleges – Report of the UKCOSA Survey*, November; and UKCOSA (2004) *International Students in UK Universities and Colleges: Broadening Our Horizons*, October.

²¹ The first phase of the Prime Minister's Initiative on International Education (PMI) was announced in 1999 to increase the number of (especially non-EU) international students studying in the UK by 75,000 by 2005 and to promote UK education abroad. The second phase of the PMI was launched in April 2006 and aims to attract an additional 100,000 foreign students to pursue higher education studies in the UK and to encourage partnerships between British and overseas institutions. For more information, see the Department for Children, Schools and Families (2006) 'Prime Minister launches strategy to make UK leader in international education', 18 April, URL: http://www.dfes.gov.uk/pns/DisplayPN.cgi?pn_id=2006_0058. Last accessed 5 May 2007.

²² The International Graduate Scheme (IGS) allows students from beyond the European Economic Area (EEA) to work in the UK for up to one year after completing an undergraduate, Master's or doctoral degree or a postgraduate diploma or certificate at a UK institution. For more information, see 'International Graduates Scheme', Workpermit.com. URL: http://www.workpermit.com/uk/international_graduates_scheme.htm?newsletter. Last accessed 5 May 2007.

²³ Alphabetically listed.

c. Australia

Australia owns approximately 11% of the international student market, with 281,633 predominantly Asian students having registered at higher and vocational institutions in the 2005-6 academic year²⁴. With overseas students currently accounting for close to 18% of the total number of students registered in Australian higher education, the country has arguably become the most successful exporter of higher education. Over the past decade, overseas higher and vocational education enrolments have increased by more than 280%, from 100,383 in 1997 to 281,633 in 2006, with the country having rapidly grown markets in China and India. In 1997, 5,690 Indian nationals registered in Australian institutions, representing less than 6% of total enrolments. In 2006, Indian students accounted for close to 13% of Australia's total foreign enrolments. The country's share of the Chinese market has likewise grown exponentially. Over the past ten years, the number of Chinese nationals studying at onshore and offshore Australian higher and vocational education institutions has increased from 3,828 to 63,543 students, close to 1,660%²⁵.

Australia has also become an increasingly popular destination for Brazilian and US students, with similar patterns of steady growth having occurred in the past ten academic years. Yet whilst Australia has experienced extraordinary growth in a very short period of time, recent figures suggest the 'enrolment boom' is slowing, especially in certain markets. Historically, Australia has attracted high numbers of students from Southeast Asia, particularly Hong Kong, Indonesia and Singapore, but the number of students from these countries has decreased over the past five years, not least in the case of Singapore. Between 1997 and 2001, Singaporean enrolments at Australian institutions increased by close to 59%, from 14,308 to 22,725 students. Since 2001, however, there has been negative growth of nearly 61%, as Australia's intake has decreased to 8,906 students. According to Australia Education International, in addition to Singapore, Australia also experienced enrolment declines in Indonesia (-6.7%), Japan (-6.6%) and Hong Kong (-3.8%) between 2005 and 2006, contributing to slower growth than in previous years²⁶.

With Australia's comparatively well-priced highly developed education system, individual institutions actively market the benefits of an Australian higher education to an overseas market, as does IDP Education Pty Ltd. (IDP), the country's leading recruitment company. By hosting Australian education fairs abroad and providing newly-arrived international students with orientation services, IDP is representative of the effort Australia has invested in the recruitment of international students to its shores. Over the past few years, Australia has consequently done better than most countries in implementing initiatives to grow markets in foreign nations, but any country would find it a challenge to maintain such rapid growth over a longer period of time. Indeed, with the world's highest international-to-domestic student ratio, and well over 250,000 foreign students studying in a country whose population is less than 20 million, international students potentially already saturate Australia's higher education capacity. For this reason, further growth may only occur should the country manage to lure students away from competitor destinations.

With traditional source countries such as Malaysia and Singapore aiming to attract hundreds of thousands of overseas students themselves, and other nations likewise developing targeted recruitment strategies, including China, the international student market is becoming increasingly

²⁴ According to the Australia's Department for Education, Science and Training (DEST), there were 383,818 full fee-paying foreign students in Australia in 2006. Of these, 172,297 enrolled in higher education institutions and 83,685 in vocational education institutions, for a total tertiary enrolment figure of 255,982 students. The data include the number of foreign students in English-language courses (English-language Intensive Courses for Overseas Students - ELICOS), but they do not cover offshore activity where Australian providers supply education services to foreign students overseas or by distance education where the student remains offshore. For more information, see the DEST website. URL: http://aei.dest.gov.au/AEI/MIP/Statistics/StudentEnrolmentAndVisaStatistics/2006/2006Annual_Stats.htm#2006. Last accessed 5 May 2007.

²⁵ DEST (2007) *Year 2006 Market Indicator Data*, Australian Education International (AEI), January, URL: http://aei.dest.gov.au/AEI/MIP/Statistics/StudentEnrolmentAndVisaStatistics/2006/2006_TableA_pdf.pdf. Last accessed 3 May 2007.

²⁶ DEST (2006) *2006 Annual International Student Statistics*, AEI, December, URL: http://aei.dest.gov.au/AEI/MIP/Statistics/StudentEnrolmentAndVisaStatistics/2006/2006_TableA_pdf.pdf. Last accessed 3 May 2007.

competitive. Should the country's traditional source markets experience considerable decline, evidence of which is already happening in several South East Asian nations, the country's institutions will face substantial economic pressure. Moreover, stumbling markets could significantly impact Australia's financial well-being, because as the country's fourth largest service export, education has contributed as much as US\$8.12 billion per year to the economy²⁷.

An English-speaking country with solid quality assurance mechanisms and established marketing techniques, Australia has thus far proven competitive in the marketplace. The country's natural advantages, namely a sunny climate and geographical proximity to developing countries overseas, are added draws, but with the costs of education rising Australia is becoming more and more vulnerable to changing market demand.

Table 3: Australia's top ten source countries 1997-2006²⁸

Country	1997*	1998*	1999	2000	2001	2002	2003	2004	2005	2006
Brazil	1,023	1,073	280	458	1,027	1,704	1,793	2,097	2,869	4,081
China	3,828	5,273	4,633	6,191	11,640	23,332	31,255	41,562	54,274	63,543
Hong Kong	17,236	18,161	16,205	17,888	21,753	16,131	18,159	18,175	17,196	16,558
India	5,690	8,073	9,420	10,399	10,316	11,271	13,920	19,587	26,303	36,078
Indonesia	18,394	17,715	12,650	13,484	15,822	17,632	17,092	15,405	13,830	13,025
Japan	11,817	10,739	3,984	4,169	5,438	7,509	8,495	9,131	9,352	9,110
Malaysia	16,257	16,485	15,767	18,868	19,385	16,431	18,554	18,819	18,262	18,074
Singapore	14,308	16,509	18,742	20,405	22,725	11,639	11,384	10,368	9,460	8,906
South Korea	18,312	11,184	4,287	4,534	6,719	8,904	8,889	9,138	10,506	12,352
Taiwan	7,492	6,403	2,985	3,235	3,967	5,698	6,051	5,996	5,683	5,614
Thailand	7,395	6,299	3,756	4,228	5,793	11,602	10,279	10,289	10,408	10,934
US	1,660	2,087	2,533	3,319	4,629	10,864	11,985	12,463	12,277	11,901

Shaded figures indicate country was outside top ten for indicated year

* Figures available for this year include the total number of foreign students, including school and English-language (ELICOS) students

The Middle Powers: Germany and France

With approximately 20% of world's foreign students, or 515,000 out of the 2.7 million students studying outside their home countries, Germany and France are best understood as secondary higher education destinations (see Appendix B). In 2006, both countries welcomed an average of 257,000 foreign students, and, together with the UK, annually enrol a very large majority of the total number of international students in Europe. According to UNESCO, three out of every five foreign students studying in Europe choose to attend an institution in the UK, Germany or France, making these countries the dominant regional leaders²⁹.

In regards to international student numbers, Germany and France compare favourably with other countries, but in contrast to the US, the UK and Australia they tend to attract students from regional European nations or those with socio-cultural or historical ties. In addition, both have managed to attract large numbers of students from China, one of the world's two most promising markets (India being the other), not least because of the extremely good value provision on offer at institutions in each country. The limited tuition fees for which overseas students are financially responsible certainly play to their favour, and within recent years, there have been dramatic increases in the proportion of Chinese students travelling to each for the purposes of higher education,

²⁷ According to IDP Education Pty Ltd., education contributed AUD\$9.8 billion (US\$8.4 billion) to the economy up to June 2006.

²⁸ Alphabetically listed. According to AEI, data for the periods 1994–2001 and 2002–6 are not comparable due to the different statistical methodology used to compile the data. For more information, please see the following: DEST (2007) *2006 Annual International Student Statistics*, AEI, December, URL: http://aei.dest.gov.au/AEI/MIP/Statistics/StudentEnrolmentAndVisaStatistics/2006/2006Annual_Stats.htm

²⁹ UNESCO (2005) *Tertiary Students Abroad: Learning without Borders*, UIS, Montreal, Canada, November, URL: http://www.unesco.org/education/factsheet_foreignstudents.pdf. Last accessed 15 March 2007.

especially to Germany. Yet whilst both have implemented strategic initiatives to seek students in new markets, the Middle East in the case of Germany, and Asia for France, they have not targeted key emerging markets as successfully as have the leading countries. Indeed, their low tuition fee rates may be a disadvantage in this respect, resulting in limited tuition fee revenue with which to finance marketing and recruitment. As a result, and perhaps most conspicuously, both countries attract relatively few Indian students in comparison to the US, the UK and Australia, and their failure to grow the Indian market is perhaps one of the reasons why they have remained behind the key players to date.

In strategic terms, therefore, because they seem to influence student mobility trends to a lesser degree than the major players, Germany and France are the international student market's middle powers. With some international influence in student mobility trends, and a not inconsequential percentage of the total number of the world's overseas students, they consistently perform well without threatening the leadership of the US, the UK and Australia. On the strength of their quality institutions and affordable provision, these countries are able to rely on numbers from their traditional markets. Importantly, and presumably in an attempt to attract more students, individual institutions have begun to introduce English as a medium of instruction, with approximately 300 such postgraduate programmes now running in Germany and more than 100 in France. Given the rapid growth in demand for English-language provision throughout the higher education world, not least in Asia, these programmes might be understood as a calculated risk. For the moment, Germany and France will remain regional rather than world powers with relatively good numbers of foreign students, but with conservative recruitment efforts unlikely to radically impact new markets.

d. Germany

Over the past decade, Germany has steadily increased its share of the international student market to 10%, placing it behind only the US and the UK in terms of foreign student numbers. As a percentage of total university enrolments, foreign students now account for 12.5% of Germany's close to two million strong student population, an increase of just over 4% since 1997³⁰. In 2006, more than 248,000 overseas students enrolled at German institutions, with Austria, France, Greece and Italy having consistently sent a combined average of more than 26,000 students to the country each year. Indeed, Europe is Germany's predominant source region, and the country has also proven a popular destination for Bulgarian, Polish and Russian students. The number of Bulgarian students, for example, has increased by almost 900%, from 1,434 to 12,794 students between the 1997 and 2006 academic years. Beyond Europe, Chinese enrolments have nearly doubled over the past five years, with more than 27,000 students having travelled to Germany for higher education in 2006.

After China, it is Turkey which annually provides the highest number of overseas students to Germany. Over the past few years, more than 23,400 Turkish students have enrolled at German institutions per year on average, with numbers having peaked at 24,448 in the 2003-4 academic year. Yet whilst Germany sources a high number of students from Turkey, the large majority of them are what the Government classifies as 'non-mobile' foreign students, or permanent German residents in possession of secondary school credentials earned in the country³¹. A more accurate measure for comparative purposes is the number of foreign students Germany attracts from the world's leading source countries³², and in this respect, Germany falls behind other leading

³⁰ Federal Ministry of Education and Research (BMBF) (2005) *Internationalization of Higher Education*, Bonn, Germany, p. 19. URL: http://www.bmbf.de/pub/internationalization_of_higher_education_2005.pdf. Last accessed 28 July 2007.

³¹ According to the BMBF, the terminology Germany uses to compile international student statistics is unique and has no equivalent in most other countries. For more information, see Appendix A and BMBF (2005) *Internationalization of Higher Education*, Bonn, Germany, p. 9. URL: http://www.bmbf.de/pub/internationalization_of_higher_education_2005.pdf. Last accessed 11 May 2007; and Leidel, M. (2004) 'Statistische Erfassung der Mobilität von Studierenden' in *Statistisches Bundesamt: Wirtschaft und Statistik*, Kern & Birner, Frankfurt, Germany, November, p. 1167.

³² The BMBF argues that because one of the largest groups of foreigners is made up primarily of permanent residents, "it is therefore more useful to examine how many foreign students from the world's leading countries of origin come to Germany" "in order to assess Germany's role on the global education market". See BMBF (2005) *Internationalization of Higher Education*, Bonn, Germany. URL: http://www.bmbf.de/pub/internationalization_of_higher_education_2005.pdf. Last accessed 11 May 2007.


destinations such as the US, the UK and Australia. In 2006, whilst the US attracted 76,500 students from India, fewer than 4,000 Indian students travelled to Germany for higher education. From South Korea, a country which sends the world's third highest amount of students overseas, whilst Australia welcomed more than 12,300 students in 2006, Germany enrolled just over 5,000 students.

In comparison to other countries, Germany has experienced very good market growth, as international enrolments have increased by more than 62% since 1997, but it has managed to establish itself in only one of the world's most high-yield countries, namely China. Moreover, whilst Germany has successfully grown a Chinese market, it has failed to do so to the same extent as have the UK and Australia, both of which have witnessed exponential growth over a very short period of time. Unlike other countries, Germany reports very little negative growth, as most of its markets continue to consistently perform well. Yet because the overwhelmingly majority of its students presently come from countries which send comparatively few numbers of students abroad, such as Cameroon and Ukraine, Germany is likely to report unremarkable growth, at least in the immediate future.

Germany certainly has incentives for international students, with high quality and well-priced provision increasingly administered in English. Interestingly, however, and to its advantage, it potentially stands to benefit from being a secondarily popular destination, for it is unlikely to miss students from countries with declining study-abroad rates such as Singapore, Malaysia and Hong Kong is it not accustomed to having in the first place.

Table 4: Germany's top ten source countries 1997-2006³³

Country	1997	1998*	1999*	2000	2001	2002	2003	2004	2005	2006
Austria	6,187	3,377	3,557	6,106	6,127	6,422	6,389	6,373	5,770	5,930
Bulgaria	1,434	1,541	2,022	3,307	5,015	7,321	9,897	12,048	12,848	12,794
Cameroon	1,900	2,164	2,851	3,638	4,141	4,464	4,896	5,332	5,393	5,521
China	4,980	4,773	5,054	6,256	9,109	14,070	20,141	25,284	27,129	27,390
France	5,894	5,410	5,449	6,204	6,246	6,356	6,245	6,431	6,290	6,074
Greece	7,945	4,125	3,870	7,708	7,516	7,451	7,254	7,043	6,115	5,850
Italy	5,784	3,203	3,376	6,547	6,771	6,879	7,074	7,183	6,810	6,701
Morocco	4,606	4,109	4,376	5,699	6,204	6,765	7,421	8,097	8,019	8,213
Poland	5,271	5,020	5,805	8,181	9,328	10,936	12,601	14,350	14,896	15,183
Russia	3,622	3,761	4,280	5,946	6,987	8,383	9,601	10,814	11,479	11,953
Turkey	21,856	6,414	6,306	23,762	23,640	24,041	24,114	24,448	22,553	22,419
Ukraine	1,145	1,407	1,841	2,836	3,688	4,917	6,071	7,238	8,066	8,671

 Shaded figures indicate country was outside top ten for indicated year

* Figures available for this year include the number of 'mobile' foreign students only

e. France

France is just behind Germany with a little less than a 10% share of the global student market and an average of 201,100 international student enrolments per year over the past decade. Since 1999, the number of overseas nationals enrolling in French higher education institutions has increased by more than 75%, from 151,000 to more than 265,000 students in 2006. With the number of total enrolments nearing 2.3 million, foreign students represent 11.6% of France's entire higher education population³⁴. The large majority of students come from Algeria, Morocco, Tunisia

³³ Alphabetically listed.

³⁴ Ministry of Education (2007) *Les effectifs étudiants dans le supérieur en 2005*, January, p. 1, URL: <http://media.education.gouv.fr/file/25/7/4257.pdf>. Last accessed 11 May 2007; Ministry of Education (2006) *Les effectifs étudiants*, September, URL: <http://media.education.gouv.fr/file/85/9/2859.pdf>. Last accessed 11 May 2007; and Ministry of Education (2006) *Repères et références statistiques – Édition 2006*, URL: <http://media.education.gouv.fr/file/42/6/2426.pdf>. Last accessed 27 July 2007.

and Senegal, with the Algerian market in particular having steadily grown in the past few years³⁵. Between 2002 and 2006, for example, the number of Algerian enrolments increased by more than 58%, whereas the Moroccan market has actually decreased by more than 12.7% since 2005. In considerable contrast to other destinations, with even Chinese enrolments numbering less than 16,000, France sources relatively few students from Asian nations.

With a number of internationally recognised institutions and inexpensive tuition fees, France does attract students from Germany, Italy and Poland, but enrolments number only a few thousand, and have done for the past few years. For this reason, the European markets, whilst reliable, show very little potential for growth. Moreover, because the majority of France's international students come from former colonies and countries with substantial immigrant populations in France itself, the country's competitive position in the global student market is potentially misleading. Unlike the leading destination countries, all of which attract substantial numbers of students from India, China and South Korea, the world's three highest 'sending' countries, France registers more students from Africa than from any other region. In 2006, whereas the US, the UK and Australia each sourced the overwhelming majority of their students from Asia, in France, Africa accounted for 50% of the 209,523 registered foreign student university enrolments, followed by Europe (23%), Asia (around 20%) and North and South America (less than 7%)³⁶.

Language at least partially explains why France receives such high numbers of students from Africa, and comparatively low ones from Asia. With a shared language, historical ties and higher education systems largely modelled on those in France, countries such as Morocco, Tunisia and Senegal are strong sources of international students for France. This also explains why France is popular amongst students from Vietnam, a former French colony, one of Asia's only French-speaking nations and the only one (besides China) where France seems to have relatively high 'brand' visibility. Linguistic ties also account for the several thousand students that Lebanon and Syria send to France each year, and clarify why more English-speaking countries such as Malaysia, Hong Kong and Singapore do not do likewise.


On the basis of international per year enrolments, France is an attractive destination for higher education, not least because of the perceived value for money and the excellent reputation of many of its institutions. Moreover, now that some institutions are moving towards English-language provision for particular courses, France could become an even more competitive host country in the coming years. Given that France already owns most of the French-speaking market, student numbers from these sources are unlikely to increase dramatically. Should the country implement further initiatives aimed at recruiting more English-speaking students, however, and in particular, English-speaking students from Asia, France stands to become a more influential player in the global market.

³⁵ Ministry of Education (2004) *Les étudiants étrangers en France*, June, pp. 30-2. URL: <http://media.education.gouv.fr/file/56/5/2565.pdf>. Last accessed 31 July 2007.

³⁶ Ministry of Education (2007) *Les effectifs étudiants dans le supérieur en 2005*, January, p. 3, URL: <http://media.education.gouv.fr/file/25/7/4257.pdf>; Ministry of Education (2006) *Les effectifs de l'enseignement supérieur de 1990-1 à 2005-6*, July, pp. 21-2. URL: <http://media.education.gouv.fr/file/32/3/4323.pdf>; and Ministry of Education (2006) *Repères et références statistiques – Édition 2006*, URL: <http://media.education.gouv.fr/file/42/6/2426.pdf>. All last accessed 27 July 2007.

Table 5: France's top ten source countries 1997-2006³⁷

Country	1997*	1998*	1999	2000	2001	2002	2003	2004	2005	2006**
Algeria	N/A	N/A	13,427	12,535	12,005	13,602	17,065	21,672	21,552	N/YA
Cameroon	N/A	N/A	3,245	3,279	3,389	3,666	4,031	4,552	4,958	N/YA
China	N/A	N/A	1,374	2,111	3,452	5,535	8,774	11,908	15,963	N/YA
Germany	N/A	N/A	5,174	5,436	5,395	5,412	5,892	6,521	6,422	N/YA
Italy	N/A	N/A	3,661	3,847	3,657	3,781	4,095	4,452	4,163	N/YA
Lebanon	N/A	N/A	2,457	2,500	2,817	3,233	3,871	4,493	4,529	N/YA
Morocco	N/A	N/A	16,030	17,899	21,343	26,076	28,563	29,044	25,782	N/YA
Romania	N/A	N/A	1,973	2,271	2,861	3,255	3,466	4,419	4,442	N/YA
Senegal	N/A	N/A	3,548	4,079	5,147	6,166	7,324	8,020	9,019	N/YA
Tunisia	N/A	N/A	5,079	5,675	6,346	7,251	8,253	9,130	9,593	N/YA
US	N/A	N/A	2,399	2,515	2,578	2,624	2,612	2,700	2,605	N/YA
Vietnam	N/A	N/A	1,151	1,226	1,479	1,602	2,221	2,877	4,331	N/YA

 Shaded figures indicate country was outside top ten for indicated year

* Figures not available (N/A) for this year

** Figures not yet available (N/YA) for this year

The Evolving Destinations: Japan, Canada and New Zealand

Japan, Canada and New Zealand together share roughly 13% of the international student market, with approximately 327,000 of the 2.7 million students who travel abroad for the purposes of higher education (refer to Appendix B). According to Canadian higher education organisations, at one point as many as 130,000 foreign students enrolled in the country's institutions in a single year, with Japan and New Zealand having each recorded peak numbers of around 120,000 students. In recent years, however, each country has experienced declining international enrolments, and has become a less significant destination for transnational higher education.

With 'peak and decline' patterns of international student enrolments, Japan, Canada and New Zealand each attract between 75,000 and 115,000 overseas students per year, a not insignificant number. For the most part, however, because they overwhelmingly rely on one or two countries to provide the very large majority of these students, their overseas student numbers are contingent on continued recruitment in well-established markets focused on Asia. In 2006, for example, Chinese students accounted for more than 74,000 (63%) of Japan's roughly 117,000 international students, with the next nine top source countries together sending just over 32,000 students. In past years, whilst all three countries have expanded their numbers in key countries, they have continued to depend on familiar markets, making them potentially vulnerable to declines in outgoing student mobility within them and less secure in terms of their overall competitiveness in international recruitment. Yet even as total international enrolments are on the decline, rather than developing more 'adventurous' strategies to pursue new markets, all three seem to be concentrating their marketing activities towards the protection of already established ones.

Japan, Canada and New Zealand are thus the international student market's evolving destinations, attracting significant numbers of foreign students but operating in the 'shadow' of their more visible regional neighbours, China, the US and Australia respectively. In recent years, presumably spurred by declining international enrolments, the governments of each of these countries has highlighted the value of higher education as an export service, yet to date none has developed an action strategy to more successfully market their advantages, including well-regarded institutions, safe environments and a reasonable cost of living, as higher education host nations. Until they do so, these countries will remain less popular destinations amongst overseas students and fail to seriously challenge the competitive position of the leading destination nations.

³⁷ Alphabetically listed.

f. Japan

Japan owns close to 5% of the global student market, with nearly 118,000 overseas students having enrolled in Japanese higher education institutions in 2006. In the past ten years, the number of overseas students travelling to the country has increased by close to 231%, from 51,000 to roughly 118,000 students. Asian nations overwhelmingly provide Japan with most of its overseas enrolments, and they have done for several years. Indonesia, Malaysia, the Philippines and Taiwan have proven Japan's most consistent source countries, with per year student numbers changing very little over the years. In 1997, for example, 2,128 Malaysian students were recorded to have registered at Japanese higher education institutions, with 2,156 in 2006. In other words, the Malaysian market has remained virtually unchanged in the past decade, as have the Indonesian and Taiwanese markets. In the past two years, however, Japan has witnessed a 3.3% decrease in total overseas enrolments, and whilst the country has attracted as many as 122,000 students in the past, falling numbers from China, its key market, suggest further decline.

Since 1997, on average, Chinese students have accounted for 59% of Japan's total foreign enrolments, as much as 66% in particular years. In 2005, Japan's highest foreign enrolment year to date, China contributed more than 80,500 of 122,000 overseas enrolments (more than 66%), with South Korea, Japan's second highest source country, contributing a further 15,600 (roughly 13%). Once Chinese numbers began to fall, as they did by 6,300 students from 2005 to 2006, representing a 7.8% drop, so too did total enrolments. Increasing numbers of students from the US and Mongolia are going to Japan, but to date, not enough to mitigate the effect of decreasing enrolments from China. In 2006, overall enrolments declined by 3.2%.

One reason for the decreasing number of Chinese students enrolling in Japanese institutions is that over the last couple of years, China has committed substantial resources towards the development of its own higher education system at least partly to convince Chinese students to stay home³⁸. On the other hand, according to the country's Ministry of Education, a record 134,000 Chinese students travelled abroad for higher education in 2006, an increase of roughly 13% on the year before³⁹. Significantly, these figures suggest that whilst Chinese students are still going overseas, they are no longer going to the same destinations. With overseas diplomas no longer necessarily guaranteeing employment for returning graduates as they once did, Chinese students seem to be more selectively choosing destination countries. Whilst Japan offers higher quality and more affordable provision than do some competitor nations, Chinese students are increasingly looking outside of Asia for their education.

Japan has one of the highest tertiary education participation rates in the world, and partly as a result of high domestic enrolments levels, foreign students only represent roughly 3% of the its total number of university and college students. In an effort to increase foreign enrolments and prevent further decline, the Government has tasked an Education Rebuilding Council subcommittee with internationalising higher education. In April 2007, the subcommittee reportedly made recommendations designed to attract one million foreign students to Japan by 2025, including more English-language provision, more flexible credit-transfer systems and more funding for foreign scholars⁴⁰. Whilst one million more students might be too ambitious a target, the Government has recognised the need to implement substantial reform should Japan wish to remain competitive in the global education market, much to its credit. In light of China's growing influence, and an increasingly crowded Asian marketplace, it arguably has little choice but to do so.


³⁸ Several factors have contributed to a decline in the number of Chinese students going to Japan. Amongst the more effective measures is the Beijing government's policy of encouraging students to remain at home for studies by offering a number of incentives, including the establishment of new campuses and significant tax breaks. 'British universities worry as Chinese enrolments plummet', *The Chronicle of Higher Education*, 20 October 2005. URL: <http://chronicle.com/daily/2005/10/2005102005n.htm>. Last accessed 15 May 2007.

³⁹ 'Ninety percent of Chinese students overseas have to stump up for their education', *People's Daily Online*, 6 March 2007. URL: http://english.people.com.cn/200703/06/eng20070306_354868.html. Last accessed 15 May 2007.

⁴⁰ 'Panel OK's plan to attract 1 million foreign students by '25'', *The Daily Yomiuri*, 19 April 2007. URL: <http://www.yomiuri.co.jp/dy/national/20070419TDY03011.htm>. Last accessed 16 May 2007.

Table 6: Japan's top ten source countries 1997-2006⁴¹

Country	1997*	1998*	1999*	2000*	2001*	2002*	2003	2004	2005	2006
Bangladesh	732	750	806	800	805	823	974	1,126	1,331	1,456
China	22,323	22,810	25,907	32,297	44,014	58,533	70,814	77,713	80,592	74,292
Indonesia	1,070	1,140	1,220	1,348	1,388	1,441	1,479	1,451	1,488	1,553
Malaysia	2,128	2,040	2,005	1,856	1,803	1,885	2,002	2,010	2,114	2,156
Mongolia	N/A	N/A	N/A	N/A	N/A	544	714	806	924	1,006
Philippines	447	434	497	477	490	483	508	525	544	542
South Korea	11,785	11,467	11,897	12,851	14,725	15,846	15,871	15,533	15,606	15,974
Sri Lanka	N/A	N/A	N/A	N/A	N/A	N/A	608	764	907	1,143
Taiwan	4,323	4,033	4,085	4,189	4,252	4,266	4,235	4,096	4,134	4,211
Thailand	992	949	1,073	1,245	1,411	1,504	1,641	1,665	1,734	1,734
US	999	949	1,073	1,044	1,141	1,217	1,310	1,456	1,646	1,790
Vietnam	N/A	N/A	N/A	717	938	1,115	1,336	1,570	1,745	2,119

 Shaded figures indicate country was outside top ten for indicated year

* Figures not available (N/A) for this year

g. Canada

With an estimated 5% share of the global education market, Canada hosts approximately 130,000 higher education students from overseas countries each year and, unfortunately, demonstrates the challenges surrounding the collection of international student enrolment statistics. Over the past decade, Canada has gradually increased its international enrolments, but because of legislative changes to student immigration requirements, per year totals released by the national Ministry of Citizenship and Immigration show a decline that may be procedural rather than actual. In 2002, for example, a little more than 49,700 overseas students were reported to have enrolled at Canadian institutions, and whilst Canada experienced growth in the large majority of its markets the following year, around 3,300 fewer students were reported to be studying in Canada, representing a loss of more than 6.7%. According to the Ministry, the Immigration and Refugee Protection Act (IRPA) was largely responsible for the decline, because since its June 2002 implementation students undertaking courses of six months or less no longer require study permits⁴². In other words, the loss of these students is from the data collected, not from the Canadian higher education market⁴³. Indeed, according to the OECD, foreign student enrolments in Canada have grown by 16% since 2000⁴⁴.

South Korean students account for the large majority of Canada's recorded international students, and they have done for the past ten years, with as many as 13,650 (19% of total overseas enrolments) during peak years. Canada's second best source country is China, and between 1997 and 2002, the number of Chinese enrolments grew by more than 1,000%, from approximately 1,000 to 10,100 students. Since 2002, however, recorded Chinese student numbers have declined by nearly 31%, and because these figures are the only ones available, Canada appears to have experienced negative growth in at least one of its two principal markets. Over the last five years, there has also been a 38% decline in the number of students travelling to Canadian institutions from Japan, a country from which Canada has traditionally sourced its third highest number of overseas students. Indeed, even with these declines South Korea, China and Japan have

⁴¹ Alphabetically listed.

⁴² Under the *Immigration and Refugee Protection Act* (IRPA), which came into effect on June 28, 2002, foreign students are classified as temporary residents who are lawfully residing in Canada for the purposes of study. As temporary residents, students registered in accredited programmes lasting six months or less do not require a study permit. The full conditions of the IRPA Act can be accessed at the following address: <http://laws.justice.gc.ca/en/ShowFullDoc/cs/l-2.5//en>. Last accessed 15 May 2007.

⁴³ Citizenship and Immigration Canada (CIC) (2003) *The Monitor*, Spring, p. 6. URL: <http://www.cic.gc.ca/english/resources/statistics/monitor/pdf/issue-01e.pdf>. Last accessed 15 May 2007.

⁴⁴ OECD (2006) 'Draft OECD Briefing Note for Canada', *Education at a Glance 2006*, September, p. 6. URL: <http://www.oecd.org/dataoecd/52/1/37392733.pdf>. Last accessed 16 May 2007.


accounted for more than 43% of foreign student flow for the past five years, making Canada predominantly reliant on Asia as a regional source of students.

Outside of Asia, France and the US are amongst Canada's more consistent source countries. In the case of France, whilst the predominantly French-speaking province of Quebec attracts a large majority of French students for linguistic reasons, it presumably does so even more for economic ones. Under the conditions of a Quebec-France political agreement, the provincial government classifies all students from France as 'domestic' students, and for this reason, French students are eligible for the province's significantly reduced tuition fees⁴⁵ which, coupled with a cost of living much lower than that in France, is a powerful economic incentive. For US students, meanwhile, even with the additional fees for which they are responsible as foreign students, Canadian higher education is substantially cheaper than it would be at home with the added advantage of cultural familiarities and a similar educational system in what equates to an international, but not foreign, destination.

Despite a solid international reputation, a high quality of living and more affordable provision amongst the English-speaking destinations, Canada attracts fewer overseas students than it might were the Government to more actively promote the country's considerable advantages. Much like Japan, Canada has one of the highest tertiary participation rates in the world, but with overseas enrolments representing less than 9% of total enrolments, the country has substantial capacity to improve foreign numbers. To its credit, the Ministry of Citizenship and Immigration Canada seems to have recognised the contribution foreign students make to Canada's academic, business and cultural communities and with the implementation of legislation to widen employment opportunities for overseas students, governmental efforts are being made to market Canadian higher education abroad. Yet because education is constitutionally a provincial rather than a federal responsibility, Canada has a more difficult time co-ordinating national and provincial strategies. The absence of a national education body likewise makes the collection and analysis of foreign student data difficult, and without appropriate mechanisms to monitor foreign student trends, it will be challenging for Canada to develop the recruitment strategies needed to stay competitive in a rapidly changing student market.

Table 7: Canada's top ten source countries 1997-2006⁴⁶

Country	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006**
Brazil	641	999	1,290	1,617	1,760	1,261	592	738	878	395
China	1,005	1,765	3,527	5,337	9,399	10,126	9,068	6,783	6,880	7,259
France	2,882	3,109	3,707	4,031	4,048	3,350	3,300	3,469	3,560	4,059
Germany	1,382	1,395	1,576	1,897	1,950	1,826	1,595	1,739	1,858	1,853
Hong Kong	1,297	1,155	1,225	1,443	1,418	1,346	1,209	1,100	947	NA*
India	338	428	625	751	960	1,546	1,819	1,276	1,617	2,088
Japan	5,842	5,501	5,762	5,579	6,436	5,847	5,262	5,031	4,786	3,736
Mexico	1,991	2,631	2,992	4,178	4,753	3,556	2,064	2,083	2,262	2,290
South Korea	8,473	3,659	6,408	10,635	13,239	13,651	12,881	12,275	12,505	11,894
Taiwan	2,017	1,916	2,067	2,350	1,986	2,053	1,512	1,744	1,697	1,547
UK	1,174	1,249	1,358	1,328	1,461	1,112	1,043	1,210	1,293	1,147
US	3,879	4,096	4,459	4,892	4,721	4,055	3,782	3,879	3,782	3,119

 Shaded figures indicate country was outside top ten for indicated year

* Figures for Hong Kong not available (N/A) this year ** Figures available year to date

⁴⁵ Under a France-Quebec political accord, all French citizens and a certain number of citizens of approved countries may be exempt from the supplemental tuition fees international students are normally required to pay to attend a higher education institution in Quebec. A complete list of exempted countries can be found on the website of the Ministry of Education, Leisure and Sport (MELS): http://www.mels.gouv.qc.ca/ens-sup/ens-univ/droits_scolarite-A_pays-organisations.pdf. Last accessed 11 May 2007.

⁴⁶ Alphabetically listed.

h. New Zealand

New Zealand owns an approximate 3% share of the international education market, and during peak years, overseas students have accounted for as much as 10% of the country's total number of tertiary enrolments. Yet on the basis of per year enrolments, New Zealand is perhaps most representative of 'peak and decline' patterns of foreign student numbers, because after rapid growth in the number of international students coming to the country, the majority of its markets have declined in recent years. In the five years from 1998 to 2004, total international student numbers increased by more than 542%, from just over 9,200 to 50,450 overseas students. Foreign student percentages increased just as rapidly, from 3% in 1998 to 10% during the same period of time⁴⁷. In contrast, since 2004, the country has experienced negative growth in total international numbers, with enrolments declining by more than 15% from a peak per year enrolment number of 50,450 to less than 42,700 students last year.

According to the Ministry of Education, the Asian economic crisis of the late 1990s was a contributory factor to the drop in international student numbers, and once economies began to grow, so too did enrolments⁴⁸. Yet the remarkable growth (and subsequent decline) in New Zealand's foreign numbers is perhaps more attributable to the number of Chinese students enrolling in the country's institutions. Between 1998 and 2004, student numbers from China increased by 21,580%, from 139 to 30,000 students, with rapid enrolment rates in university enrolments in particular. Whilst Chinese student numbers at New Zealand's universities were virtually non-existent in the late 1990s, within six years, they accounted for 58% of all international university students and 10% of overall university enrolment⁴⁹. Between 2004 and 2005, however, the number of Chinese nationals studying in New Zealand decreased by 3,330 students, representing -11% growth and total foreign enrolments during the same time declined by 6%, a drop of more than 3,000 students.

New Zealand was an attractive destination for students from Asia, especially Malaysia, but with more than half of all overseas enrolments now coming from China, the country has become over-dependent on the Chinese market. Indeed, because the overwhelming majority of international students are Asian, the extremely narrow geographical focus of the country's education export is a considerable disadvantage. The US and Fiji are amongst the very few non-Asian source countries which annually send students to the country, but with a combined per year enrolment total of a few hundred students, their financial contribution to the country's economy is almost negligible, at least in comparison to the income predominantly generated by students from China. In the past, as the country's fifth largest service export, education services have generated as much as US\$1.46 billion per year in foreign exchange, placing it firmly amongst New Zealand's leading industries. In 2005, for example, whilst international education still contributed US\$1 billion to the economy, it generated US\$500 million less than it did the previous year, mostly as a result of the fall in Chinese enrolments⁵⁰.

Much like Canada, as an English-speaking country with a high standard of living, New Zealand is naturally attractive as a host country. With the least expensive tuition fees out of all of the leading higher education destinations, it is hardly surprising that the country has proven popular amongst students from developing nations, especially given how close it is in terms of geography to Asia and the South Pacific. The last years, however, have been challenging ones for New Zealand's

⁴⁷ Ministry of Education (2004) 'International Students', *Profile & Trends: New Zealand's Tertiary Education Sector 2003*, November, p. 76. URL: <http://educationcounts.edcentre.govt.nz/publications/downloads/profile--trends-2003-web.pdf>. Last accessed 16 May 2007.

⁴⁸ Ministry of Education (2003) 'Introduction and Overview', *Profile & Trends: New Zealand's Tertiary Education Sector 2002*, November, p. 10. URL: <http://educationcounts.edcentre.govt.nz/publications/downloads/tsr-report-2002-revised-web-version.pdf>. Last accessed 16 May 2007.

⁴⁹ Xiaoying, M. and Abbott, M. (2007) 'Entering International Markets: New Zealand's Problems', *International Higher Education*, Centre for International Higher Education, Boston, USA, Number 46, Winter, URL: http://www.bc.edu/bc_org/avp/soe/cihe/newsletter/ihe_pdf/ihe46.pdf. Last accessed 21 May 2007.

⁵⁰ Ministry of Education (2006) *International students enrolled in Tertiary Education*, December, p. 2. URL: <http://www.educationcounts.edcentre.govt.nz/indicators/downloads/tspar12-International%20students.pdf>. Last accessed 17 May 2007.

export education industry, and not only because of the fall in Chinese numbers. Rising competition in the global education market and the emergence of new Asia-Pacific regional players such as Malaysia, Singapore and Hong Kong, in addition to Australia, have placed the country in the unenviable position of having to re-evaluate what it is the country has to offer overseas students. In comparison to the rest of the major host nations, New Zealand has a limited higher education capacity, with only eight publicly-funded institutions and lower 'brand' visibility in the international market, and this may be part of the reason why students from China, if still pursuing overseas studies, seem increasingly to be going elsewhere. With a rising exchange rate, the country may eventually no longer be the 'low-cost' destination it is at present, and unless the Government develops a strategy to more effectively market the country's benefits to a broader audience, New Zealand is likely to have a difficult time maintaining its competitive advantage⁵¹.

Table 8: New Zealand's top ten source countries 1997-2006⁵²

Country	1997*	1998	1999	2000	2001	2002	2003	2004	2005	2006*
China	88	139	890	3,821	9,652	19,135	27,180	29,876	26,546	N/YA
Fiji	291	464	458	501	651	807	695	693	644	N/YA
Hong Kong	408	437	479	456	512	517	469	447	432	N/YA
India	36	71	120	334	823	1,614	2,035	1,942	1,886	N/YA
Indonesia	342	312	359	382	457	435	374	349	315	N/YA
Japan	1,240	1,207	1,549	1,866	2,402	2,583	2,138	2,104	2,040	N/YA
Malaysia	2,769	2,302	1,939	1,661	1,508	1,216	1,130	1,258	1,329	N/YA
South Korea	585	389	770	1,267	2,030	2,493	2,165	2,030	2,094	N/YA
Singapore	203	213	241	172	195	198	232	231	258	N/YA
Taiwan	423	462	475	515	585	604	420	416	425	N/YA
Thailand	504	481	606	681	800	867	748	687	654	N/YA
US	N/A	459	595	777	1,014	1,354	1,799	2,301	2,480	N/YA

Shaded figures indicate country was outside top ten for indicated year

* Figures not available (N/A) for this year ** Figures not yet available (N/YA) for this year

The Emerging Contenders: Malaysia, Singapore and China

At present, Malaysia, Singapore and China have a combined share of approximately 12% of the global student market with somewhere between 250,000 and 300,000 students having decided to pursue higher education studies in these countries in 2005-6 (please see Appendix B). In terms of student numbers, China has experienced especially rapid growth, but because each nation has taken active measures to develop strategic initiatives to recruit overseas students, all of them have dramatically increased their competitiveness in a rapidly changing market. The large majority of students come from Asia, with all three countries sourcing students from neighbouring regional nations. Given the socio-cultural and linguistic similarities between them, student mobility between Malaysia, Singapore and China is considerable, and for this reason, they concurrently source and provide significant student numbers from one another.

Interestingly, however, Malaysia, Singapore and China have set ambitious targets to attract thousands more foreign students in the coming years, with each having declared ambitions to become major exporters of higher education. Within the past decade, all three countries have allocated substantial financial and human resources towards the development of 'world-class' higher education, and this is one of the main reasons why they are becoming contenders in the global student market. Indeed, the decision to invest in their national higher education systems is a

⁵¹ Xiaoying, M. and Abbott, M. (2007) 'Entering International Markets: New Zealand's Problems', *International Higher Education*, Centre for International Higher Education, Boston, USA, Number 46, Winter, URL: http://www.bc.edu/bc_org/avp/soe/cihe/newsletter/ihe_pdf/ihe46.pdf. Last accessed 21 May 2007; and 'Exchange rate puts international students off New Zealand', *The New Zealand Herald*, 1 May 2007. URL: http://www.nzherald.co.nz/category/story.cfm?c_id=35&objectid=10437103. Last accessed 21 May 2007.

⁵² Alphabetically listed.

crucial development in their competitiveness, and changing mobility patterns suggest that they might well succeed in establishing a broader portfolio of source countries and students. Secondly, the increasing use of English as a language of instruction is contributing to their growing popularity as an overseas student destination. In the past, language may have acted as a 'mobility barrier' to Asian countries but the adoption of English as a language of instruction in a range of programmes seems to be enabling Malaysia and China to substantially widen, and Singapore to strengthen, their recruitment pools so as to compete on more equal terms with other destinations, and especially with English-speaking ones⁵³. Thirdly, tuition fees and living costs are considerably lower than those in the US, the UK and Australia, and the comparatively low cost of higher education is an attractive feature.

By investing substantial resources in the development and implementation of international higher education initiatives, including recruitment, Malaysia, Singapore and China are rapidly emerging as contenders in the global student market. Certainly, they face certain challenges before increasing their market share, not least regarding infrastructural capacity and immigration procedures. Yet because they appear interested in welcoming overseas students from an increasingly diverse range of countries, they may eventually succeed in their ambitions to become centres of higher education excellence for students beyond Asia. At the moment, whilst neither Malaysia nor Singapore, nor even China can seriously compete with the established English-language destinations, as the cost of higher education becomes increasingly significant, it is likely only a matter of time before they start to challenge at least the non-elite institutions in the competitor countries.

i. Malaysia

Malaysia has an approximate 2% share of the international student market, with around 55,000 foreign students having enrolled in the country's higher education institutions in 2006. Traditionally, the large majority of them have come from the neighbouring Asian countries of Indonesia, Thailand, Bangladesh, the Maldives, Singapore and, overwhelmingly, China. Over the past decade, on average, Chinese students are believed to have accounted for approximately 35% of Malaysia's total overseas student enrolments each year, presumably at least partially as a result of the geographical proximity between the two countries. More recently, however, the country has experienced a decline in the number of Chinese students enrolling in Malaysian institutions, with numbers reportedly dropping from 10,230 to 9,075 between 2003 and 2004⁵⁴. Since the late 1990s, in an attempt to enhance the competitiveness of its own institutions and facilities, and to dissuade 'home grown' students from going abroad for studies, China has been allocating substantial resources towards the development of its own higher education system. In light of the country's investment, Chinese mobility patterns to Malaysia appear to be changing.

Beyond China, Malaysia has reportedly managed to attract a modestly growing number of students from Africa and the Middle East, including Botswana, Sudan, Yemen and Saudi Arabia⁵⁵. According to the Ministry of Education, the Government is encouraging public and private institutions to launch promotional campaigns to attract student from targeted countries, Botswana

⁵³ The Malaysian government has introduced English-medium instruction in science and technology subjects at the higher education level, following a similar development in secondary education in 2002. In addition to Beijing University, other leading Chinese institutions in China have reportedly started to do the same. For more information, see 'Malaysia launches new US\$4.8 billion higher education strategy in continued pursuit of 'regional hub' status', *The Observatory on Borderless Higher Education (OBHE)*, 28 April 2006. URL: <http://www.obhe.ac.uk/cgi-bin/news/article.pl?id=549&mode=month>. Last accessed 13 June 2007; and 'English Orated Here', *Newsweek*, 26 February 2007. URL: <http://www.msnbc.msn.com/id/17202839/site/newsweek/>. Last accessed 26 April 2007.

⁵⁴ 'What foreign students want', *The New Straits Times Online*, 24 May 2007. URL: http://www.nst.com.my/Current_News/NST/Thursday/National/20070524080805/Article/index.html. Last accessed 8 June 2007.

⁵⁵ In light of a new Malaysian scholarship programme, which is expected to provide 1,000 students with an opportunity to study in Malaysia over the next four years, more students might soon be coming from Saudi Arabia. For more information, see 'Saudi students look towards Malaysia for higher studies', *Arab News Agency*, 3 May 2007. URL: <http://www.arabnews.com/?page=1§ion=0&article=95719&d=3&m=5&y=2007>. Last accessed 8 June 2007.

amongst them⁵⁶. In the case of Botswana, the country is likely to gain higher 'brand' visibility amongst students as a result of a newly-opened Malaysian branch campus in the country⁵⁷. Indeed, the Gaborone-based campus may well prove an ideal point of entry for additional recruitment from regional African countries such as Namibia and Kenya, both of which have already received delegations from Malaysian institutions in recent months⁵⁸. A recruitment campaign is likewise underway in the Middle East, with the Ministry of Education marketing Malaysia's good value in comparative terms, and highlighting its socio-cultural and religious similarities with this region⁵⁹.

Targeted recruitment strategies are thus largely responsible for Malaysia's expanding portfolio of source countries, with the Ministry of Education having established an international student division aimed at attracting 100,000 overseas students and facilitating their 'entrance and management' by 2010⁶⁰. Should it manage to do so, the country's foreign student population would effectively double over the next three years. Malaysia certainly offers several incentives to prospective international students, including comparatively well-priced tuition fees and low living costs. Moreover, with a pluralist culture formed of ethnic Malay, Chinese and Indian communities, the nation shares cultural similarities with certain communities of internationally mobile students, Indian and Chinese nationals amongst them. In addition to Malaysia's natural geographic and demographic advantages, the multilingual provision on offer in the country's institutions could make it increasingly popular amongst non-English-speaking students, or those for whom English is a second language. For these reasons, Malaysia could potentially evolve into an attractive foreign student destination⁶¹.

Before it can do so, however, and in spite of allocating as much as US\$4.8 billion towards infrastructural improvements, Malaysia still faces several significant difficulties. First and foremost, much as they do in China, and to a lesser extent, Singapore, bureaucratic difficulties are arguably impeding Malaysia's competitive progress in the global education market. According to international student recruitment company Education Service Co-ordination International (M) Sdn Bhd (ESCI), slow application processing times, poor communication and dated promotional tactics are amongst the country's most critical problems⁶². Should Malaysia realistically want to challenge the world's leading destinations for foreign students, it will have to substantially improve the delivery systems of its institutions, especially the publicly-administered ones, to better accommodate prospective overseas students and provide them with promised services. Indeed, whilst substantial funding has already been allocated towards the development of quality assurance schemes for both public and private providers, the Government will likely have to commit further resources should it expect to achieve the strategic research and education priorities identified in the country's economic plan for 2006-10⁶³. Nonetheless, with lower living costs than

⁵⁶ 'Bid to double foreign students at varsities', *The Star Online*, 23 April 2007. URL:

<http://thestar.com.my/news/story.asp?file=/2007/4/23/nation/17519507&sec=nation>. Last accessed 8 June 2007.

⁵⁷ 'LimkokWing University of Technology opens branch in Botswana', *Malaysian National News Agency (Bernama)*, 15 May 2007. URL: http://www.bernama.com/bernama/v3/news_lite.php?id=261913. Last accessed 6 June 2007. For more information on Malaysia's recent international partnerships, also see The Observatory's Breaking News from 17 May 2007. URL: <http://www.obhe.ac.uk/cgi-bin/news/article.pl?id=639&mode=month>. Last accessed 6 June 2007.

⁵⁸ 'LimkokWing University of Technology opens branch in Botswana', *Malaysian National News Agency (Bernama)*, 15 May 2007. URL: http://www.bernama.com/bernama/v3/news_lite.php?id=261913. Last accessed 6 June 2007.

⁵⁹ 'Winning over Saudi Students', *The Star Online*, 27 May 2007. URL:

<http://thestar.com.my/education/story.asp?file=/2007/5/27/education/17829441>. Last accessed 8 June 2007; and 'Saudi Arabia shifts its glance eastward for higher education collaborations', *OBHE*, 29 March 2006. URL:

<http://www.obhe.ac.uk/cgi-bin/news/article.pl?id=541&mode=month>. Last accessed 8 June 2007.

⁶⁰ In May 2007, Malaysia's Ministry of Higher Education established an international student division aimed at facilitating the 'entrance and management' of foreign students, which was expected to be operational in July 2007. The division builds on the January 2007 launch of a 'Strategic Plan for the International Marketing of Higher Education in Malaysia 2006-10' launched by the country's Department of Higher Education Management.

⁶¹ 'Malaysia launches new US\$4.8 billion higher education strategy in continued pursuit of 'regional hub' status', *OBHE*, 28 April 2006. URL: <http://www.obhe.ac.uk/cgi-bin/news/article.pl?id=549&mode=month>. Last accessed 13 June 2007.

⁶² 'Move To Draw 100,000 Foreign Students Hits Snag', *Malaysian National News Agency (Bernama)*, 10 June 2007. URL: http://www.bernama.com.my/bernama/state_news/news.php?id=266674&cat=st. Last accessed 13 June 2007.

⁶³ In March 2006, the Malaysian government announced the Ninth Malaysia Plan (9MP), a set of strategic priorities for the period 2006-10. Entitled 'Together Towards Excellence, Glory and Distinction', it outlines budgetary concerns for higher education and research. For more information, please refer to The Observatory's 28 April 2006 Breaking News

Singapore, a growing number of foreign partnerships and multi-lingual provision, Malaysia is well on its way to becoming an increasingly competitive player in higher education.

j. Singapore

On the basis of recent overseas enrolment numbers, Singapore appears to own a 2% share of the global education market, and over the past five years it has become an increasingly popular education destination. In 2005, approximately 66,000 foreign students enrolled in the country's higher education institutions, an increase of 32% over the estimated 50,000 that did so three years before. Historically, the large majority of the country's foreign students have come from the neighbouring countries of Indonesia and Malaysia, but since 2002 Singapore has been welcoming overseas nationals from increasingly diverse nations. At that time, on the basis of recommendations made by an Economic Review Committee (ERC), the Government decided to target countries previously affected by the Asian financial crisis of the late 1990s, including China⁶⁴. Singapore managed to recruit as many as 15,000 Chinese students in that year alone, making Chinese students accountable for up to 30% of total foreign enrolments in the country⁶⁵. With as much as 13% of Singapore's total higher education enrolments estimated to come from overseas, the country's strategic recruitment has been very successful indeed.

Singapore's economy partially explains why it is rapidly emerging as a player in the international student market. Not only is the South East Asian country in a geographically favourable location close to countries with internationally mobile populations, India, South Korea and Japan amongst them, but as an English-speaking nation, it has certain advantages over other competitors. In light of these reasons, the Government seems to be fully aware that by internationalising Singapore's higher education system, it could transform the country into a highly attractive destination. Since 1997, therefore, Singapore's Economic Development Board (EDB) has very publicly invited foreign institutions to invest in the country by establishing partnership programmes and branch campuses in collaboration with 'local' universities and polytechnic colleges⁶⁶. The University of Chicago's Graduate School of Business (US) and INSEAD (France) are amongst the more internationally recognised institutions to have done so, with the EDB having successfully reached its target of attracting 10 'world-class' universities to the country in the past decade⁶⁷.

It is Singapore's demography, however, which makes it an especially attractive destination for international students, especially those coming from Asia and the South Pacific. With a population consisting of ethnic Indians, Malays and Chinese, Singapore has the capacity to provide regional students with a 'Western' education in a familiar socio-cultural environment. Given that Singapore offers bilingual provision for many of its programmes, it may become even more popular amongst Chinese students in particular because of the opportunity to pursue overseas studies in Mandarin, in addition to English. For this reason, whilst it might seem an ambitious target, the country's ministry of Foreign Affairs believes that by purposefully marketing Singapore as a regional 'centre of excellence' offering the best of 'East' and 'West', it can successfully attract an additional 150,000

article, 'Malaysia launches new US\$4.8 billion higher education strategy in continued pursuit of 'regional hub' status. URL: <http://www.obhe.ac.uk/cgi-bin/news/article.pl?id=549&mode=month>. Last accessed 13 June 2007.

⁶⁴ The Economic Development Board (EDB) (2006) *Singapore: The Global Schoolhouse*, 1 February. URL: http://www.sedb.com/edb/sg/en_uk/index/news_room/publications/singapore_investment2/singapore_investment0/singapore_the_global.html. Last accessed 24 May 2007.

⁶⁵ 'Singapore - New Mecca for Chinese Students', *People's Daily Online*, 16 May 2002, URL: http://english.people.com.cn/200205/16/eng20020516_95807.shtml. Last accessed 8 June 2007.

⁶⁶ The EDB is a leading government agency responsible for the development and implementation of economic strategies to enhance Singapore's position as a global hub for business and investment. For more information, please visit: URL: http://www.edb.gov.sg/edb/sg/en_uk/index.html. For more information, please see EDB (2006) *Singapore: The Global Schoolhouse*, 1 February. URL: http://www.sedb.com/edb/sg/en_uk/index/news_room/publications/singapore_investment2/singapore_investment0/singapore_the_global.html. Last accessed 8 June 2007.

⁶⁷ For further information about the 'world-class' institutions which have already established a campus in Singapore, please see EDB (2006) *Singapore: The Global Schoolhouse*, 1 February. URL: http://www.sedb.com/edb/sg/en_uk/index/news_room/publications/singapore_investment2/singapore_investment0/singapore_the_global.html; and 'The International Branch Campus - Patterns and Trends', *OBHE*, October 2006. URL: <http://www.obhe.ac.uk/products/reports/ftp/pdf/2006-10-01.pdf>. Last accessed 27 July 2007.

foreign students to the country by 2015⁶⁸. According to the EDB, the country is already on target to do so, and should it manage it Singapore could well become a 'Global Schoolhouse'⁶⁹.

With 'brand name' provision and an international reputation for quality, in terms of value for money, Singapore has the potential to take its place among the more competitive higher education destinations. The country's low living costs and safe conditions present foreign students with an ideal opportunity to pursue overseas studies in an English-speaking environment, all of which boost Singapore's attractiveness as a host nation. In this respect, education services could contribute to substantial growth in Singapore's economy, transforming the export of higher education from a capacity-building measure into a revenue-generating industry⁷⁰. Yet whilst the country has managed to establish itself as an increasingly influential player, foreign institutions may be more hesitant to continue investing so substantially in the country in light of University of New South Wales's June 2007 decision to close its Singapore campus (UNSW Asia). At the very least, the unexpected closure is a setback towards the country's ambitions to be Asia's regional higher education centre, as the Australian institution was one of the more public supporters of Singaporean education. More worryingly, it could potentially dissuade other institutions from setting up shop in the country amidst concerns over financial sustainability and the level of academic freedom available in the country⁷¹. Should Singapore manage to develop appropriate parameters of financial and academic governance, however, it will prove a worthy contender.

k. China

In terms of international student enrolments, China has a nearly 7% share of the global student market, with overseas student numbers rapidly increasing in recent years. In 1999, less than 45,000 foreign students were enrolled in Chinese institutions, but in 2005, more than 141,000 students predominantly from Asia travelled to the world's most populated nation for the purposes of higher education. Since 2001 alone, international enrolments in the country's institutions have increased by more than 228%, with the large majority of students coming from South Korea and Japan⁷². According to China's Ministry of Education, South Korean nationals accounted for 25% of all international students in 2005, with more than 35,300 having reportedly registered at Chinese institutions. In the case of Japan, the country has proven one of China's most consistent source countries, and per year Japanese student numbers have represented as much as 20% of total

⁶⁸ EDB (2006) *Singapore: The Global Schoolhouse*, 1 February. URL: http://www.sedb.com/edb/sg/en_uk/index/news_room/publications/singapore_investment2/singapore_investment0/singapore_the_global.html. Last accessed 25 May 2007.

⁶⁹ By attracting a mix of students from all over the world and providing educational programmes of all types and at all levels, Singapore's Government aims to transform the country into 'Global Schoolhouse' by attracting a mix of students from all over the world and providing educational programmes of all types and at all levels. For more information on how the country intends to do so, please see EDB (2006) *Singapore: The Global Schoolhouse*, 1 February. URL: http://www.sedb.com/edb/sg/en_uk/index/news_room/publications/singapore_investment2/singapore_investment0/singapore_the_global.html. Last accessed 25 May 2007; and 'Singapore - New Mecca for Chinese Students', *People's Daily Online*, 16 May 2002. URL: http://english.people.com.cn/200205/16/eng20020516_95807.shtml. Last accessed 8 June 2007.

⁷⁰ Singapore Department of Statistics (2002) *The Education Industry in Singapore*, December. URL: <http://www.singstat.gov.sg/papers/op/op-b17.pdf>. Last accessed 8 June 2007; and 'US slips in luring world's brightest', *International Herald Tribune*, 22 December 2004. URL: <http://www.iht.com/articles/2004/12/21/news/education.php>. Last accessed 8 June 2007.

⁷¹ 'A miscalculated level of risk? UNSW Asia announces its unexpected closure', *OBHE*, 1 June 2007. URL: <http://www.obhe.ac.uk/cgi-bin/news/article.pl?id=643&mode=month>. Last accessed 8 June 2007; also see 'Latest UK branch campus developments: University of Warwick rejects plans for Singapore campus and Liverpool moves into China', *OBHE*, 20 October 2005. URL: <http://www.obhe.ac.uk/cgi-bin/news/article.pl?id=417&mode=month>. Last accessed 8 June 2007.

⁷² Data on the number of international students studying in China is difficult to obtain, not least because the Chinese Government does not release full data sets on incoming student mobility. According to the Chinese Ministry of Education, however, international student enrolment grew by 213% between 1999 and 2005. In the past five years, international student enrolment in China has reportedly increased by more than 20% annually. For more information, see 'China to double foreign student intake by 2020', *People's Daily Online*, 8 August 2006, URL: http://english.people.com.cn/200608/08/eng20060808_290712.html. Last accessed 8 June 2007; and Ministry of Education (MOE) *International students in China*, URL: http://www.moe.edu.cn/english/international_3.htm. Last accessed 8 June 2007. Special thanks to Guoping Feng, Lecturer in English at Shanghai University, and doctoral candidate in comparative education at East China Normal University for providing additional statistics.

foreign enrolments in past years. In addition to South Korea and Japan, Indonesia, Thailand and Vietnam together sent approximately 7,500 students to China in 2005, with Mongolia and Nepal responsible for an additional 2,000 enrolments.

Quite significantly, an increasing number of students from non-Asian countries are also going to China, especially since the country's 2001 accession to the World Trade Organisation⁷³. Unlike the more 'traditional' higher education destinations of Japan, Canada and New Zealand, each of which heavily depends on one or two countries for foreign enrolments, China now seems to be sourcing students from a progressively diverse portfolio of countries, including the US and Russia. According to the International Institute of Education, the number of US students studying in China increased by close to 393% between 1997 and 2005, from approximately 1,600 to 6,400 'study abroad' students over the eight-year period. Between 2004 and 2005 alone, China's total US enrolments grew by more than 35%, and the country is now the eighth most popular destination for 'study abroad' US students. China is likewise becoming a more attractive country for overseas Russian students, and with an estimated 2,000 Russians currently studying there, a substantial increase from past years, the number is likely to grow further as China becomes a more visible 'brand' in the global market⁷⁴.

Since 2003, the number of international students enrolling in Chinese institutions has increased by close to 82%⁷⁵. This number is perhaps somewhat inflated by the temporary dip in 2003, when as a result of the Severe Acute Respiratory Syndrome (SARS) epidemic numbers declined from more than 85,800 to 77,700 students, a 9% decrease. Still, with the world's largest and fastest growing economy, China is a place where leading industrial players want to be doing business, and given the growing number of collaborations between multi-national corporations and Chinese universities, they appear to want to be doing it in collaboration with the country's higher education system⁷⁶. For this reason, the international students of today understand Chinese higher education as a strategic investment in future employment.

As an emerging player in the global education market, and a relative latecomer to the 'massification' of higher education, China is in the rather fortunate position of being able to select from amongst the more successful practices of other nations⁷⁷. By doing so, it could substantially shorten the 'exploratory' period necessary for most countries to develop and implement competitive international recruitment measures⁷⁸. China has learned by example, much to its strategic advantage, and over the last decade the Government has taken significant steps to make the country more attractive to overseas arrivals⁷⁹. By channelling as much as US\$4 billion into a

⁷³ On 11 December 2001 China became a member of the World Trade Organisation (WTO). Under the conditions of its accession and in accordance with WTO rules, the country agreed to better integrate into the world economy and offer a more predictable environment for trade and foreign investment by liberalising its trading system. For more information on China's entry into the WTO, please see the WTO, and specifically, 'WTO successfully concludes negotiations on China's entry', *2001 Press Releases*, 17 September. URL: http://www.wto.org/english/news_e/pres01_e/pr243_e.htm. Last accessed 27 July 2007; and 'Foreign students in China on the rise', *People's Daily Online*, 15 April 2003, URL: http://english.people.com.cn/200304/15/eng20030415_115202.shtml. Last accessed 27 July 2007.

⁷⁴ 'Beyond the 'near-abroad'? Russia prepares for a more prominent position in the international higher education market, *OBHE*, 1 November 2006. URL: <http://www.obhe.ac.uk/cgi-bin/news/article.pl?id=590&mode=month>. Last accessed 8 June 2007.

⁷⁵ 'China grows as study hotspot for U.S. students', *International Herald Tribune*, 7 December 2005. URL: <http://www.iht.com/articles/2005/12/07/news/students.php>. Last accessed 8 June 2007.

⁷⁶ Ibid; and 'Beware the 'golden handcuffs'? The rising number of research partnerships between major US technology firms and universities', *OBHE*, 13 November 2006. URL: <http://www.obhe.ac.uk/cgi-bin/news/article.pl?id=593&mode=month>. Last accessed 8 June 2007.

⁷⁷ Yang, R. (2004) 'Toward massification: Higher education development in the Peoples Republic of China since 1949' in J. Smart (ed.) *Higher education: Handbook of Theory and Research*, Amsterdam, Kluwer. pp. 311-74.

⁷⁸ Ibid.

⁷⁹ Amongst them are Project 211 and the 985 Programme. Project 211 is an initiative aimed at strengthening approximately 100 higher education institutions and key disciplinary areas in the context of the country's socio-economic advancement. The 985 Programme is a more targeted initiative to invest approximately RMB 30 billion (US\$4 billion) in China's 'top' 10 institutions. For further information, see Yang, R. (2003) 'Progresses and paradoxes: New developments in China's higher education' in K.H. Mok (ed.) *Centralisation versus decentralisation: Educational reforms and changing governance in Chinese societies*, Hong Kong, Comparative Education Research Centre, University of Hong Kong, pp. 173-200. URL: <http://www.education.monash.edu.au/centres/mcrie/docs/bookchapters/yang-2002-cityuhk.pdf>. Last accessed 8 June 2007; and Welch, A. (2007) 'The Minnow and the Whale: Singapore-China relations in Higher

select few of its more research-intensive institutions, China is taking great strides to transform the overall quality of higher education in the country⁸⁰. At present, largely because of its lack of English-language provision, international students account for a negligible percentage of total higher education enrolments. Yet given the sheer volume of China's higher education population, a healthy 23 million students, it would be impossible to realistically compare its foreign-to-domestic enrolment rates with those of other countries, especially in the case of smaller nations such as New Zealand and Canada⁸¹. With more than 2,000 recognised institutions, however, China certainly has the capacity to increase the number of overseas enrolments to the country, and once the country implements internationally acceptable quality assurance frameworks, it almost definitely will do so.

4 Recruitment

Given the increasing competition in the market and changes in mobility patterns outlined in previous sections, many countries have started to consider how they might implement or strengthen their strategic approaches to international recruitment, with several having already done so. Indeed, there are various elements to which countries seem to be paying increasing attention in efforts to retain or increase their competitiveness. Motivational factors such as residency and employment privileges, availability and quality of student accommodation, student services and overseas tuition fees stand to make certain countries more attractive than others.

The following section examines patterns within current recruitment strategies and identifies trends in immigration procedures, student expectations and the rising cost of studying abroad, all of which are likely to affect the development of tactics in the coming years (please see Appendix C for a quick reference guide).

a. Visa Schemes and Immigration Procedures

Research undertaken for this report indicates that an increasingly significant element of visa policies concerns opportunities to work in the host country during and after the study period. Combined with the ageing populations of many developed countries, increased competition in the global recruitment market has contributed to student and graduate visa schemes becoming a central part of the recruitment efforts of many major study destinations. Various developments have shown that international student and graduate visa schemes are increasingly used as integral parts of recruitment strategies and are receiving more attention in accordance with their perceived importance and strategic value. This section thus aims to provide an overview of developments within student and graduate visa schemes with a focus on initial student visas and opportunities to remain in the host country for employment purposes upon graduation.

Arguably the most widely covered changes to visa regulations were implemented after the terrorist attacks of 11 September 2001, when the US immediately toughened its visa and immigration requirements. Under the Enhanced Border Security and Visas Entry Reform Act (2002), the US not only introduced a new overseas student tax to fund an advanced computer tracking system for visa

Education', *International Higher Education*, Centre for International Higher Education, Boston, USA, Number 46, Winter. URL: http://www.bc.edu/bc_org/avp/soe/cihe/newsletter/Number46/p22_Welch.htm. Last accessed 8 June 2007.

⁸⁰ In 2002, the MOE stated that there were 2,003 higher education institutions in China, but according to a recently published report, the total number of higher education institutions was 2,273 in 2005, showing the rapid growth of higher education provision in the country. For more information, please see Research and Markets (2006) *China Education and Training Industry Report, 2006-7*, December. URL: <http://www.researchandmarkets.com/reports/c56284>. Last accessed 23 May 2007.

⁸¹ A report published by the OECD in 2003 correctly predicted that the number of Chinese students seeking a postsecondary degree was expected to rise from 11 million students in 2000 to 16 million by 2005 and to keep rising thereafter. For more information, please see OECD (2003) *OECD Review of Financing and Quality Assurance Reforms in Higher Education in the People's Republic of China*, 24 October. URL: <http://www.oecd.org/dataoecd/40/33/17137038.pdf>. Last accessed 8 June 2007; and 'US slips in luring world's brightest', *International Herald Tribune*, 22 December 2004. URL: <http://www.iht.com/articles/2004/12/21/news/education.php>. Last accessed 8 June 2007.

applications, but also made it more difficult for applicants to transfer between visa categories⁸². The downturn in applications and enrolments of international students in the years immediately following were at least partly attributed to the problems widely reported by international students and a common perception that the US had become a less welcoming destination for foreign students. Following appeals for change by a range of stakeholders within the US, the Government has since put considerable effort into improving the situation. In 2006, it was reported that visa approval rates were back to pre-attack levels in most countries⁸³. Amongst international students, however, the effect the changes in visa regulations have had on perceptions of the US might last longer than the practical consequences of the increased security measures.

Moreover, overall policies in place in the US are arguably significantly less accommodating towards international students and graduates compared to some of the country's major competitors. The US does attract a large number of foreigners to its workforce every year, but international graduates of US institutions do not automatically have a right to remain in the country for work purposes upon the completion of their course⁸⁴. Indeed, as part of the student visa application process, applicants have to state that they are not intending to emigrate to the US, an element which has been criticised by the US-based study abroad association NAFSA, amongst others⁸⁵. Recently, however, after reviewing regulations for the university student category of the J-1 exchange visitor visa, the US Department of State has decided to establish a new internship scheme specifically designed for foreign students. Since July 2007, certain international students are eligible to participate in a single year-long internship per degree level for practical training so long as they are able to describe how the experience would enhance their education⁸⁶. In addition, it is The Observatory's understanding that a bill supporting changes to regulation of visas and immigration for graduates in science, technology, engineering and mathematics disciplines (the so-called Securing Knowledge Innovation and Leadership Act of 2006) is currently being considered by judiciary committees within the House of Representatives and the Senate. This scheme is aimed at increasing the number of graduates in the above named disciplines by amending a range of the current regulations⁸⁷.

In considerable contrast, Australia is perhaps the best example of a country using visa and immigration policies to become more attractive to international students. In addition to its points system encouraging skilled immigration, Australian regulations allow all international students completing an Australian degree to remain in the country for 18 months upon graduating. In 2006, the Government was additionally reported to have been considering allowing students to apply for visas of an even longer duration. Students can earn 'bonus points' for skilled work experience and English-language proficiency in addition to those already earned for Australian qualifications, under amendments to the General Skilled Migration Programme (GSM)⁸⁸. In the past, international

⁸² For more information, please see 'President signs border security and visa entry reform act', Office of the Press Secretary, The White House, 14 May 2002. URL: <http://www.whitehouse.gov/news/releases/2002/05/20020514-4.html>. Last accessed 3 September 2007; and US Department of State, 'Enhanced Border Security and Visa Entry Reform Act of 2002 - ALDAC No. 1', 2 May 2002. URL: http://travel.state.gov/visa/laws/telegrams/telegrams_1403.html. Last accessed 3 September 2007.

⁸³ Chin, H.K. (2006) 'The New Landscape of International Student Mobility', *International Higher Education*, Centre for International Higher Education, Number 43, Spring. URL: http://www.bc.edu/bc_org/avp/soe/cihe/newsletter/Number43/p9_Chin.htm. Last accessed 8 June 2007.

⁸⁴ Foreign students who have completed academic studies in science, technology, engineering and mathematics disciplines are able to stay in the US for 12 months upon graduation to undertake an internship with a US employer. Congressional Research Service (CRS) (2006) *Foreign Students in the United States: Policies and Legislation*, CRS Report for Congress, December, URL: <http://www.fas.org/sgp/crs/homesec/RL31146.pdf>. Last accessed 31 July 2007.

⁸⁵ Association of International Educators (NAFSA) (2006) 'Why NAFSA is Supporting a Limited Exemption to Immigrant Intent: A Message from NAFSA's Vice President for Public Policy and Practice', *Public Policy*, March. URL: http://www.nafsa.org/public_policy.sec/international_student_1/immigration_reform_issues/why_nafsa_is_supporting. Last accessed 11 May 2007.

⁸⁶ Department of State (2007) 'Federal Register', 19 June, Volume 72, Number 117. URL: http://exchanges.state.gov/education/jexchanges/about/interim_0607.pdf. Last accessed 31 July 2007.

⁸⁷ Congressional Research Service (CRS) (2006) *Foreign Students in the United States: Policies and Legislation*, CRS Report for Congress, December, URL: <http://www.fas.org/sgp/crs/homesec/RL31146.pdf>. Last accessed 31 July 2007.

⁸⁸ Department of Immigration and Citizenship (2007) 'Skilled – Regional sponsored (provisional) visa (subclass 487)', URL: <http://www.immi.gov.au/skilled/general-skilled-migration/487/eligibility-qualification-aust.htm>. Last accessed 31 July 2007.

students were exempt from work experience requirements when applying for general skilled migration, but under the new legislation, introduced on 1 September 2007, authorities now provide “temporary visa mechanisms” to enable applicants to gain such experience. The changes have reportedly been made in an attempt to strengthen links between study, work experience and employment and to ensure skilled migrants have the skills for which Australia employers are looking⁸⁹. The Government’s stated rationale for the alteration includes a desire for Australia to benefit from the skills of foreign graduates, and the need to respond to the pressure of competitors “busily copying” the country’s programme⁹⁰.

For the UK, because student visa regulations have been tightened and the cost of visa applications increased, in some respects immigration legislation regarding overseas students appears regressive. Over the last couple of years, the British government has revised the rules guiding international student visas, the results of which have affected, amongst other things, the amount payable for student visas. In 2005, the costs of student visas were raised from £35 (approximately US\$70) to £85 (approximately US\$169) and again in early 2007, to £99 (approximately US\$197). Whilst some stakeholders have voiced concern over the significant increases in visa costs, a recent study undertaken on behalf of the Home Office and UK Visas showed that “the option to apply for work without leaving the UK and the number of hours that can be worked were seen as the most important aspects of the visa package rather than the price”⁹¹. Charges have additionally been introduced for visa extensions within the UK. Until August 2003, extensions were free of charge, but since April 2005 the fee for extending a student visa increased from a minimum of £155 (US\$315) to at least £250 (approximately US\$510) and the ability to gain a visa upon entry to the country revoked for nationals of certain countries. Moreover, students have fewer opportunities and diminished rights to appeal decisions made on their applications⁹². In 2007, it was furthermore announced that in order to facilitate the security checking of all non-EU students wishing to enrol in certain science subjects, including nuclear physics and biochemistry, the UK would introduce a new ‘Academic Technology Approval Scheme’. This system will replace the current system whereby universities voluntarily report suspicious student behaviour or activity⁹³.

In other respects, however, UK legislation is rather progressive. As part of a greater scheme to attract highly skilled labour, for example, in 2006 the government amended the Science and Engineering Graduate Scheme (SEGS) to enable all international students who have completed a post-graduate degree course (Master’s or PhD starting after 1 May 2006) to remain in the UK and seek employment for up to 12 months regardless of discipline. The Government also made a special provision for internationally-coveted MBA students, allowing graduates of 50 highly ranked business schools to apply for a three-year extension to their one-year work visa upon completion of their studies. As part of the Highly Skilled Migrant Programme (HSMP), such students have been eligible to apply for permanent residence since 12 April 2005⁹⁴. In March 2007, the Government further extended opportunities for non-EU/EEA students with the announcement that all students who have completed a degree programme in the UK are allowed to stay in the UK for employment purposes. The International Graduates Scheme has been in operation since 1 May 2007⁹⁵.

In light of the advantage student visas seem to be giving major higher education destinations, other countries are following suit in their bid to remain competitive. Since 2002, international

⁸⁹ Department of Immigration and Citizenship (2007) ‘Changes to the General Skilled Migration Programme’, URL: <http://www.immi.gov.au/skilled/general-skilled-migration/changes/index.htm>. Last accessed 31 July 2007.

⁹⁰ ‘The key to competitiveness? Latest developments in international student visas and immigration rules’, *OBHE*, 1 August 2006, URL: <http://www.obhe.ac.uk/cgi-bin/news/article.pl?id=572&mode=month>. Last accessed 11 May 2007.

⁹¹ TNS UK Limited (2007) *Managed Migration Pricing Research: Report of Findings*, 19 March. URL: <http://www.ind.homeoffice.gov.uk/6353/6356/17715/managedmigrationpricingrese1.pdf>. Last accessed 11 May 2007.

⁹² ‘Latest developments in international enrolments in New Zealand: does data confirm global trends?’ *OBHE*, 15 April 2005, URL: <http://www.obhe.ac.uk/cgi-bin/news/article.pl?id=372&mode=month>. Last accessed 11 May 2007.

⁹³ ‘Tighter checks on students from overseas’, *The Observer*, 28 January 2007, URL: <http://education.guardian.co.uk/higher/news/story/0,,2000588,00.html>. Last accessed 15 April 2007.

⁹⁴ ‘The key to competitiveness? Latest developments in international student visas and immigration rules’, *OBHE*, 1 August 2006, URL: <http://www.obhe.ac.uk/cgi-bin/news/article.pl?id=572&mode=month>. Last accessed 11 May 2007.

⁹⁵ Home Office (UK) ‘Information about the International Graduates Scheme’, URL: http://www.workingintheuk.gov.uk/working_in_the_uk/en/homepage/schemes_and_programmes/internationalgraduatescheme.html?. Last accessed 26 April 2007.

students travelling to Canada no longer need apply for study visas ('permits') unless the programmes for which they register are longer than six months in duration. A study permit does afford certain benefits, however, as it gives students permission to seek part-time employment on-campus and since April 2006, off-campus, up to 20 hours per week whilst completing their studies at a designated post-secondary institution⁹⁶. In addition, under the Post-Graduation Work Permit Programme, overseas students who have graduated from Canadian higher education institutions are eligible to apply for employment of up to two years⁹⁷.

In New Zealand, international students do not need a student visa if they are studying for a single course of less than three calendar months' duration, and under certain circumstances, can seek part-time employment for up to 20 hours per week whilst studying in a full-time study course lasting at least six months⁹⁸. More significantly, under amendments to the Skilled Migrant Category effective since 30 July 2007, students have the opportunity to earn 'bonus points' for recognised New Zealand higher education qualifications or for two years of full-time study in the country⁹⁹. Moreover, the number of years required to earn points for work experience in New Zealand will be reduced, and overseas students may be eligible to apply for a work visa for up to two years upon the successful completion of studies in the country¹⁰⁰.

Residency and employment rights are also playing an increasingly important role in recruitment strategies in European countries. Since January 2005, Germany has issued singular permits for both residence and employment, presumably in an effort to attract international students and skilled migrants to the country and to facilitate their arrival. In addition, overseas students are eligible to apply to extend their residence permit for up to one year for the purpose of seeking employment relevant to their field of study after completing their studies¹⁰¹. In France, provided they have a valid residency permit and are enrolled in an institution participating in the French social protection system, international students have the right to work part-time up to 19 hours per week during a given year of study. Following the completion of studies, moreover, students are free to accept offers of employment from French firms by applying for temporary employment authorisation¹⁰².

International student recruitment is thus becoming a motivational factor for key government departments and policy makers to more closely collaborate with national higher education sectors. Indeed, the importance of migration opportunities for overseas students is arguably reflected by the statistics produced through a 2006 survey undertaken by Australia's Monash University. According to the findings, 75% of Indian students who completed a university education in Australia in 2003 applied for and were granted permanent residency visas. The author of the study, Michiel Bass, suggests that the most important reason Indian students chose to come to study in Australia was not the academic reputation of the universities but the opportunity to gain permanent residency

⁹⁶ CIC (2007) 'Studying in Canada: Work permits for students—Working off campus', March. URL: <http://www.cic.gc.ca/english/study/work-offcampus.asp>. Last accessed 31 July 2007; and 'The key to competitiveness? Latest developments in international student visas and immigration rules', *OBHE*, 1 August 2006, URL: <http://www.obhe.ac.uk/cgi-bin/news/article.pl?id=572&mode=month>. Last accessed 11 May 2007.

⁹⁷ CIC (2007) 'Studying in Canada: Work permits for students—Working after Graduation', March. URL: <http://www.cic.gc.ca/english/study/work-postgrad.asp>. Last accessed 31 July 2007.

⁹⁸ Immigration New Zealand (2006) 'All about visas and permits', September, URL: <http://www.immigration.govt.nz/community/stream/employ/employmentprocesses/employingtemporaryworkers/allaboutvisasandpermits/>. Last accessed 31 July 2007.

⁹⁹ Immigration New Zealand (2007) 'Policy changes for 30 July 2007', 10 July, URL: <http://www.immigration.govt.nz/migrant/general/generalinformation/news/julyrelease.htm>. Last accessed 31 July 2007.

¹⁰⁰ Immigration New Zealand (2006) 'Employing students who are eligible to work after the completion of their studies in New Zealand', September, URL: <http://www.immigration.govt.nz/community/stream/employ/employmentprocesses/employingtemporaryworkers/whatisrequired/studytowork/>. Last accessed 31 July 2007.

¹⁰¹ Federal Foreign Office (2005) *The Immigration Act*, September, URL: <http://www.auswaertiges-amt.de/diplo/en/WillkommeninD/EinreiseUndAufenthalt/Zuwanderungsrecht.html>. Last accessed 31 July 2007.

¹⁰² EduFrance (2007) 'Working while a student in France', URL: <http://www.edufrance.fr/en/a-etudier/sejour01-6.htm>. Last accessed 31 July 2007.

visas¹⁰³. For this reason, national governments and education organisations are likely to seek further opportunities to facilitate employment and residence rights for overseas students in order to maintain a competitive advantage.

b. The Student Experience: Expectations and Motivations

Students considering study abroad today have an unprecedented number of opportunities available to them in terms of providers and countries. Importantly, and perhaps because of the 'savvy customer' knowledge of the current generation of overseas students, 'word of mouth' and information disseminated widely via the internet have become efficient marketing tools. In light of this realisation, institutions and countries appear to be increasingly cognisant of the importance of satisfied international graduates, and are thus looking to ensure that their foreign students receive the education and overall student experience they were promised during the recruitment process. Two widely-publicised examples of student protest illustrate the importance of doing so. In March 2006, and again in March 2007, a group of international students at Australia's Central Queensland University went on two brief hunger strikes to protest what they claimed was their treatment as 'cash cows' by the University¹⁰⁴. The following month, *The Australian* newspaper reported that a group of students from Japan, Thailand and China were threatening to sue RMIT University over alleged misleading advertising¹⁰⁵. Such examples of collective action may be indicative of a growing sense amongst international students that their individual grievances regarding value for money are a shared experience, and institutions are now becoming sensitive to the risk of negative publicity resulting from these sorts of group protests.

In the UK, too, the issue of ensuring a satisfactory student experience has been more widely discussed in the recent past. The UK Council for International Education (UKCOSA) in November 2006 published the findings of an extensive survey on international student satisfaction. The organisation concluded in the report that whilst the large majority of overseas students seemed content with the quality of their course, they were less so in relation to their overall student experience, including the accommodation services available to them as non-UK nationals. "The student experience, whether that be access to banking, visas, health and employment, is so important to the reputation not only of universities, but also the UK", commented UKCOSA's Duncan Lane, Director of Advice and Training, "and this needs to [be] encouraged at the highest level of decision making"¹⁰⁶. For this reason, i-Graduate, a UK-based organisation with offices and operations around the world, has developed the 'International Student Barometer', through which participating institutions can assess the level of satisfaction of their international students. Participating institutions include close to 50 institutions in the UK, Australia, the Netherlands, South Africa and the US.

For Australia, the increased focus on student satisfaction has taken place alongside debates surrounding the admission and performance of foreign students. At the end of 2006, a published Australian report suggested that the English-language abilities of more than 33% of Australian fee-paying foreign graduates were so poor that they should never have been granted a visa to study in the country. Robert Birrell, Director of Monash University's Centre for Population and Urban Research and the author of the report, stated that even after graduation from Australian institutions, many foreign students did not have competent English-language skills. By lowering

¹⁰³ 'Universities being use as immigration factories', *Sydney Morning Herald*, 30 March 2006, URL: <http://www.smh.com.au/news/national/unis-used-as-immigration-factories/2006/03/29/1143441215915.html>. Last accessed 6 March 2007.

¹⁰⁴ "Cash cow" students take stand against uni', *The Age*, 14 March 2006. URL: <http://www.theage.com.au/news/national/cash-cow-students-take-a-brief-stand-against-uni/2006/03/13/1142098405192.html>. Last accessed 31 July 2007; and 'Student hunger strike over treatment as 'cash cows'', *The Age*, 15 March 2007. URL: <http://www.theage.com.au/news/national/student-hunger-strike-over-treatment-as-cash-cows/2007/03/14/1173722558965.html>. Last accessed 31 July 2007.

¹⁰⁵ 'Overseas students may sue over uni courses', *The Australian*, 20 June 2006. URL: http://www.nlc.edu.au/vic/index.php?option=com_content&task=section&id=8&Itemid=17. Last accessed 6 July 2007.

¹⁰⁶ For more information about the 'student experience', please see UKCOSA's November 2006 report, *New Horizons: The Experiences of International Students in UK Further Education Colleges – Report of the UKCOSA Survey*; and 'Worthy of pursuit? Several countries begin to consider the potential value of the 'student experience', *OBHE*, 13 February 2007. URL: <http://www.obhe.ac.uk/cgi-bin/news/article.pl?id=618&mode=month>. Last accessed 6 July 2007.

academic standards to help students with poor English proficiency, the country's higher education administrators seemingly favour foreign fee-paying students. Moreover, with approximately 20% of all higher education enrolments in Australia coming from overseas, universities have arguably become financially dependent on foreign fee-paying students¹⁰⁷.

In the UK, an August 2006 article from the Times Higher Education Supplement addressed the income generated from international student enrolment at a range of universities and the proportion of their total income for which such students' fees accounted. The article outlined how income from international students across the UK rose by 28% between 2002-3 and 2004-5 from £1.09 billion (more than US\$2.2 billion) to £1.4 billion (approximately US\$2.8 billion). More tellingly, 26 institutions were shown to derive over 10% of their income from international student fees, and at 10 institutions such fees accounted for more than 15% of total income¹⁰⁸.

In both countries there have been substantial increases in international student enrolments over the past 10-15 years, and, perhaps unsurprisingly, they have not gone unnoticed. In response to what has been referred to as increasing institutional dependence on international students, the advantages allegedly enjoyed by international applicants have caused considerable debate within the higher education community. Interestingly, however, and partly in response to suggestions that overseas students are less academically proficient than domestic ones, in 2005 a study was published which found little difference in academic performance between Australia's domestic and international students. Sponsored by the Australian Universities International Directors' Forum (AUIDF), more than 330,000 students across 22 institutions were surveyed for the study, the results of which arguably challenge the notion of overseas students as little more than 'cash-cows' who lag behind domestic students academically. In light of the study, institutions and other stakeholders have been increasingly keen to stress the academic and cultural contributions made by international students.

Australia has since revised its International Code of Practice on International Students to emphasise "the ethical commitment that quality education be provided and that value be given for the investment made by international students." Given the significant academic and cultural contributions made by international students during their periods of study, and growing competition in the global recruitment market, countries would indeed be wise to treat international students less as sources of income, and more as important contributors to the educational and social health of tertiary institutions.

Despite its status as the most popular international student destination, the US seems to have remained largely untouched by debates like those that have taken place in Australia and the UK. The comparatively high domestic to international student ratio arguably explains why the US, to date, has appeared less preoccupied with student perceptions of their overseas experiences. Indeed, in contrast to Australia, where international students account for roughly 18% of total enrolments, and in the UK for more than 13%, the foreign student population in the US is less than 4%. Moreover, it is concentrated in a relatively small number of institutions; the 142 institutions which host more than 1,000 overseas students account for 53% of international students, with overseas students accounting for 10% of total foreign enrolments at 30 institutions, and more than 20% at universities such as Stanford, Columbia, South California and Carnegie Mellon Universities and the Massachusetts Institute of Technology (MIT)¹⁰⁹.

In light of increasingly 'consumer-savvy' students, and the importance of 'word of mouth' amongst them, the 'student experience' will almost certainly become more of an influential factor in recruitment tactics and strategy in the coming years. Residency and employment rights and quality accommodation, for example, stand to affect not only the student decision-making process prior to

¹⁰⁷ Birrell, R. (2006) 'Implications of Low English Standards Among Overseas Students at Australian Universities', *People and Place*, Volume 14, Issue 4.

¹⁰⁸ Tysome, T. 'Overseas cash injections rises', *Times Higher Education Supplement*, 11 August 2006. URL: http://www.thes.co.uk/current_edition/story.aspx?story_id=2031765. Last accessed 8 June 2007.

¹⁰⁹ Institute of International Education (2006), 'How are nations responding to student mobility?', presentation at the British Council's Going Global 2 Conference, December 2006.

application, but after the overseas experience itself, and for this reason, the little 'perks and privileges' afforded students could go a long way in today's competitive market.

Case Study: Pathway or Foundation Programmes and the 'Student Experience'

In an attempt to increase international student populations, especially as the group of internationally mobile higher education students grows increasingly diverse, countries are looking to diversify not only at which institutions students enrol, but the ways in which students can access tertiary studies. In this regard, international foundation or pathway programmes are becoming popular options for foreign students who require academic and linguistic preparation in order to enter a first or second degree course. Many universities already run their own preparatory programmes, but a number of noteworthy partnerships between public higher education institutions and private, sometimes for-profit, providers have recently emerged in some of the main English-language destinations. In Australia most of the programmes cater for both domestic and international students whereas provision in the UK is mainly targeted at international students needing university preparation. The programmes offer preparation for undergraduate and postgraduate programmes and, in some cases diploma programmes, which replace the first year of an undergraduate degree programme and allow students advanced entry. Upon successful completion of the course (i.e. obtaining a result above a specified threshold) students are usually guaranteed admission to the university.

Most of the provision offered through such private-public partnerships is focused on certain disciplines, usually business, computer science and IT, but some offer a more comprehensive range of course preparation. The preparation programmes are usually offered at one of the campuses of the partner institution, in many cases sharing some facilities such as libraries and accommodation¹. The financial and practical details of the set-up vary from partnership to partnership, with some being established through a joint-venture and 50:50 ownership and others through an arrangement where the private provider runs the programme and pays a fee to the partner university for the use of premises, provision and branding. Some courses are taught solely by staff from the partner university whereas other arrangements entail a mixture of staff employed by the company and university staff¹ or staff teaching the course being 'endorsed' by the partner university¹.

The trend for what could be described as 'out-sourcing' of international student foundation programmes to companies specialising in delivering these types of programmes seems to be most commonly found in Australia, where private provider IBT Education (a publicly-traded company since 2004) is currently offering preparatory courses for international students in partnership with eight Australian universities. In New Zealand, two out of the country's eight universities provide programmes in collaboration with an independent partner.

Such partnerships have more recently emerged in the UK. Since IBT launched the Hertfordshire Institute of Business and Technology (HIBT) in 2000, thereby establishing the UK's first 'international college', the number has grown considerably. In addition to IBT, which has since added the London Institute of Business and Technology¹¹⁰ (LIBT) to its list of partner universities and companies, Kaplan¹¹¹ (owned by the Washington Post) (with three), INTO University Partnerships¹¹² (three) and the Australian INSEARCH¹¹³ (with one) have also entered the market, bringing the total number of partnerships with UK institutions to nine.

¹¹⁰ The London Institute of Business and Technology (LIBT) opened in 2003 and is located at Brunel University. For more information, see: <http://www.libt.uk.com/index.php>.

¹¹¹ Nottingham Trent International College, Sheffield International College and Glasgow International College are amongst Kaplan's international partnership initiatives. For more information, see: <http://www.kaplan.com/kaplaninternational.htm>.

¹¹² INTO's partner universities include the University of East Anglia, the University of Exeter and Newcastle University. For more information see http://www.into.uk.com/05_partner_universities.php.

¹¹³ INSEARCH Essex offers accredited pathway courses at the UK's University of Essex. For more information, see: <http://www.web.insearch.edu.au/international/insearchessex>.

In addition to better preparing students for higher education, such arrangements conceivably provide institutions with a more accurate sense of international student flow, and opportunities to widen the recruitment pool, establish a high retention rate (since many of them remain at the institution and in the country), and outsource this type of preparation to a specialist institution. Indeed, most of the institutions operating the international pathway programmes report a high rate of retention and progression into the university proper following the completion of the programme.

c. Costs associated with an Overseas Education

The cost of education is likely to become an increasingly important factor in the decision-making process of students because as more and more countries provide education opportunities in English, students will have more choice afforded them. Traditionally, the main English-language speaking countries have charged higher fees for international students than have continental European and Asian ones. Yet whilst a handful of western European countries, most of them Nordic (Finland, Iceland, Norway and Sweden), still charge no fees for students in higher education, regardless of nationality, it is likely that the trend of introducing differential and higher fees for international students will continue.

In the 2006-7 academic year, for example, Denmark started to charge non-EU/EEA students tuition fees and Germany's federal constitutional court in 2005 ruled that institutions were allowed to charge tuition fees for their undergraduate programmes. Since that time, seven *länder* (states) have introduced or are looking to introduce fees in the near future¹¹⁴. In the German states of Lower Saxony and North Rhine-Westphalia, institutions started to charge new students €500 (approximately US\$660) per semester in the winter semester of 2006-7, which from the 2007 summer semester will apply to all students enrolled. Fees will also be introduced in the states of Baden-Württemberg, Bavaria and Hamburg, with other regions expected to follow¹¹⁵. At present, international students are predominantly charged the same fees as domestic students, although fees are often higher for postgraduate courses such as Master's taught entirely in English¹¹⁶.

For the purposes of this report, a small study of tuition fees in the eleven destination countries previously discussed has been undertaken. The table below outlines annual tuition fees for three different undergraduate courses based on the latest information available. The institutions included in the study are the first universities established in each country (all of them highly ranked in international league tables). The figures include tuition fees only and do not cover any additional charges, e.g. for administration, library usage, student union membership, etc.

A comparative analysis of the table confirms that international students travelling to the leading English-language higher education destinations (the US, the UK and Australia) can expect to pay higher fees than those charged elsewhere. At the University of Sydney in Australia, tuition fees for a Business and Management programme cost approximately US\$18,600 per year, close to US\$21,800 at the UK's Oxford University and more than US\$31,450 at the US-based Harvard University. In considerable contrast, the same degree costs less than US\$4,500 at China's Shanghai Jiaotong University and Singapore's National University of Singapore, and less than US\$2,000 at the University of Malaya in Malaysia. Whilst international tuition fees are nearly US\$11,500 for a Philosophy programme at Laval University in Canada and the University of Otago in New Zealand, philosophy students at Japan's University of Tokyo are required to pay less than US\$4,600, and only a small administrative fee at University of Paris in France and University of Heidelberg in Germany.

¹¹⁴ 'Germany: New university tuition fees threaten students with poverty', *Indymedia*, 10 March 2007. URL: <http://www.wsws.org/articles/2007/mar2007/tuit-m10.shtml>. Last accessed 27 July 2007.

¹¹⁵ 'Courses and Careers: The Advantages of Studying in Germany', *Deutschland*, February/March, p 11.

¹¹⁶ German Academic Exchange Service (DAAD), (2007) 'Tuition fees on their way'. URL: <http://daad.de/deutschland/wege-durchs-studium/kosten/06199.en.html>. Last accessed 27 July 2007.

Overseas students interested in studying at institutions in the UK and Australia can often pay tuition fees 12 times higher than those for similar degrees in emerging destinations such as Malaysia, Singapore and China, and as much as 18 times higher in the US. Together with escalating living costs, especially in major cities, an overseas education in traditionally popular locations can cost students considerably more than in other countries with a competitive share in the global recruitment market. According to the results of a 2006 survey published by the UK's Council for International Education (UKCOSA), a third of those students sampled reported financial problems as a result of the costs of living being substantially higher than they had anticipated, with surprise at the actual costs of studying in the UK a recurrent theme amongst them¹¹⁷.

A report recently published by New Zealand's Ministry of Education and Education New Zealand, an umbrella organisation promoting the export of the country's education services, found that the cost of higher education was amongst the top factors influencing the decision to study in the country¹¹⁸. For Chinese students in particular, traditionally New Zealand's largest overseas student population, cost was the key factor in the decision about where to study abroad, with 51.3% of students surveyed for research pertaining to the experiences of Chinese students in the country having responded that the comparably low cost of an overseas education in New Zealand was a motivational factor in their choice¹¹⁹. According to Robert Stevens, Chief Executive of Education New Zealand, "the fact that quality and value are the key influences in deciding where to study come as no surprise"¹²⁰, and for this reason, in addition to New Zealand, countries such as Japan and Canada might do well to highlight their affordable provision, and emerging destination such as Malaysia, Singapore and China, their low living costs to prospective students.

Given the expenditure associated with an overseas education, including tuition fees, living costs and visa and immigration charges, cost is likely to motivate students to apply for study to particular destinations, and to deter them from applying to others. Moreover, the usually high value of certain currencies, the UK pound (£) and US dollar (\$) most prominent amongst them, could arguably dissuade students even further from going to high-cost nations, since unfavourable exchange rates exacerbate the already considerable financial concerns of foreign students, especially those from Africa and Southeast Asia. As a result, and not least because it can be a determining factor in the quality of the student experience, cost is almost certain to play a more significant role in the development of strategic recruitment initiatives.

¹¹⁷ UKCOSA (2006) *New Horizons: The Experiences of International Students in UK Further Education Colleges*, p.41.

¹¹⁸ Ministry of Education (2007) 'Making a choice about where to study', *The Experiences of International Students in New Zealand: Report on the results of the National Survey*, January. URL: <http://www.minedu.govt.nz/index.cfm?layout=document&documentid=9939&indexid=11330&indexparentid=6663#P61946245>. Last accessed 31 July 2007.

¹¹⁹ Education New Zealand (2007) *The Experiences of Chinese Students in New Zealand*, April.

¹²⁰ Education New Zealand (2007) 'Chinese student research indicates progress—but still room for improvement', *Media Release*, 30 April. URL: <http://www.educationnz.org.nz/comm/Mediareleases/MR-ChineseStudentResearch0407.pdf>. Last accessed 31 July 2007.

Table 9: Comparative analysis of international undergraduate tuition fees by (alphabetical) country

Country	University	Course	Fee – Local currency	Fee – US\$ ¹²¹
Australia	University of Sydney ¹²²	Business and Management	A\$21,840	US\$18,383
		Mechanical engineering	A\$23,952	US\$20,164
		Philosophy ¹²³	A\$19,248	US\$16,204
Canada	Laval University ¹²⁴	Business and Management	CAD\$10,966.20	US\$10,634
		Mechanical engineering	CAD\$12,226.20	US\$11,852
		Philosophy	CAD\$12,226.20	US\$11,852
China	Shanghai Jiaotong University ¹²⁵	One fee for all undergraduate programmes regardless of subject	Y 24,800	US\$3,300
France	University of Paris (Sorbonne – Paris IV) ¹²⁶	One fee for all undergraduate programmes regardless of subject	€169.57	US\$235
Germany	University of Heidelberg ¹²⁷	International students may be subject to long-term tuition fees according to official legislation on university tuition in the state of Baden-Württemberg	N/A	N/A
Japan	University of Tokyo ¹²⁸	One fee for all undergraduate programmes regardless of subject	¥535,800	US\$4,652
Malaysia	University of Malaya ¹²⁹	Business and Management	MYR 5,933	US\$1,704
		Mechanical engineering	MYR 5,100	US\$1,464
		Philosophy	MYR 5,766	US\$1,656
New Zealand	University of Otago (2008) ¹³⁰	Business and Management	NZ\$17,000	US\$12,120
		Mechanical engineering ¹³¹	NZ\$19,200	US\$13,687
		Philosophy	NZ\$15,500	US\$11,050

¹²¹ Unless otherwise noted, all included tuition fees are for the academic year 2007-8. All local currencies have been converted to US dollars (and rounded to the nearest dollar) according to the exchange rates listed on www.xe.com on 14 September 2007. URL: <http://www.xe.com/ucc/>.

¹²² University of Sydney, 'Undergraduate – Find a course', URL: http://heifer.ucc.usyd.edu.au/ugcourses/FMPro?-db=msr_ugpg.fp5&-format=search.html&-findany. Last accessed 14 May 2007.

¹²³ In this case, listed tuition fees are for a Bachelor of Arts programme because the University of Sydney does not list a Bachelor's degree in Philosophy.

¹²⁴ Laval University (2007) (in French) 'Droit de scolarité Automne 2006 – Hiver 2007, Étudiants étrangers, 1er Cycle', URL: http://www.sf.ulaval.ca/pdf/scol_etr_1_0708.pdf. Last accessed 31 July 2007.

¹²⁵ Information reported by Guoping Feng, Lecturer in English at Shanghai University, and doctoral candidate in comparative education at East China Normal University.

¹²⁶ University of Paris-Sorbonne (Paris IV) (2007) 'Reception of Foreign Students', URL: http://www.paris4.sorbonne.fr/fr/IMG/pdf/Brochure_Eng.pdf. Last accessed 14 May 2007.

¹²⁷ Reprecht-Karls-University Heidelberg (2007) 'Financing your studies', URL: http://www.zuv.uni-heidelberg.de/AAA/english/info_hd_fina.htm. Last accessed 31 July 2007.

¹²⁸ University of Tokyo (2006) 'Enrolment Fee and Tuition', URL: http://www.u-tokyo.ac.jp/stu04/e03_e.html. Last accessed 31 July 2007.

¹²⁹ University of Malaya (2007) 'International Student Fees', URL: http://www.um.edu.my/system/media/downloadables/undergraduates/fees_foreignstudents.pdf. Last accessed 31 July 2007.

¹³⁰ University of Otago (2007) 'International Tuition Fees', URL: <http://www.otago.ac.nz/international/pdfs/2008NZIntlFees.pdf>. Last accessed 31 July 2007.

¹³¹ In this case, listed tuition fees are for a Software engineering programme because the University of Otago does not list a Bachelor's degree in Mechanical engineering.

Country	University	Course	Fee – Local currency	Fee – US\$ ¹³²
Singapore	National University of Singapore ¹³³	Business and Management	S\$6,720 (with tuition grant)	US\$4,445
		Mechanical engineering	S\$6,720 (with tuition grant)	US\$4,445
		Philosophy	S\$6,720 (with tuition grant)	US\$4,445
United Kingdom	Oxford University ¹³⁴	Business and Management	£10,775	US\$21,653
		Mechanical engineering	£12,315	US\$24,748
		Philosophy	£10,775	US\$21,646
United States	Harvard University ¹³⁵	One fee for all undergraduate programmes regardless of subject	US\$31,456	US\$31,456

5 Conclusion

International student mobility is changing the global higher education landscape, with an increasing number of students going abroad for tertiary studies. By providing an overview of recent developments in the leading destinations and emerging countries, this study has identified the competitive measures nations are taking in an effort to increase their share of the global student market. Importantly, because nations understand and account for student mobility differently, this area is still characterised by a lack of comparable data, and for this reason, definitive statistical analyses of reported figures are challenging to produce. In spite of variant conceptions of overseas student mobility, the research undertaken has identified several important trends and emerging patterns.

In terms of sheer numbers, the US dominates the international student market, and as a result of its high 'brand' visibility and established international reputation, it will likely remain the most popular higher education destination in the coming years. With highly recognised qualifications and solid quality assurance mechanisms, the UK and Australia are likewise major players in the global student market, with several hundred thousand international students each year. Yet whilst these three countries share approximately 43% of the recruitment market, the rising price of tuition fees and escalating living costs could deter prospective students from travelling to them in the future, especially given the high value of the currency in each country.

In contrast, the well-priced provision available in Germany and France could render them more competitive in the foreseeable future. With highly respected institutions and targeted recruitment initiatives directed towards countries outside of Europe, both countries have the potential to grow new markets, not least in the Middle East and Asia.

Unlike Germany and France, which attract solid numbers from a variety of countries, albeit those with geographic or historical connections, Japan, Canada and New Zealand largely depend on one or two countries to source their overseas students. Canada and New Zealand in particular have

¹³² Unless otherwise noted, all included tuition fees are for the academic year 2007-8. All local currencies have been converted to US dollars (and rounded to the nearest dollar) according to the exchange rates listed on www.xe.com on 14 September 2007. URL: <http://www.xe.com/ucc/>.

¹³³ National University of Singapore (2007) 'Tuition Fees per Annum', March. URL: <https://team.nus.edu.sg/registrar/info/ug/UGTuition2007-8.pdf>. Last accessed 31 July 2007.

¹³⁴ Oxford University (2007) 'University Composition Fees 2007-8', URL: <http://www.admin.ox.ac.uk/prg/UG3%200708updated.pdf>. Last accessed 31 July 2007.

¹³⁵ Harvard University (2007) 'Financial Aid Office', URL: <http://www.fao.fas.harvard.edu/cost.htm>. Last accessed 31 July 2007.

several benefits to offer the international student, including English-language provision and a high quality of life for a relatively low cost of living, yet despite such advantages, much like Japan, they have failed to grow new markets, and exhibit 'peak and decline' patterns of enrolment. As a result, because each is the midst of developing initiatives to attract, or in some cases, 're-attract' overseas students from particular countries, they are evolving to increase their shares in the market.

By allocating substantial human and financial resources to their higher education systems, and implementing targeted overseas student recruitment initiatives, Malaysia, Singapore and China are transforming incoming mobility patterns. In the past, these countries have traditionally been senders of foreign students, but over the past decade, they have invested considerable effort in the development of 'world-class' institutions so as to welcome higher numbers of international students. In doing so, despite immigration and infrastructural challenges, they have emerged as contenders in the international higher education export industry.

The growing number and diversification of players in the international student market partly explains why countries are seeking innovative strategies to attract higher numbers of students. Yet because the current generation of 'savvy student customers' are more knowledgeable about the opportunities available in certain countries, prospective hosts arguably have little choice but to offer targeted advantages. Research undertaken for this report suggests that visa schemes and immigration procedures will play an increasingly important role in the decision-making process, with students not only seeking employment upon graduation, but perhaps (at least temporary) residency in their country of choice. Countries which facilitate the arrival and integration of overseas students through employment and immigration initiatives are likely to be more competitive in the market.

Institutions and countries are increasingly striving to meet, if not exceed, the expectations of prospective overseas students, because the 'student experience' and the costs associated with an overseas education, including tuition fees and accommodation are becoming significant motivational factors for application to one country over another. Given the rising fees of study abroad, the comparative cost of higher education in particular is likely to give certain countries a competitive edge in the coming years, Malaysia and Singapore amongst them. In light of recent, and perhaps unexpected, trends in international student mobility, however, institutional and national recruitment strategies will almost certainly consider a growing number of indicators to compete in a rapidly changing industry.

Appendix A: Definitions of 'International Student' by (alphabetical) Country

The following definitions are specific to national education systems and specify how each included country identifies the 'international student' for the purposes of data collection and the publication of enrolment statistics:

- Australia:** 'International students' are defined as those studying onshore only with visa subclasses 570 to 575, excluding students on Australian-funded scholarships or sponsorships or students undertaking study whilst in possession of other temporary visas. (Data also exclude students with New Zealand citizenship because they do not require a visa to study in Australia).
- Canada:** 'Foreign students' are defined as temporary residents who have been approved by an immigration officer to study in Canada. Every 'foreign student' must have a student authorisation, but they may also be in possession of other types of permits or authorisations. (Students do not need a study permit for courses of six months or less if they will finish the course within the period of stay authorised upon entry, which is usually six months.)
- France:** 'Foreign students' are defined as foreign nationals who travel to France for the purpose of study or long-term or permanent residents in possession of French secondary qualifications and who likely have French residency status. Data thus include students who are long-term or permanent residents without French citizenship in France and overseas territories such as Guadeloupe, Reunion and Martinique (*départements d'outre mer*, or DOM).
- Germany:** 'Foreign students' are defined as 'mobile foreign students' (*Bildungsausländer*), those who travel to Germany specifically for study, and 'non-mobile foreign students' (*Bildungsinländer*), those in possession of German secondary school qualifications and who likely have German residency status. Data thus include students who are long-term or permanent residents without German citizenship.
- Japan:** 'International students' are defined as foreign nationals who study at any Japanese university, graduate school, junior college, college of technology, professional training college or university preparatory course on a 'college student' visa, as defined by the Immigration Control and Refugee Recognition Act.
- New Zealand:** 'International students' are foreign nationals who travel to New Zealand for the purpose of education, and/or are currently studying on a student permit or domestic passport. Data thus exclude students who are permanent residents. (Data also exclude students with Australian citizenship).
- United Kingdom:** 'International students' are defined as students who are not UK domiciled, and whose normal residence is either in countries which were European Union (EU) members as of 1 December of the reporting period (EU students) or whose normal residence prior to commencing their programmes of study was outside the EU (non-EU students). Data thus exclude students who are permanent residents without British citizenship.
- United States:** 'Foreign students' are defined as students who are enrolled at institutions of higher education in the US who are not citizens of the US, immigrants or refugees. These may include holders of F (student) visas, H (temporary worker/trainee) visas, J (temporary educational exchange-visitor) visas and M (vocational training) visas. Data thus exclude students who have long-term or permanent residency.

Appendix B: International Student Mobility 1997-2006 in Major Destination Countries according to % Market Share

Rank	Country	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
1	US	457,984	481,280	490,933	514,723	547,867	582,996	586,323	572,509	565,039	564,776
2	UK	198,064	213,264	219,285	224,660	230,870	242,755	275,270	300,055	318,400	330,080
3	Australia	100,383	109,285	119,988	138,381	168,916	193,621	218,654	236,142	255,925	281,633
4	Germany	151,870	158,435	165,994	175,065	187,027	206,141	227,026	246,136	246,334	248,357
5	France	N/A	118,433†	151,969	160,533	174,557	196,748	221,471	244,335	255,585	265,039
6	China	43,712	43,030	44,711	52,150	61,869	85,829	77,715	110,844	141,087	162,695
7	Japan	51,047	51,298	55,755	64,011	78,812	95,550	109,508	117,302	121,812	117,927
8	Canada	30,264	29,203	37,695	44,335	52,523	49,746	46,381	41,338	42,590	39,008 (year to date)
9	New Zealand ‡	6,169	9,293	11,922	16,809	26,565	41,461	47,121	50,450	47,369	42,652
10	Singapore	N/A	N/A	N/A	N/A	Approximately 50,000	Approximately 50,000	Approximately 50,000	N/A	72,000	N/YA
11	Malaysia	N/A	N/A	N/A	N/A	N/A	N/A	N/A	27,731	66,000	N/YA

* Figures not available for this year

** Figures not yet available (or not reported) for this year

† Figures available for this year include the number of international students enrolled in universities only

‡ Figures include the number of international students enrolled in publicly funded tertiary education only

Appendix C: Comparative Table of Competitive Advantages by (alphabetical) Country

Country	Student visa <u>not</u> required for study less than 3 months' duration	English-language provision on offer	Foundation, pathway or transitional programmes available	Low-cost tuition fees (up to US\$5,000 per year)	Moderately-priced tuition fees (US\$5,000 – US\$15,000)	Opportunity to work up to 16 hours per week during term time studies	Low living costs	Moderate living costs	Employment opportunities at least in certain disciplines following graduation
Australia									
Canada									
China						Information not readily available			Information not readily available
France *									
Germany *									
Japan									
Malaysia						Information not readily available			Information not readily available
New Zealand									
Singapore									
United Kingdom									
United States									

* EU citizens do not require a visa to study in Germany and France

Resources

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