# International student recruitment: policies and developments in selected countries

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# Table of contents


| | | |
|---|---|---|
| **About the authors** | | **4** |
| **Acknowledgements** | | **4** |
| **Summary** | | **5** |
| **Acronyms** | | **7** |
| **Chapter 1** | **Introduction** | **9** |
| 1.1 | Focus of the Study | 9 |
| 1.2 | Factors influencing international student mobility | 10 |
| **Chapter 2** | **National recruitment policies in recruiting countries** | **16** |
| 2.1 | The Netherlands | 16 |
| 2.2 | France | 20 |
| 2.3 | Germany | 22 |
| 2.4 | Switzerland | 27 |
| 2.5 | The United Kingdom | 30 |
| 2.6 | The United States | 34 |
| 2.7 | Canada | 37 |
| 2.8 | Australia | 39 |
| 2.9 | Singapore | 42 |
| 2.10 | Malaysia | 44 |
| 2.11 | China | 46 |
| 2.12 | Conclusion | 48 |
| **Chapter 3** | **National student mobility policies in target recruitment countries** | **59** |
| 3.1 | Brazil | 59 |
| 3.2 | China | 60 |
| 3.3 | India | 62 |
| 3.4 | Indonesia | 63 |
| 3.5 | Mexico | 65 |
| 3.6 | Russia | 67 |
| 3.7 | South Korea | 68 |
| 3.8 | Taiwan | 70 |
| 3.9 | Thailand | 71 |
| 3.10 | Vietnam | 73 |
| 3.11 | Argentina | 74 |
| 3.12 | Chile | 76 |
| 3.13 | Colombia | 78 |
| 3.14 | Egypt | 80 |
| 3.15 | Conclusion | 82 |
| **Chapter 4** | **Conclusions and Implications** | **85** |
| **References** | | **89** |

# About the authors

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# Summary

This report aims to provide an overview of international student recruitment and mobility policies by national governments in key recruiting and recruitment countries, and to identify the emerging implications of these developments for the Netherlands. The report is targeted at Dutch early-career policymakers at national and institutional levels, early-career marketing officers and researchers in the area of international student mobility.

The report consists of four chapters. Chapter 1 sets out the focus of this study and gives an overview of the main factors that influence international student mobility. Chapter 2 analyses national government policies and strategies for international student recruitment in eleven countries that are active in international student recruitment. These countries include the Netherlands, France, Germany, Switzerland, the United Kingdom, the United States, Canada, Australia, Singapore, Malaysia and China. Chapter 3 describes national student mobility policies and the local context in recruitment countries that are (or may become) particularly important to the Netherlands. These countries are Brazil, China, India, Indonesia, Mexico, Russia, South Korea, Taiwan, Thailand, Vietnam, Argentina, Chile, Colombia and Egypt. Chapter 4 offers the conclusions of this study.

The main conclusions of this report are the following.

1. The number of countries that are actively involved in international student recruitment has grown considerably. Many countries that previously only sent students abroad, have started to improve the quality of their own higher education and developed strategies and policies to attract international students themselves. These countries include China, South Korea, Mexico, and – to a lesser extent – Russia, Taiwan, Thailand, Brazil, Argentina and Chile.

2. More and more countries are competing for students from the same group of countries. The target countries of the relatively new recruiting countries are often within their own (Asian, Latin American, or North African) region, and are often the same as the main target recruitment countries of the big players in the global recruitment market. In addition, several countries aim to become top destination countries for higher education and research in their respective regions (e.g., Switzerland and China) or international higher education hubs (e.g., Singapore, Malaysia and Thailand) that will help raise their international economic competitiveness.

3. The division between recruiting and target recruitment countries is blurring since several countries are key recruitment countries for other nations, while they are also actively recruiting foreign students themselves.

4. Global international student mobility flows are changing in two ways in particular. First, with the economic and political balance of power shifting east, mobility patterns are beginning to change in this direction as well. Second, the regionalisation of international student mobility is accelerating. This means that more and more students who study abroad do so in another country within their own region.

5. Global competition for students (and especially for the best among them) will likely intensify in the future. Competition does not only take place globally, but also regionally and nationally. Since international mobility patterns are not fixed, countries that currently manage to attract a high number of international students should not take those levels of incoming student mobility for granted. Continued efforts to recruit and attract students are necessary, as are high-quality education programmes and support mechanisms for international students, since student choices for study destinations are based on the perceived added value of studying abroad in a particular country / at a specific institution.

6. International student recruitment is increasingly being integrated into broader forms of international higher education cooperation, such as international double degree programmes and bilateral research collaborations.

7. Given the importance of the European Higher Education Area and the economic importance of European countries for the Netherlands, Dutch higher education recruitment and collaboration benefits from a broad focus on Europe and a targeted focus outside of Europe.

8.International student recruitment is most effective when there is – at the national level – a focused international student recruitment strategy that is integrated with foreign economic and cultural policy and consistently pursued over a longer period of time.

9.Integration of international recruitment strategies into bilateral research collaboration, supported by scholarships for international master's and PhD students, will likely result in increased recruitment at postgraduate levels.

# Acronyms

| | |
|---|---|
| AAIEP | American Association of Intensive English Programmes (United States) |
| AGCI | *Agencia de Cooperacion Internacional de Chile* (Chilean Agency for International Co-operation) |
| ASEAN | Association of Southeast Asian Nations |
| AUCC | Association of Universities and Colleges Canada |
| AU$ | Australian Dollar |
| AusAID | The Australian government's overseas aid programme |
| BRIC | Brazil, Russia, India and China |
| CAPES | *Coordenação de Aperfeiçoamento de Pessoal de Nível Superior* (Federal Agency for Support and Evaluation of Graduate Education, Brazil) |
| CA$ | Canadian Dollar |
| CHF | Swiss Franc |
| COLFUTORO | The Foundation for the Future of Colombia |
| CONACyT | *Consejo Nacional de Ciencia y Tecnología* (National Council of Science and Technology, Mexico) |
| CONEAU | *Comisión Nacional de Evaluación y Acreditación Universitaria* (National Commission for Evaluation and University Accreditation, Argentina) |
| CPT | Curricular Practical Training (United States) |
| OPT | Optional Practical Training (United States) |
| CRUS | *Conférence des Recteurs des Universités Suisses* (Rectors' Conference of the Swiss Universities) |
| CSC | China Scholarship Council |
| DAAD | *Deutscher Akademischer Austausch Dienst* (German Academic Exchange Service) |
| DIKTI | Direktorat Jenderal Pendidikan Tinggi (Ministry of National Education, Directorate General of Higher Education, Indonesia) |
| ECTS | European Credit Transfer and Accumulation System |
| EEA | European Economic Area |
| EEP | Educational Exchange Programme (India) |
| EHEA | European Higher Education Area |
| ESL | English as a Second Language |
| ESOS Act | Education Services for Overseas Students Act (Australia) |
| ETH Zürich | Swiss Federal Institute of Technology Zurich |
| EU | European Union |
| EUCOR | Confederation of Upper Rhine Universities (French-German-Swiss) |
| FCS | Federal Commission for Scholarships for Foreign Students (Switzerland) |
| FSL | French as a Second Language |
| GCE A-Level | General Certificate of Education, Advanced Level |
| GCE O-Level | General Certificate of Education, Ordinary Level |
| GKS | Global Korea Scholarships (South Korea) |
| IB | International Baccalaureate |
| ICETEX | *Instituto Colombiano de Crédito e Estudios Técnicos en el Exterior* (Colombian Institute for Educational Loans and Technical Studies Abroad) |
| ICT | Information and Communication Technology |
| IDRC | International Development Research Center (Canada) |
| IIE | Institute of International Education (United States) |
| IT | Information Technology |
| IND | Immigratie- en Naturalisatiedienst (Immigration and Naturalisation Service, The Netherlands) |
| JRFs | Junior Research Fellowships (India) |
| MENA | Middle East and North Africa |
| MERCOSUR | *Mercado Común del Sur* (Common Market of the South) |

| | |
|---|---|
| NAFSA | Association of International Educators (North America) |
| Neso | Netherlands Education Support Office |
| Nuffic | Netherlands organisation for international cooperation in higher education |
| OFII | *L'Office Français de l'Immigration et de l'Integration* (French Immigration and Integration Office) |
| OAS | Organisation of American States |
| OECD | Organisation for Economic Cooperation and Development |
| OIS | Organisation of Iberian States |
| PhD | Doctor of Philosophy |
| PMI2 | The second round of the Prime Minister's Initiative for International Education (UK), 2006-2011 |
| SAR | Special Administrative Region (Hong Kong, China) |
| SEP | *Secretaría de Educación Publica* (Secretary of Education, Mexico) |
| SER | State Secretariat for Education and Research (Switzerland) |
| SOL | Skilled Occupation List (Australia) |
| S$ | Singaporean Dollar |
| TEQSA | Tertiary Education Quality and Standards Agency (Australia) |
| TNE | Transnational education |
| UAE | United Arab Emirates |
| UGRAD | Global Undergraduate Exchange Program (United States) |
| UK | United Kingdom |
| UKIERI | The UK-India Education and Research Initiative |
| UNESCO | United Nations Educational, Scientific and Cultural Organisation |
| US | United States |
| USSR | Union of Soviet Socialist Republics |
| US$ | US Dollar |
| VET | Vocational Education and Training |

# Chapter 1: Introduction

## 1.1 Focus of the study

To formulate better recruitment strategies and attract sufficient numbers of high-quality students from abroad, Dutch policymakers and higher education institutions need to be well aware of policy developments in other recruiting and recruitment countries. This report aims to inform Dutch early-career policymakers at national and institutional levels by providing policy-relevant information and analysis of local developments in key countries. The report also provides a useful knowledge basis for two other target groups: early-career marketing officers at Dutch higher education institutions, and researchers in the field of international student mobility issues.

This study has two aims:

i. to offer an up-to-date overview of international student recruitment and mobility policies and strategies pursued by national governments in key recruiting and recruitment countries, and
ii. to benchmark Dutch policies against those of other countries, and look at the emerging implications of these developments for the Netherlands (e.g. by exploring possibilities for the Netherlands to recruit not just more, but also better qualified international students – i.e. more students at master's and PhD levels, instead of lower-qualified students at the bachelor's level).

This report consists of four chapters. This first chapter sets out the focus of this study and gives an overview of the main factors that influence international student mobility in general, and to the Netherlands in particular. These factors are described as an introduction to the country chapters, as national policy instruments can form "pull" and "push" factors to attract certain groups of international students or to discourage them to come. Other pull and push factors are related to national geographical, historical or social contexts.

Chapter 2 analyses national government policies and strategies for international student recruitment in eleven countries that are very active in international student recruitment. These countries include the Netherlands, France, Germany, Switzerland, the UK, the US, Canada, Australia, Singapore, Malaysia and China. From the European countries, France, Germany and the UK were selected because they are among the main international student destinations worldwide; Switzerland was chosen because of its similarity to the Netherlands in terms of its size and its higher education system, and because the country has developed interesting policy strategies. The US and Australia are reviewed because they are among the countries in the world that receive the highest numbers of international students. Canada, Singapore, Malaysia and China were selected because they have become – or are becoming – major recruiting countries and international study destinations, often providing lower-cost higher education programmes compared with the US. At the same time, the growing number of international students in Singapore, China and Malaysia is also a result of their growing economies and of the international branch campuses established in these countries by foreign universities, particularly from the US, the UK and Australia.

Chapter 3 describes national government student mobility policies and the local context in recruitment countries that are particularly important to the Netherlands. This chapter focuses on the ten countries[1)] that were identified by the Dutch government as priority countries for recruitment, and where Nuffic has established Netherlands Education Support Offices and Desks. These countries are Brazil, China, India, Indonesia, Mexico, Russia, South Korea, Taiwan, Thailand and Vietnam. In addition, Argentina, Chile, Colombia and Egypt are analysed because these countries may also be (or become) interesting recruitment markets for Dutch higher education institutions.

China is analysed in two chapters. In Chapter 2, China is analysed as one of the main countries that are actively recruiting international students, and the focus is on the recruitment policies of the Chinese government. In Chapter 3, China is analysed as one of the key source countries for student recruitment, and the focus here is on broader factors that influence not only incoming, but also outgoing student mobility.

1) For reasons of readability, this report refers to the ten Nuffic Neso countries and territories as "countries", although in fact the reference is to "countries and territories".

Chapter 4 offers the conclusions of this study and considers the potential implications of the policy contexts and developments in general, and for Dutch student recruitment policies and practices in particular.

Please note that the country data were collected in early 2011 and checked by local experts in June 2011. Some policy details and situations may have changed since then.

While this report focuses on national government policies for international student recruitment, the next section gives an introduction to the broader factors that influence international student mobility, since these factors all influence mobility directions. Some of these factors consist of national policy instruments. Other factors relate to other aspects, such as national or regional socio-economic or cultural contexts.

## 1.2 Factors influencing international student mobility

International students have different reasons to choose a particular course programme and study location (country, region or city). To better understand the motivations of these students and develop more effective recruitment policies, it is vital to know how students decide on a particular study location and course programme, and which factors led them in this choice. With respect to the choice of location, the academic literature mainly talks about the "push" and "pull" factors. These factors can apply at the level of individual students, but can also be related to higher levels such as characteristics and policy measures of cities, regions, countries or indeed continents or supranational organisations (e.g. the European Union and the European Higher Education Area).

Given the growing international competition between countries for high-quality students, it has become increasingly important to gain a better understanding of factors at the higher level that influence national and international policies and policy contexts. However, in terms of study choices, research has largely focused on domestic students. Hence, the available literature on how international students arrive at their decisions on study destinations, and on the factors that influence those decisions, is limited. Nonetheless, this section aims to use the available literature to present a holistic overview of the main factors that influence international student mobility and the choice of destination countries. It is presumably these factors that national governments and higher education institutions need to take into account when formulating and implementing recruitment policies.

### 1.2.1 Theoretical perspective on the selection process and factors that influence international students

Research on students' choices of destination countries and institutions can be divided into studies that focus on the decision-making process and those that focus on student motivations to study abroad. Research that focuses on the students' selection process is well established. In most cases, that process is viewed as containing multiple stages in which information is collected and analysed, and where decisions are made.[2)] The main difference between the research models is the sequence of the information gathering stages and the ways in which they overlap. With regard to the selection process among international students, Chen's Synthesis Model seems to have the most face validity.[3)] This study process model consists of the following three interplaying stages:

1. A predisposition stage, in which students asses their personal needs, collect information on studying abroad, and decide to do so.
2. A search/selection/application stage, in which students gather information on available alternatives and in the end select, take a decision and submit one or more applications.
3. A choice stage, in which students, after receiving offers of admission, reconsider the available alternatives (i.e. programme, institution, city, country, visa requirements, costs, etc.) and take a final decision.

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2) A extensive analysis of the different models for domestic students can be found in Vossensteyn, J.J. (2005). *Perceptions of Student Price-Responsiveness: A Behavioural Economics Exploration of the Relationships between Socio-Economic Status, Perceptions of Financial Incentives and Student Choice*, PhD Dissertation, University of Twente, Enschede. For international students refer to: Fowler, J.E. (2009). *Lists and Learners: The Importance of University Rankings in International Graduate Student Choice*, Master Dissertation, University of Oslo.

3) Chen, L.H. (2007). East-Asian Students Choice of Canadian Graduate Schools, *International Journal of Educational Advancement*, Vol.7, pp.271-306.

The studies focusing on student motivation to study abroad are more relevant for this particular report. These studies try to explain the factors influencing students to enrol in higher education and select a particular higher education institution and course programme. These are the so-called "student choice" models. The available research focusing on domestic students has led to three different models: [4)]

- Status-attainment models (also called sociological models),
- Economic models (also called econometric models), and
- Information-processing models (also called the combined models).

The main difference between these models is in their focus on particular influencing factors.[5)] In general, the status-attainment models focus on intrinsic factors[6)], the economic models focus on extrinsic factors , and information-processing models use a combination of intrinsic and extrinsic factors. The applicability of these models for international students is limited, however, because many more factors can influence their choice process. This inherently means that student choice models for international students have to be more complex than the domestic student choice models.

Several studies try to fill this gap by designing student choice models specifically for international students.[7)] What most of these models have in common is their adoption of the push and pull theory, which attempts to explain the factors affecting the decision-making of international students. The theory argues that there are basically two forces at play: push factors and pull factors. The push factors "operate within the source country and initiate a student's decision to undertake international study", while the pull factors "operate within a host country to make that country relatively attractive to international students".[8)] Note that in some cases a push factor can also be a pull factor, and vice versa. Moreover, if the country of origin does not have certain push factors, this could mean that students are more keen on staying in that country. The same applies to pull factors of countries, which can also be regarded as blocking factors. Strict immigration policies are a clear example of this.

The push and pull theory is applied in the following sections of this chapter to give an overview of the push and pull factors that can be at play. Where possible, empirical research on the most important factors is mentioned. Nonetheless, it should be noted that the push and pull models are rarely tested empirically. Moreover, among the models that have been empirically tested, the adopted methodology (i.e. the questionnaire, the sample taken, and included factors) differs substantially,[9)] for example in terms of the included nationalities of respondents. The Mazzarol and Soutar study involves 2,485 students from Taiwan, India, China and Indonesia, while the Chen study is based on 140 students from China, Hong Kong, Japan, Korea and Taiwan. These differences mean that there are serious limitations to the extent the empirical results can be compared and generalised.

### 1.2.2 Push factors encouraging international students to study abroad

Domestic factors encouraging international students to study abroad can be push factors. Push factors can roughly be divided into personal push factors and environmental push factors. The former relate to the personal characteristics, preferences and motivations of individual students. The environmental push factors relate, for instance, to national characteristics.

Not much is known about the personal push factors of international students. This is quite logical, considering the large diversity of the international student group and the consequence this has for the extent to which results can be generalised. What we do know from existing research on domestic students is that students can be influenced by their parents' socio-economic status, their relatives' level of education and their own academic ability.[10)]

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4) Hossler, P., J. Schmidt, and N. Vesper (1999). *Going to College: How Social, Economical and Education Factors Influence the Decision Students Make*. Baltimore: The Johns Hopkins University Press and Vossensteyn, J.J. (2005), op.cit.

5) Intrinsic factors are related to personal growth in terms of gaining knowledge and skills, achieving personal development and mental growth (Boer, H. de, R. Kolster, and H. Vossensteyn (2010). Motives Underlying Bachelors–Masters Transitions: The Case of Dutch Degree Stackers, *Higher Education Policy*, Vol.23, pp.381–396.)

6) Extrinsic factors are related to the economic utility of the education in terms of higher job status, prestige, employment opportunities and future earnings (Boer, H. de, R. Kolster, and H. Vossensteyn (2010), op.cit.

7) See Fowler, J.E. (2009), op.cit., for and extensive discussion of these particular theoretical models.

8) Mazzarol, T. and G.N. Soutar (2002). 'Push-Pull' Factors Influencing International Student Destination Choice, *International Journal of Educational Management*, Vol.16(2), p.82.

9) The empirically tested models are the "Push-Pull" model (2002) of Mazzarol and Soutar, and Chen's (2007) "Synthesis Model".

10) Vossensteyn, J.J. (2005), op.cit.

Other important influential sources that can convince students to study abroad are family members (especially if they live abroad or have studied abroad themselves), other students, friends, professors, educational agents, alumni, sponsors and employers. Note however that the influence of these sources can be assumed to differ depending on the nationality and maturity of the students.[11)]

According to Chen's Synthesis Model, the three most important influential sources for international students are their family / spouse, other students or friends, and professors. Chen found that the most important motivations to study abroad are the wish to acquire an advanced degree for personal satisfaction or to improve foreign language skills, and the importance of advanced degree for the student's future career and salary level. In addition, students find it valuable to have an advanced degree from a Western country.

Besides these personal push factors, there are push factors that relate to the environment. Although better documented, these factors are rarely tested empirically. They can include the following:

- The unavailability of, and difficult access to, higher education (programmes) and/or cutting edge research (facilities),
- The value of a national higher education degree on the domestic labour market (mismatch of acquired and needed skills),
- A low value of a national higher education degree and/or work experience (on the domestic labour market),
- A low quality and reputation of the domestic higher education and research,
- High recognisability, acceptance and perceived value of foreign degrees by domestic employers and higher education institutions,
- Cultural, economic, educational, linguistic, historical, political or religious ties to another region, country, city and/or institution,
- The demographic, economic and/or political climate within the country of origin. Note that both a high and low performing economy can be push factors (e.g. a high performing economy can give more students the financial means to study abroad, whereas a low performing economy can lead to a shortage of jobs, encouraging students to study abroad). The same applies to a stable or unstable political situation, and to a growing or declining population.
- The attractiveness of the environment in the country of origin (e.g. climate),
- The high availability of information of possible hosting regions, countries, cities and/or institutions,
- The level of domestic tuition fees and living costs, and
- Favourable financial (i.e. scholarships) and emigration policies in the country of origin.

The empirical results of research into the push factors present a mixed picture. This is mostly due to the incomparability of the Mazzarol & Soutar and Chen studies. A general picture can be drawn, however, from a less extensive study by McMahon,[12)] which suggests that the lower quality and prestige of local programmes / institutions and the unavailability of desired programmes in the home country are important push factors for studying abroad. It is clear, however, that more research is required in order to gain more detailed insight into the influence of specific environmental push factors.

### 1.2.3 Pull factors influencing international students to select a specific study destination

The factors described in the previous section can help "push" a student to study abroad. We will now turn to the factors that can "pull" a student to a particular study destination. First, an overview of the main pull factors is given below, followed by actual empirical results from theory-based studies.

The main pull factors of a country as a study destination are the following:

- The availability of information on the country and its higher education institutions, existing cultural / economic / educational / historical / linguistic / religious / strategic linkages, and active promotion or recruitment policies,
- The quality and reputation of education in the country (for instance, but not only, through rankings of institutions within a country), and the level of academic freedom,

11) Determining the exact influence of each of these sources would require extensive research among multiple countries.
12) McMahon, M. E. (1992). Higher Education in a World Market, *Higher Education*, Vol.24(4), pp.465-482.

- Mutual recognition of degrees/qualifications (by the host country and the domestic country),
- Costs of higher education and living in a country (tuition fee, availability of financial aid, travel expenses, living costs),
- Governance of higher education institutions (public vs. private),
- Safety levels within the country (crime rate, racial discrimination),
- Internationalisation of a country (number of foreign students, availability and diversity of international programmes, stringency of immigration policies),
- The living, study and work environment of a country (climate, research facilities, ambiance, employment and immigration opportunities/regulations during and after study, demographic growth/decline), and
- Social and geographical linkages (friends/relatives living or studying in same country, geographical proximity).

One of the first research studies focusing on national pull factors was done by McMahon.[13] This study, which focused on pull factors of the US for students from eighteen Third World countries, found that the relative size of the US economy and the concentration of trade with the US (i.e. economical linkage) were positive pull factors. The amount of foreign assistance and institutional support was found not to have a pulling effect. The importance of economic pull factors was also found in a study by Kolster that measured the academic attractiveness of countries.[14] This study concluded that additional pull factors are related to the diversity of the student population (i.e. social linkage) and the overall reputation of a higher education system (as measured by the number of ranked institutions in international league tables[15]). These two studies focused exclusively on characteristics of countries.

The other studies focus more on the pull factors that influence students in choosing a particular country. For respondents in the Mazzerol and Soutar study (coming from Taiwan, India, China and Indonesia), the five most important factors for deciding to study in a particular host country were the quality of its education, the fact that the qualifications of the host were recognised at home, the ease of obtaining information on the host country, the reputation of institutions in the host country, and knowledge of the host country. The Chen study indicates that environmental factors (particularly the perception of the country as a safe place to study) were the most important pull factors of Canada. The next set of important pull factors were the positive influence of a Canadian degree on future employment prospects, the ease of the visa process, a lower tuition fee and Canada's proximity to the US.[16] Another notable finding in the Chen study is the difference in importance of the pull factors between the types of study in which the students were enrolled. Factors related to study costs and future employment prospects were found the be more important for students enrolled in professional postgraduate programmes.

From the above it can be concluded that the most important pull factors of a country are a high quality and good reputation of education, and a good knowledge and student awareness of the destination country. This means that other factors (such as those relating to tuition fees and living costs, and social and geographical linkages) are less important factors. Nevertheless, which factors are found to be more important depends heavily on the level and type of study the student is enrolled in (bachelor's, master's, PhD; and research or professional oriented) and his or her country of origin.

The main pull factors of a city as a study destination are the following:

- Knowledge and awareness of a city (e.g. through the availability of information, cultural / economic / educational / historical / linguistic / religious / strategic links, and active promotion or recruitment policies),
- The quality and reputation of education in a city (e.g. through rankings of institutions within that city),
- Costs of higher education and living in a city (tuition fees, availability of financial aid, travel expenses, housing costs),
- Safety levels within that city (crime rate, racial discrimination),
- Levels of internationalisation of a city (number of foreign students, availability and diversity of international programmes),

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14) Kolster, R. (2010). *Academic Attractiveness of Countries to students: Explaining and Measuring a Countries' Academic X Factor*, University of Oslo. URL: http://www.duo.uio.no/publ/pfi/2010/102886/AcademicxAttractivenessxofxcountriesxxR.xKolster.pdf.

15) The main international rankings are the Academic Ranking of World Universities (ARWU, also known as the Shanghai ranking and SJTU Ranking), the QS World University Rankings (previously known as the THE / QS ranking) and the Times Higher Education ranking.

16) The latter indicates that for a large percentage of respondents the first study choice destination was in fact the US.

- The living, study and work environment of a city (climate, research facilities, ambiance, employment opportunities during and after study, demographic growth/decline), and
- Social and geographical linkages (friends/relatives living or studying in same city, geographical proximity).

Research on pull factors of cities for international students is scarce. Cubillo et al.'s Model of International Students' Preferences does mention specific city factors, although this model is not tested empirically.[17] What we do know comes from the Chen study, which found that overall, international postgraduate students were concerned about safety and internationalisation of the city in which they decided to study. Chen also found that business students rated factors related to the location of the university and the potential for future employment in the same city as more important than students enrolled in research programmes. Besides these results, no other research was found on pull factors of cities. Hence, the pull factors that influence international students at this level remain largely unknown.

The main pull factors of a higher education institution are the following:

- A wide knowledge and awareness of an institution among students (good and available information, educational / historical / strategic links between the host institution and a previous education institution, linguistic and religious linkages, and active promotion or recruitment policies of the institution),
- A high perceived quality and reputation of the institution and its education and research (e.g. as expressed in rankings of the institution, its programmes/faculties and its academic staff),
- Recognition of degrees or other qualifications by the host institution and country of origin, and a high marketability of the degree/qualification,
- The costs of higher education (tuition fee level, the availability of financial aid, travel expenses, and living costs),
- The nature of governance and administrative procedures of a higher education institution (public vs. private, academic freedom, the speed of application procedures and student satisfaction with institutional communication),
- The safety level within the institution / on campus (crime rate, discrimination levels),
- The level of internationalisation of an institution (number of international students and staff, and the availability and diversity of international programmes),
- The living, study and work environment of an institution (ambiance, study rooms, on-campus employment opportunities during and after the study, and the quality of ICT and research facilities), and
- Social and geographical links (friends/relatives living or studying at the same institution, geographical proximity).

Compared with the other levels, the pull factors that operate at the institutional level have been researched more extensively. This is perhaps because at this level, it is easier to adjust features of the institutions to meet the international students' requirements. It is also important to know the exact pull factors for institutions, so that they can adjust their recruitment policies. It would go beyond the scope of this chapter to discuss all the empirical research found for this level. We do know, however, that the outcomes are largely in line with the studies by Mazzerol & Soutar and Chen. The former study indicates that, as compared with domestic students, important pull factors for international students to choose a particular institution relate to:

- The quality and reputation of the institution,
- The recognition of the institution's qualification (in the student's home country),
- The international strategic alliances of the institution,
- The quality of the institution's staff, and
- The size of the alumni base and the existing international student population of the institution.

The Chen study used more factors and thus gives a more detailed picture. Chen found that the factors related to quality and reputation were the most important. Furthermore, the reputation, quality and ranking of the university at large was found to be more important than the reputation, quality and ranking of the programme. The ranking

[17] Cubillo, J. M., J. Sanchez, and J. Cervino (2006). International Students Decision-Making Process, *International Journal of Educational Management*, Vol.20(2), pp.101-115.

and reputation of a university were particularly important for students enrolled in professional programmes. This is because of their focus on a good return of investment. The next important set of pull factors relate to the funding and costs of the education at the selected institution. These factors were found to be more important than the environmental factors of the institution.

The above results suggest that the institutional pull factors for an institution are largely in line with the national pull factors. Hence, also here, the pull factors related to the quality and reputation of the institution seem to be the most important factors pulling international students to an institution. One notable difference however is that at the institutional level, the cost of higher education plays a more substantial role. The specific characteristics of the institution, such as the overall level of internationalisation, are also more important at the institutional level. As previously noted, these outcomes are a generalisation; actual outcomes may differ depending on the student's nationality and level and type of study (bachelor's, master's, PhD and research or professionally oriented).

### 1.2.4 Policy implications of the push and pull factors

It can be assumed that the push and pull factors at all the identified levels (national, city and institutional) influence study mobility patterns around the globe. Hence, internationalisation and international student mobility policies of active sending and active receiving countries should to some extent reflect and affect the factors that push or pull students to and from the countries concerned.

What we expect to see in recruitment strategies of countries that aim to attract international students is that national strategies capitalise on specific national pull factors, and also form new pull factors through new policy instruments. An example of the former is targeted marketing through advertisements that express the high reputation of domestic higher education programmes. An example of the latter is offering new scholarship programmes. Chapter 2 will show to what extent national strategies form, or make use of, pull factors.

The sending countries are at the other end of the equation, where the push factors can be expected play an active role. It is assumed that these factors are taken into account in national student mobility policies of the sending countries. It is also interesting to see to what extent these countries use the pull factors as a way to attract both international and home students. This would mainly apply to Asian countries, which in the last decade have seen substantial economic growth and are becoming more attractive as study destinations themselves. We assume that the state of the country, in terms of economic growth and focus on improvement of the academic infrastructure, is reflected in its mobility policies. A practical example of this are policies that give home students a (financial) incentive to study abroad (e.g. in a particular country) and also to return home afterwards. Other policies can focus on improvement of the initial push factors, such as improvement and increased availability of higher education courses. Chapter 3 looks at the international mobility policies of key target countries for recruitment, and to what extent governments in these countries are making it more attractive for students to study at home.

First though, Chapter 2 will analyse national recruitment policies and factors that influence incoming student mobility in key recruiting countries.

# Chapter 2: National recruitment policies in recruiting countries

## 2.1 The Netherlands

There are approximately 60,000 international students in the Netherlands, corresponding to 8% of all students in Dutch government-funded higher education (2010/11).[18] Of these, 52,000 are enrolled in a full degree programme. Approximately 77% of all international students in the Netherlands are enrolled at bachelor's level, and only 22% at master's level. Germany, China and Belgium are the main countries of origin.

### 2.1.1 National policy strategies for international student recruitment

In the Netherlands, as in France and Germany, national student recruitment and mobility policies have been strongly influenced by Bologna Process-related policies. The Bologna Process has also increased the need for participating countries to cooperate in higher education and international student exchange.

The Dutch Ministry of Education, Culture and Science has adopted the following strategies for international student recruitment[19]:

1. To improve the quality of Dutch higher education and research institutes, so that they will rank among the best in the world and are attractive to international students and PhD candidates.
2. To strengthen the international profile of Dutch universities and research institutes by developing a coherent higher education, research and innovation policy, and to promote, in the international arena, the high quality profile and distinctive features of Dutch higher education, and of the Netherlands as an internationally oriented country.
3. To help strengthen the European Higher Education Area (EHEA) as a means to promote Dutch higher education both within and outside of Europe.
4. To encourage a more international orientation of Dutch higher education institutions.
5. To stimulate international "brain circulation", i.e. knowledge exchange through more outgoing and incoming student mobility. At the same time, a brain drain from developing countries must be prevented. A 2004 policy paper notes that international students can particularly help increase enrolments in the sciences and technical areas where Dutch HEIs are experiencing shortages.
6. To remain internationally competitive, the Dutch labour market needs more highly qualified people. Talented international students who stay in the Netherlands after graduation can fill part of the urgent need for highly qualified professionals. Knowledge migration rules and regulations should facilitate this.
7. To expand and improve the quality of support services for international students in the Netherlands, such as student accommodation and immigration opportunities for students from outside of the European Economic Area (EEA).

This broad strategic agenda serves as a general guideline; individual higher education institutions in the Netherlands are free to formulate their own vision and policy strategies.

The Dutch government has identified ten priority target countries for international student recruitment: Brazil, China, India, Indonesia, Mexico, Russia, South Korea, Taiwan, Thailand and Vietnam. In these countries, Nuffic has established Nuffic Netherlands Education Support Offices and Desks (Nuffic Nesos).

[18] Nuffic (2011). Mapping Mobility: International Mobility in Dutch Higher Education. The Hague: Nuffic.

[19] Ministry of Education, Culture and Science (2004), Koers op Kwaliteit, van Marge naar Mainstream. Internationaliseringsbrief hoger onderwijs; Ministry of Education, Culture and Science (2008) Internationaliseringsagenda: Het Grenzeloze Goed. URL: http://www.rijksoverheid.nl/documenten-en-publicaties/rapporten/2010/08/12/internationalisation-agenda-het-grenzeloze-goed-the-boundless-good.html; Ministry of Education, Culture and Science (2009), Internationale positionering van de Nederlandse onderwijs- en kennisinstellingen. Aanvullende actielijnen in het kader van de internationaliseringsagenda 'Het Grenzeloze Goed'.

### 2.1.2 National policy instruments for international student recruitment

*Tuition fees & scholarship opportunities*

Dutch higher education institutions may charge full-cost tuition fees to non-EU students, although there are some institutions that do not do so for all of their programmes. Non-EU tuition fees range from approximately € 5,200 to € 9,600 for bachelor's programmes and from € 10,000 to € 20,000 for master's programmes. Compared with most other European countries, the Dutch fees are high (see later sections on other European countries).

At the time of writing, no other national, publicly funded scholarship scheme is available to international students (except for the EU-funded Erasmus scholarship programme). In 2006 the Dutch government introduced the Huygens Scholarship Programme to enable high-quality bachelor's and master's students from all countries in the world (and PhD candidates from EU Member States) to study in the Netherlands (and to enable talented Dutch students to study abroad). In 2009, there were 249 non-Dutch Huygens Scholarship recipients. In the Spring of 2011, the government announced its decision to cancel this programme in connection with austerity measures necessitated by the economic downturn.

The Dutch government has bilateral scholarship programmes in place with, or for, specific countries or regions. Under one such agreement, the Netherlands and China each make 25 scholarships available to citizens of the other nation to study in their country. The Dutch government also offers scholarships to students from the Middle Eastern and North African Scholarship programme; 110 such scholarships were awarded in 2009.

*Student visa and immigration*

In the near future[20], amendments to the Dutch law on modern migration policy are likely to come into effect, which stipulate that on arrival in the Netherlands, non-EU students will receive a student visa for the duration of their studies plus three months. Dutch higher education institutions are required to monitor and inform the Dutch Immigration and Naturalisation Service (IND) about the study progress of all student visa holders. These students need to gain a minimum of 50% of their annual course credits every year to be allowed to stay in the country and continue their studies. For students, bureaucracy will be reduced since they will no longer have to pay a separate fee to renew their student visa at the end of the first year of study. At the time of writing (July 2011), visa costs for non-EU students amount to € 600, which is expensive compared with most European countries. The required annual visa renewal costs € 150. If students decide to move to another Dutch higher education institution after having made their initial visa application, they are required to pay a corresponding € 600 fee for a new visa.

*Opportunities for employment during and after study*

International students that study in the Netherlands on a student visa are legally allowed to undertake paid work for up to ten hours a week during term time and 40 hours a week during holiday periods, provided that they have obtained a separate work permit. For students from the European Union (EU) / European Economic Area (EEA) who study in another country within the EU/EEA, normally there are no employment restrictions.

On completion of their officially recognised studies in the Netherlands, non-EU students are allowed to stay in the Netherlands for one more year to look for a job as a "knowledge migrant".[21] If these graduates find employment in the Netherlands with a gross salary of at least € 26,376 a year (this threshold is re-indexed annually), they are allowed to stay in the Netherlands. Young non-EU workers that have completed a master's or PhD degree at an institution featuring in the top 150 of the Times Higher Education or Shanghai Jiao Tong indexes can apply for a visa based on an admission scheme for "highly educated persons"[22]. Such visas are granted with reference to a points-based system, whereby graduates gain points if they have studied in the Netherlands before, are fluent in English or Dutch or hold a degree issued in a Bologna Declaration signatory country. Graduates are required to obtain a minimum of 35 points. PhD holders gain 30 points, whereas MA holders gain 25 points to start with. This visa will allow them to start their "Orientation Year for Graduates" in the Netherlands.

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20) At the time of writing (June 2011), the implementation date has not yet been determined.
21) This is the "Orientation Year for Graduates" scheme (in Dutch: *"zoekjaar afgestudeerde"*).
22) In Dutch: *"regeling hoogopgeleiden"*.

*Programmes taught in other languages*

The number of English-taught degree programmes offered by Dutch higher education institutions is among the highest in continental Europe. Over half of all degree and master's degree programmes are taught in English. In 2010/11 Dutch institutions offer more than 1,500 international programmes. Of these, nearly 850 are English-taught master's programmes and close to 250 are English-taught bachelor's programmes. These programmes are attractive to international students. A few Dutch institutions also offer some full degree programmes taught in German; these programmes are particularly aimed at German students.

*Transnational and collaborative degree programmes*

Accreditation of Dutch degree programmes that are offered abroad and of Dutch-foreign joint degree programmes has been possible since July 2010. These programmes, which can vary in length (including one and a half years to facilitate international collaboration), need to be accredited in the Netherlands. So far, only a few Dutch higher education institutions offer their own degree programmes abroad, and several institutions have developed Dutch-foreign joint degree programmes. Although it remains to be seen to what extent Dutch-foreign joint degree programmes will be created in the near future, they may contribute to the recruitment of international students.

In the future it will probably become legally possible for Dutch higher education institutions to open branches abroad where they offer Dutch-accredited degree programmes to students that may never have visited the Netherlands at all. This provision has already been included in the Dutch Higher Education and Research Act, but will not become legally effective until a later date as yet to be specified.

*Other policies for international student recruitment*

The Nuffic Neso offices and desks in the ten countries mentioned above promote Dutch higher education, "study in Holland" and Dutch-foreign institutional cooperation in these target countries. The Nuffic Neso offices also organise Holland Alumni activities and perform market research and analyses. Nuffic provides information for the generic promotion of studying in Holland through a Study in Holland website, a database of all international / English-taught programmes and courses offered by Dutch institutions, and a database of available scholarships. Nuffic also participates in education fairs around the world.

Dutch institutions have fully implemented the Bologna bachelor's-master's degree structure. Compatibility with the Bologna structure is seen as attractive to international students and can encourage incoming international student mobility, both for short and longer term periods (although Bologna structures in participating countries of course also make it easier for international bachelor's students to continue their master's studies in another Bologna signatory country.)

In the past five years, the Dutch government has encouraged the development of research master's programmes, graduate schools (where students can select their own research theme and supervisor), and internationally oriented "centres of excellence" at Dutch higher education institutions as instruments to promote Dutch higher education abroad and recruit high-quality international students. Foreign alumni who studied in the Netherlands are increasingly used (by Nuffic and by individual higher education institutions) to promote Dutch higher education abroad.

The competence-oriented degree programmes of the Dutch universities of applied sciences are a selling point that attracts considerable foreign interest. The Education Ministry encourages more intensive collaboration between the universities of applied sciences and domestic or foreign companies to better promote Dutch higher education abroad. Such collaboration can also help international graduates find employment in the Netherlands more quickly.

In February 2011, the Education Ministry announced its intention to allow graduates in specific fields from Dutch universities of applied sciences to use the titles of "master of arts" or "master of science". This measure, which is

to come into effect in the near future, will bring the degree titles of Dutch universities of applied sciences more in line with those awarded at research universities, and will make these degree titles more recognisable abroad and more attractive to international students.

Furthermore, the Dutch government is encouraging higher education institutions to develop a distinct educational "profile", focusing on specific fields, teaching or research, or regional or international collaboration. As part of this development, institutions can opt to develop a clear international profile in certain areas, which in turn may help to attract international students or staff.

A "Code of Conduct pertaining to international students in Dutch Higher Education" has been developed and implemented on the initiative of the Dutch government and the Dutch higher education institutions. This initiative is intended to guarantee the quality of higher education offered to international students. Only those institutions that sign the Code of Conduct may recruit international students and benefit from the services offered by the Nuffic Neso offices. Nearly all Dutch higher education institutions have signed the Code.

The Nuffic qualification of Chinese students starting their studies in the Netherlands is guaranteed by the Neso certificate that Chinese students obtain from Nuffic following a positive assessment of their English language proficiency and confirming the authenticity of educational degrees and diplomas.

There appear to be no policy strategies in the Netherlands which aim to balance the shares of EU and non-EU students in the country. Questions have recently been raised by Dutch Members of Parliament about possible ways to limit EU (and particularly German) student mobility to the Netherlands. These questions were raised in response to the huge imbalance in student mobility between the Netherlands and Germany and the resulting financial consequences.

### 2.1.3 The Netherlands' pull factors for international students

The Netherlands is attractive to international students mainly for the following reasons:

1. The Netherlands tends to be seen as an open, tolerant and relatively safe society.
2. The vast majority of Dutch master's degree programmes are taught in English.
3. Visa procedures have been simplified, although visa costs at entry remain high compared with most other European countries.
4. Non-EU graduates from Dutch higher education institutions are allowed to extend their residence permits for up to one year to look for employment in the Netherlands. Once they have been offered an employment contract at a required level of expected income, a longer-term employment visa will be issued.
5. Applied bachelor's programmes offer work placements (free from the restrictions on employment that is not study-related).
6. Several Dutch higher education institutions are strong in science and technology. The most popular subject areas of international degree students in the Netherlands are economics, language and culture, behaviour and society, health care and technology.
7. The number of collaborative (mostly double) degree programmes with universities abroad is increasing, and Dutch universities have developed links with PhD programmes, work placement projects and employment in China and India.

Next to these pull factors, there are factors in the Netherlands that may hinder international student recruitment in one way or another:

1. Non-EU tuition fees cover the full costs of teaching and are higher, on average, than those charged in other European countries (with the exception of the UK).
2. Opportunities for non-EU students to work during their studies are restricted. To undertake paid employment, students that are in the Netherlands on a student visa need a separate work permit, which allows them to work for a maximum of ten hours a week during term time and 40 hours per week during holidays.

3. Some Dutch university towns have a shortage of student accommodation.
4. Compared with several competing countries, the number of Dutch government-funded scholarships for talented international (non-EU) students is limited.

The fact that EU legislation allows non-EU students with a degree obtained in the EU to find employment in another EU country almost as easily as in the country where they have studied, means that non-EU students who graduated in another EU country may look for further study or work options in the Netherlands – but also that those with a Dutch degree may move to study or work in another EU country. This means that there are opportunities for Dutch institutions to attract non-EU students who studied in another EU country, but that they should also work hard to retain international bachelor's students and prevent them from moving abroad for their further master's studies.

## 2.2 France

In terms of international student numbers, France ranks fourth among the leading international student destinations in the world, behind the US, the UK and Germany.[23] Nearly 12% of all students in French higher education are from abroad. The top five source countries of international students in France are Morocco, China, Algeria, Tunisia and Senegal.

### 2.2.1 National policy strategies for international student recruitment

At the national level, France appears not to have published an explicit strategy for international student recruitment. The French Department of Foreign and European Affairs aims to raise awareness of international student mobility. In consequence, CampusFrance, the country's organisation for the promotion of French higher education abroad, is promoting information exchange between its staff in different parts of the world and enhancing strategies to encourage French-foreign student mobility and cooperation in higher education and research.

Initiated by the former French Immigration Ministry, CampusFrance supports international student mobility between sixteen Mediterranean countries by labelling higher education programmes of "excellence" and by allocating scholarships to high-quality students via the Mediterranean Office for Youth.

At the national level, France has not published a clear list of target recruitment countries or priority study areas to attract students to. Instead, France targets a wide range of countries. French recruitment initiatives particularly target countries with newly emerging markets and large potential student populations. CampusFrance's 2009 and 2010 activity reports reflect special attention to student recruitment from French-speaking Africa, North and South America, Asia (particularly China, India, Vietnam, Thailand and Indonesia), Egypt, Europe and the Middle East.[24] An explicit target is mentioned for Indian students: CampusFrance wishes to triple the number of Indian students in France within two years, particularly in long-term degree programmes (at the moment, Indian mobility to France largely concerns short and medium-term courses).[25] Given the location of CampusFrance's recruitment offices, Malaysia, Russia and Mexico are also important recruitment countries. In addition, recruitment efforts are undertaken in Brazil, South Korea and Taiwan. Government strategies focus on the recruitment of master's and doctoral-level students, and are aimed at increasing mobility within the scope of institutional partnerships.

### 2.2.2 National policy instruments for international student recruitment

*Tuition fees and scholarship opportunities*

French tuition fees for international students are low compared with other European countries. Public universities charge the same tuition fees to home/EU/EEA students and non-EU/EEA students. Annual tuition fees at public

23) OECD (2010) Education at a Glance 2010. Chart C2.3, p.315. URL: http://www.oecd.org/dataoecd/45/39/45926093.pdf.
24) CampusFrance (2010) Rapport d'activité 2009 (Paris: CampusFrance); CampusFrance (2011) Rapport d'activité 2010 (Paris: CampusFrance).
25) CampusFrance (2010) Rapport d'activité 2009 (Paris: CampusFrance), op.cit., p.6.

institutions are set by law. The fees for the 2010/11 academic year are € 174 for licence programmes, € 237 for master's programmes, € 359 for doctoral programmes and € 564 for programmes leading to the diplôme d'ingénieur. Additional fees may be charged for specific services. Tuition fees at private institutions – particularly schools of business and management – are generally higher, ranging from € 3,000 to € 10,000 annually.

The French government, through the Ministry of Foreign and European Affairs, makes an annual budget (€ 100 million in 2008) available for scholarships and international student grants.[26] The French Ministry of Higher Education and Research awards needs-based and affirmative-action grants to French citizens and certain groups of international students, notably those who have lived in France for at least two years and whose residence for tax purposes is in France. CampusFrance runs a websearch engine which can be used for making personalised scholarship searches.

*Student visa and immigration*

French visa and immigration regulations for non-EU/EEA students vary according to the type of visa requested. To study in France, non-EU/EEA students need to submit a letter of acceptance or registration from a French higher education institution, and proof of sufficient resources to finance tuition fees and living expenses. An address in France may be requested for the first months of the stay. If residing in France for more than three months, students must have their visa validated by the French immigration office (OFII). The visa also includes a residence permit for the first year. An interview at the local French consulate is required. In 31 countries an online application system has been set up which can also handle visa request procedures.

*Opportunities for employment during and after study*

Non-EU/EEA students in France are legally allowed to undertake paid work if they possess a student residence permit and are registered at a recognised French higher education institution. Students who hold a student residence permit do not need a separate work permit. A student visa allows non-EU/EEA students to undertake paid work for up to 964 hours per year (corresponding to 60% of the legal working limit).

On completion of their master's degree in France, non-EU/EEA students may apply for a six-month residence permit that will enable them to work for up to 60% of the legal working limit. Non-EU/EEA graduates can apply for a "skills and talents" permit to work in France (whether they have studied in France or not) for up to three years in "skilled employment areas" as specified by the French government.

*Programmes taught in other languages*

The growth in English-taught degree programmes has mainly been at the master's level in business schools, due to pressures to remain attractive to international students whose mother tongue is not French. However, the number of French higher education institutions that offer degree programmes, or parts thereof, in English is increasing. In 2010, 600 higher education programmes were offered at least partly in English by approximately 160 French institutions. Nearly 80% of these programmes were completely taught in English.

*Transnational and collaborative programmes*

French universities offer a number of French and French-foreign dual degree programmes, notably in Vietnam, India, Egypt, Armenia, the United Arab Emirates and Malaysia (in the latter case, students take the first part of their programme in Malaysia, and complete their degree in France). In addition, an Indo-French Consortium of Universities was formed in 2008 to encourage the creation of Indo-French dual degree programmes and student exchange. However, almost three quarters of all French-foreign double degrees are in collaboration with European countries.[27] CampusFrance is currently making an effort to increase the number of French-foreign joint doctoral supervisions and joint degree programmes with institutions in countries including Canada, Tunisia and China.

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[26] CampusFrance (2010) CampusBourses: grant search engine. URL: http://www.campusfrance.org/en/page/campusbourses-grant-search-engine.

[27] ACA / European Commission (2008) Transnational education in the European context – provision, approaches and policies (Brussels: European Commission).

*Other policy instruments for international student recruitment*

France is increasingly marketing its higher education programmes to international students through CampusFrance, which operates 128 offices and 27 annexes in 97 countries – with the majority of offices located in Europe and Asia. Nine of these offices are located in India, and there are multiple offices in China (six offices and seven annexes), Russia (six offices), Canada (four offices and two annexes) and Mexico (four offices).

CampusFrance promotes French higher education abroad by organising, for example:
- Promotion events at international education fairs abroad;
- Promotion tours abroad to attract PhD students (e.g. by French doctoral schools to higher education institutions in China in 2009. This particular initiative was complemented by the launch of a French scholarship programme for Chinese PhD students in France);
- Thematic promotion tours of a limited number of French institutions (e.g. in India, Indonesia and Taiwan) to attract students to French degree programmes in which French institutions are internationally strong, such as business, engineering, and energy, transport and environmental management; and
- Three separate search engines that allow for a personalised search for scholarships (called CampusBourses), higher education programmes offered in France, and French higher education programmes that are partly or entirely taught in English. There is also a specific search engine for doctoral-level programmes.

In addition, CampusFrance aims to improve international student support services by:
- Improving communication and information exchange between the foreign CampusFrance offices and French higher education institutions; and by
- Better integrating foreign students in French higher education through closer involvement of French students, alumni and student associations.

In terms of France's alignment to the Bologna structure, the bachelor's-master's degree structure and a national qualification structure have largely been implemented in France, but not yet fully.

### 2.2.3 Implications for the Netherlands

Several factors make France an attractive place to study for international students. These factors include low tuition fees for non-EU/EEA students, internationally competitive multilingual business degree programmes, and good work opportunities for non-EU/EEA students during their studies. On the other hand, opportunities for non-EU/EEA students to work in France after graduation are limited due to restrictive immigration regulations, and many public universities lack high-quality research facilities.

The French policies described above indicate that:
- France is actively recruiting students from all ten Dutch target countries;
- France is making a special effort to recruit Indian students to long-term degree programmes; and
- Compared with Dutch institutions, French higher education institutions appear to offer more degree programmes and collaborative degree programmes abroad. These programmes help attract a small but steady flow of international students to French programmes.

## 2.3 Germany

With 9% of its higher education population coming from abroad[28], Germany is the third most popular study destination in the world for international students (OECD data).[29] The largest country of origin of international students in Germany is China, which has become Germany's most important partner in education and research cooperation thanks to explicit efforts by the German federal government, the German Academic Exchange Service (DAAD) and individual higher education institutions. In 2010, there were 22,779 Chinese students studying in

[28] It should be noted that DAAD & HIS data distinguish between *Bildungsausländer* (foreign inward mobile students that obtained their secondary school diploma outside of Germany) and *Bildungsinländer* (foreign non-mobile students who obtained their secondary school diploma in Germany). The 9% figure is based on the number of Bildungsausländer only. DAAD & Hochschul-Informations-System (2011) *Wissenschaft Weltoffen 2011*, table 1.1.3. URL: http://www.wissenschaft-weltoffen.de/daten/1/1/3.

[29] OECD (2010) Education at a Glance 2010. Op.cit., Chart C2.3, p.315.

Germany, corresponding to nearly 13% of all international students in the country.[30] Some higher education institutions in several German states will likely face difficulties in recruiting sufficient numbers of home students in the coming decade due to a declining birth rate. In consequence, universities in these states are under pressure to attract students from abroad.

### 2.3.1 National policy strategies for international student recruitment

Germany's international recruitment strategies appear to be integrated with national trade, cultural and international development policies, and this integrated framework can make international student recruitment more effective. The country's economic and research agendas drive international higher education partnerships and international student recruitment, which is a major strength.[31] Germany's student mobility policies also balance a focus on international student and staff recruitment with a focus on encouraging and supporting domestic students and academic staff to study or work abroad.[32]

The federal government has developed and sustained a clear internationalisation strategy to promote Germany as an attractive location for research, development and innovation in selected target countries, such as China, India and Brazil. As part of this strategy, the government continues international campaigns to promote German higher education and to compete for international students, doctoral candidates and graduates of German schools abroad. In addition, representatives from science, industry and politics have been asked to support the aims of this internationalisation strategy with a joint concept for promoting the strengths of German research. This strategy may be instrumental in attracting more research students to Germany.

An example of an initiative that follows from this strategy is the German government's effort to attract more students from India under the Year of Germany and India 2011-2012 Programme. An amount of € 6 million is being allocated to the programme, which is jointly funded by the German Foreign Office, the Goethe Institute, the Asia-Pacific Committee of German Business, and the federal Ministry of Education and Research. The programme is aimed at promoting the visibility of German higher education and making the country a more attractive study destination for Indian students. The German government focuses on attracting Indian students to English-taught programmes in science, technology and the liberal arts, highlighting the international dimension of German higher education and the availability of job opportunities in Germany upon completion of the programme.

DAAD has developed several major programmes that drive international partnerships and exchange (these policy measures are discussed in the next section).

While there is no national-level "list" of Germany's priority target countries for international student recruitment, DAAD higher education cooperation strategies and initiatives appear to place a strong emphasis on eight out of the list of ten Dutch target countries, namely Brazil, China, India, Indonesia, Russia, South Korea, Thailand and Vietnam (although it should be noted that DAAD scholarship programmes are open to students from all countries in the world). DAAD targets a much wider range of countries, however, with additional emphasis on recruitment from Canada, Japan, Kazakhstan, Singapore, Ukraine and the US (among other countries).[33]

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30) Data are for *Bildungsausländer* only (i.e. those international students that have moved to Germany for the purpose of higher education studies and obtained their secondary school diploma in another country).
By comparison, there were 5,000 Chinese students in the Netherlands that year, making up 6.6% of all international students in the Netherlands. DAAD & HIS (2010) *Wissenschaft Weltoffen 2010*, tables 1.1.2 and 1.2.3. URL: http://www.wissenschaft-weltoffen.de/daten; Nuffic (2009) *Internationalization in higher education in the Netherlands: key figures 2009* (The Hague: Nuffic). URL: http://www.nuffic.nl/nederlandse-organisaties/docs/kerncijfers/key-figures-mobility-2009.pdf.

31) Becker, R., V. Lasanowski, H. Goreham, D. Olcott, S. Woodfield and R. Middlehurst (2009). *An Analysis of National and Institutional Approaches for Attracting International Students and Facilitating Internationalisation in the United Kingdom and Selected European Countries* (London: UK Higher Education Europe and International Units). URL: http://www.international.ac.uk/resources/UK%20Universities%20and%20Europe%20Competition%20and%20Internationalisation.pdf.

32) No Author (2011) 'Germany top for internationalization', in: The Chronicle of Higher Education. URL: http://jobs.chronicle.com/academicDestinationArticle/Germany-Tops-Global-Gauge/39/.

33) Based on international collaboration initiatives mentioned on the DAAD website. URL: http://www.daad.de.

### 2.3.2 National policy instruments for international student recruitment

*Tuition fees and scholarship opportunities*

At the time of writing (July 2011), four out of Germany's sixteen federal states charge tuition fees, but two of these have decided to abolish the existing tuition fees in 2012. Fees are comparatively low: in the states that have fees, the tuition fee ceiling has been set at € 500 per semester (€ 1,000 a year).[34] Tuition fees in Germany are generally the same for home, EU/EEA and non-EU/EEA students. The low fee levels are attractive to international students. In addition, tuition-fee income is mainly used to fund improvement of study conditions for both home and international students, which sends a message of care. International (and home) students are also required to pay a small registration fee per semester, while some universities also require foreign applicants to pay an application fee of approximately € 50.

DAAD offers attractive scholarships for international postgraduates. It also offers scholarships for international undergraduates, but only in specific programmes, such as the scholarship programme for graduates of "German schools" abroad. DAAD also offers scholarships to foreign university applicants who are required to attend a preparatory college to prepare them for higher education studies in Germany. In 2009, the German Foreign Office announced that the range of scholarship programmes for "high-quality" international students would be extended and improved. DAAD provides a scholarship database that lists funding opportunities for international students offered by over 60 organisations.

*Student visa and immigration*

Student visa and immigration regulations in Germany are less strict than in the Netherlands. A student visa costs € 60. To obtain a visa, students need to submit an acceptance letter from a German institution (or in some cases confirmation of the student's status as an applicant), proof of a health insurance cover, and proof of means to cover the expenses of one year of study in Germany. The required amount, € 7,908 in 2011, is determined each year by the Ministry of the Interior.

*Opportunities for employment during and after study*

A residence permit allows non-EU/EEA students in Germany to undertake paid work during their studies for 90 full days or 180 half days a year (on average, this regulation corresponds to a maximum of fourteen hours a week) and to take up spare-time student employment. Non-EU/EEA students are not allowed to work full-time during holiday periods. According to the Residency Act, temporary or casual work for non-EU/EEA students enrolled in pre-university preparation courses is not permitted, except during holiday periods.

Non-EU/EEA graduates of a German university who stay in Germany to look for employment after completing their studies may work to the same extent as non-EU/EEA students registered at a German university. However, residence permits can be revoked if unauthorised paid employment is taken up. After graduation, non-EU/EEA students can extend their residence permit to look for employment in Germany for up to one year, provided that they can prove to have sufficient financial means for this "job search year".

*Programmes taught in other languages*

German higher education institutions offer a high percentage of bachelor's and master's degree programmes solely or primarily in English, or in another major foreign language (including Chinese, French, Italian, Russian and Spanish). In the latter "international bachelor's and master's programmes", German language courses are offered parallel to, or are integrated into, the programme. The international programmes are highly structured and provide intensive student guidance and supervision. These multilingual programmes are attractive to international students since they prepare students for employment in a global economy, and approximately half of the participants in these programmes are from abroad.

[34] Although in Hamburg, the fee has been set at € 375 per semester. Studis Online Website. URL: http://www.studis-online.de/StudInfo/Gebuehren/.

*Transnational and collaborative degree programmes*

Generous federal government and DAAD funding is available to assist German universities to develop transnational higher education initiatives abroad. Since 2001, DAAD has offered federal government funding to encourage German universities to develop integrated international dual and joint degree programmes with universities in a wide range of countries, including (but not limited to) China, Russia, Poland, Spain and Italy. The German Ministry of Economic Affairs and Technology also allocated three years of funding to selected German universities to develop dual or joint degree programmes with universities in the US and Canada. These programmes are instrumental in recruiting more international students. German universities have so far developed around 100 dual or joint degree programmes at the bachelor's and master's levels with partner institutions in at least 35 countries.

DAAD also allocates funding for the establishment of overseas German institutes for education and research. These funds are time-limited and awarded on a competitive basis. In addition, in the past decade a federal government funding programme has encouraged German universities to establish branch faculties abroad. Several German universities have done so, for instance in China and Thailand, and one has set up a German Institute of Science and Technology in Singapore. Several German universities are also participating in German-backed universities that are aimed at local capacity building in the countries where they are located. Examples include the Vietnamese-German University in Vietnam, the German university in Egypt and the Kazakh-German University. Germany also carefully monitors the quality of its higher education programmes offered abroad.

The German government (through DAAD) has also funded English-taught summer programmes at German universities, which are open to students from all countries. Such summer programmes can be used to recruit international students to full degree programmes in Germany and to attract senior international students to lecture and research opportunities in the country.

*Other policies for international student recruitment*

Germany's Federal Foreign Office is supporting the national "global knowledge network" through its Research and Academic Relations Initiative. This initiative is aimed at increasing the international visibility of German universities and research institutions and at strengthening Germany's competitive position in the international market. Through this initiative, new policy instruments have been developed that are also likely to support international student recruitment and exchange. Examples of these instruments are:

- The establishment (in 2009) of four German "centres of excellence" in Russia, Colombia, Chile and Thailand, aimed at encouraging German and foreign institutions to develop joint course programmes and organise student and staff exchanges;
- Extending and improving the range of scholarship programmes for international students; and
- Expanding opportunities abroad to learn German as a foreign language.

These policy measures have been implemented by DAAD, which has also developed several other programmes that drive international partnerships and exchange and make German higher education more attractive to international students. For example, DAAD:

- operates a large number of recruitment and education promotion offices ("information centres") in at least 52 countries;
- funds international student recruitment campaigns and participates in many international student fairs abroad;
- has improved support for international students to enable them to complete their studies in Germany successfully and in time;
- provides funds to develop German-Brazilian double degree programmes at master's and PhD level;
- provides funds to expand the number of course programmes offered abroad by German higher education institutions (e.g. in Egypt and Jordan);
- has offered interested German universities the opportunity to send staff members to its office in China, to give them an opportunity to benefit from an in loco strategy to attract Chinese students to their institution;

- has implemented measures to facilitate information for prospective international students. For instance, to facilitate access to course options for Russian students, DAAD launched a project to enable German universities to place information on their course programmes online in Russian. Another example is DAAD's "Study in Germany" website[35];
- has established German academic test centres in some countries, such as Vietnam, to check whether foreign applicants meet the entry requirements for German tertiary education;
- in a joint initiative with the German Rector's Conference, DAAD has created Uni-assist, a "working and service unit" that administers applications of international and German students on behalf of its member universities. Uni-assist is also a certification service for international student applications. At the moment, 128 German universities only process international student applications once they have been formally pre-checked by Uni-assist.[36] For students, the advantage of Uni-assist is that they only need to contact one central office and need only one set of application papers to apply for enrolment at several German universities. Uni-assist also helps German higher education institutions in the selection and admission of international students.
- promotes the development of international double degree programmes; and
- provides funds to expand the number of German-taught courses abroad through institutional partnerships or through DAAD's lector programme (where German lectors are employed at foreign higher education institutions).

### 2.3.3 Implications for the Netherlands

The following factors make Germany an attractive study destination:

- Only very few German states charge student fees, and where fees have been introduced, international student fees are comparatively low.
- DAAD offers good scholarship opportunities for international students.
- There are close partnerships between the German *Fachhochschulen* and industry, which may offer attractive work placements for students.
- German research universities are known for their high quality. The quality of technical and engineering programmes at German universities and the country's strong specialist institutions are especially attractive to international students.
- German universities have developed degree programmes not only in English, but (albeit to a small extent) also in Spanish and French. This makes their programmes attractive to a wider range of international students in areas of strategic future economic collaboration, and prepares students better for international careers in which multilingualism is an asset.
- Compared with the Netherlands, student visas in Germany are very cheap.

For the Netherlands, the German initiatives described above have the following implications:

- Germany has reported a particular need to recruit international students because of falling student numbers locally in science, technology, engineering and mathematics – areas in which Dutch universities are also experiencing falling student numbers. This could make it even more difficult for Dutch institutions to compete for good international students in these areas. (Note, moreover, that Germany is also about to make itself more attractive to foreign professionals in these areas, since the federal government has recently approved legislation on the recognition of qualifications that immigrants have acquired abroad. The new regulations will make it much easier for many professionals to find employment in Germany in fields such as mathematics, informatics, natural sciences and engineering.[37] The new legislation was developed following fears over a shortage of highly skilled workers that can fuel Germany's future economic development.)
- German recruitment efforts target at least eight of the ten Dutch priority countries for recruitment.
- DAAD offers more and attractive scholarships for international students at postgraduate level.
- DAAD has given generous financial assistance to enable selected German universities to develop transnational education initiatives abroad. This investment in German-foreign dual and joint degree programmes is an investment in future collaboration, but also in increasing international student recruitment and exchange.

35) Studieren in Deutschland Website (2011). URL: http://www.study-in.de/de/.
36) Uni-assist Website. http://www.uni-assist.de/uni-assist.html.
37) Gardner, M. (2011) 'Germany: Draft legislation recognises foreign degrees', in: *University World News,* 3 April. URL: http://www.universityworldnews.com/article.php?story=20110401191139180.

- Overall, the German government has sustained a very consistent international higher education cooperation policy, focused on "academic excellence", of which international student mobility is a part. This consistent and focused policy has contributed to Germany's strong position in the global market for international students.

## 2.4 Switzerland

There are approximately 33,000 international students in Switzerland, making up 26% of all students in Swiss higher education.[38] Around 75% of international students in Switzerland are from other European countries (mainly from Germany, France, Italy and Austria), but the number of non-EU students in the country is increasing. Students from China, India, the US and Iran form the largest groups of non-EU students in Switzerland. Approximately 20% of master's students and nearly 50% of all PhD students in Switzerland are from abroad. Switzerland has one of the highest percentages of international faculty staff per capita in the world, with several institutions boasting international faculty ratios of more than 50%, partly due to the fact that 40% of the country's PhD candidates – who count as faculty – are from abroad.

### 2.4.1 National policy strategies for international student recruitment

Until recently, there have not been many national efforts to recruit international students since responsibilities for higher education are shared between federal and cantonal authorities. However, Swiss higher education policy-making has now been streamlined, which is likely to lead to increased national-level international recruitment efforts.

The State Secretariat for Education and Research (SER) and the Rectors' Conference of the Swiss Universities (CRUS) have formulated the mission to make Switzerland one of Europe's premier higher education locations by 2015. Education and research policy is oriented towards sustainably securing and improving quality and increasing competitiveness and growth.

Partly due to a lack of capacity in the small Swiss higher education system, the country focuses on increasing its international competitiveness by targeting "top-class" master's and doctoral students in the areas of science, technology, engineering and hospitality. (In terms of student numbers, the most popular subject area for international students in Switzerland is engineering and technology – which is the fourth most popular subject area for international students in the Netherlands.)

Interestingly, Switzerland has integrated international student recruitment strategies in bilateral strategies for cooperation in research. Switzerland's priority countries for research collaboration and international student recruitment are Brazil, Chile, China, India, Japan, Russia, South Africa, South Korea, the US, Canada and Singapore. Switzerland thus not only focuses on recruitment from "developing" countries, but also on developed countries such as the US and Canada. Five of these priority countries overlap with the ten Dutch target countries.

To expand international cooperation beyond Europe and for the 2008–2011 period, the SER allocated CHF 43 million (approximately € 32 million) for worldwide bilateral scientific research cooperation with seven priority countries, including China, India, Japan, Russia, South Korea, South Africa and Chile. The SER has matched these target countries to particular Swiss universities on the basis of reciprocal research interests and institutional focus. At the same time, the SER has assigned "leading house" roles to Switzerland's main research institutions. For example, the Swiss Federal Institute of Technology in Zurich (ETH Zurich) is the "leading house" for bilateral cooperation with China in order to promote Sino-Swiss science and technology cooperation in biotechnology, life and medical sciences, environment, and urban and sustainable development. The "leading house" for India is the Swiss Federal Institute of Technology in Lausanne; for Russia, it is the University of Geneva, and for South Africa, the University of Basel.

[38] Statistik Schweiz (2010) *Studierende an den universitären Hochschulen: Basistabellen & Studierende an den Fachhochschulen (inkl. PH): Basistabellen*. URL: http://www.bfs.admin.ch/bfs/portal/de/index/themen/15/06/data.html#Studierende.

At the national level, Switzerland has developed strategic policies to promote its higher education abroad. The SER is concentrating its current efforts on the country's development towards a "world-class destination for thought and work". To achieve this, Switzerland has set up science and technology councils in seventeen foreign countries and established four centres for science, technology and innovation (two in the US, one in Singapore and one in China), with a fifth centre being established in India. These centres are promoting Switzerland as a world-class location for science and technology.

In July 2011, the Swiss Rectors' Conference reportedly announced that Swiss universities should be allowed to set a numerus clausus for international students on Swiss degree programmes if a degree programme has an acute lack of capacity to host all applicants. To what extent this restriction will be implemented is not yet known.

### 2.4.2 National policy instruments for international student recruitment

*Tuition fees and scholarship opportunities*

Just over half of the country's officially recognised universities charge the same tuition fees for international students as they do for Swiss nationals. Others charge slightly higher fees for international students. Swiss tuition fees for international students are CHF 1,500 (€ 1,130) per year on average (with one exception of a university charging CHF 8,000), which is approximately six times as low as those charged in the Netherlands. In July 2011, however, the Swiss Rectors' Conference gave the green light for setting higher, full-cost tuition fees for international students.

National scholarship funding is available for international students. The Swiss Federal Commission for Scholarships for Foreign Students (FCS) offers scholarships for study at the universities and the two Federal Institutes of Technology, both on the basis of reciprocity (a fixed number of scholarships for each country) and non-reciprocity. The FCS scholarship scheme is aimed at attracting postgraduate students from specific countries – including Brazil, Chile, China, India and Russia – , who will study in Switzerland while undertaking research in areas of study in which Swiss universities are particularly active.

*Student visa and immigration*

Swiss immigration policy is relatively restrictive, with strategies directed towards attracting highly skilled international students only. To enter Switzerland as a student, international students need to provide proof of acceptance from a Swiss higher education institution and proof of sufficient financial means for the duration of their studies. A student visa costs € 120 and a residence permit for two semesters costs € 19.

*Opportunities for employment during and after study*

Non-EU/EFTA students studying in Switzerland are permitted to undertake paid part-time work for a maximum of fifteen hours per week during term-time and holidays, but only after having resided in Switzerland for at least six months. In addition, students must maintain full-time student status and show regular study progress. After graduating from a Swiss higher education institution, international students are not automatically allowed to stay in Switzerland to look for employment. Only a very limited number of highly qualified scientists with a degree obtained in Switzerland in areas or sectors in which there is a potential labour shortage are admitted and issued a work permit.[39)]

*Programmes taught in other languages*

A high proportion of higher education programmes are offered in English (particularly at master's level). Other programmes are taught in one of three of the country's official languages: French, German and Italian. This multilingual offer of higher education programmes can be attractive to international students. As much as 80% of master's level education is reportedly available in English at some institutions, partly to meet the demand of the

[39)] Swiss Confederation (2010) 'Legal basis for access to the Swiss labour market by foreign nationals'. URL: http://www.bfm.admin.ch/content/bfm/en/home/themen/arbeit/nicht-eu_efta-angehoerige/grundlagen_zur_arbeitsmarktzulassung.html#Exceptions to the admittance requirements.

international student market, and partly because of the country's large foreign resident population. Bachelor's programmes last three years, while master's courses take one and a half or two years to complete.

*Transnational and collaborative degree programmes*

As responsibility for higher education is shared between federal and cantonal authorities, transnational education initiatives are largely developed at the institutional level. However, according to the 2010 international strategy of the federal government, Switzerland should develop ways to export education programmes, and especially professional education programmes, to other countries.[40)]

While Swiss higher education institutions do not offer many Swiss programmes abroad, they do provide several collaborative degree programmes with foreign universities. This is also a way to attract good-quality international students. Furthermore, international student mobility is institutionalised in some Swiss universities through participation in higher education networks. The University of Basel, for instance, belongs to the cross-border Confederation of Upper Rhine Universities (EUCOR), a tri-national organisation (Swiss, German and French) that allows students unhindered access to higher education courses across the three national borders.

### 2.4.3 Implications for the Netherlands

Switzerland is an attractive study destination for the following reasons:

- Switzerland has an "excellent" quality of higher education;
- The country is internationally recognised as a leading "centre" for research and many international students enrol in research-based (postgraduate) courses.
- Swiss universities are strong in science and technology, and there are various high-quality specialist higher education institutes focusing on technology, social sciences and public administration.
- Higher education programmes are available in German, French and Italian, and a high proportion of programmes is offered in English. This multi-lingual provision is attractive to students that seek international careers.
- Low tuition fees and cheap student visas (when compared with the Netherlands), although the cost of living in Switzerland is high.
- Higher education institutions are closely linked to industry, leading to professionally relevant course programmes which give graduates good employment opportunities; and
- Switzerland is home to several world-class international organisations, which are attractive to international students who wish to secure a work placement position there.

On the downside, when compared with the Netherlands, Switzerland:

- Offers limited opportunities to obtain a post-study work visa;
- Is expensive in terms of the cost of living; and
- allows non-EU/EEA students to work up to fifteen hours a week (compared with ten hours a week in the Netherlands), but only after they have studied in Switzerland for over six months.

When compared with the Netherlands, Switzerland's position in the international market for postgraduate students is strong because:

- The country actively targets five of the ten Dutch priority countries for student recruitment;
- Switzerland has a coherent strategy and policy framework in place to attract "top-class" students in science, technology, engineering and mathematics – areas in which Dutch higher education institutions experience a lack of student enrolments; and
- Swiss policy strategies link international student recruitment closely to the bilateral research collaborations of the country's higher education institutions. This strategy is effective in attracting international students at master's and doctoral levels.

40) Schweizerische Eidgenossenschaft (2010), op.cit.

The latter strategy may be an interesting strategy for the Netherlands to consider, since only a minority of international students in the Netherlands are enrolled at postgraduate level.

## 2.5 The United Kingdom

With a current market share of approximately 12% of the world's international students, the UK ranks second in the world (after the US) in the number of international students it attracts. In the past decade, the number of international students in the UK has doubled, and OECD figures show that since 2000 the number of international students in UK higher education has increased by nearly 50%. 2010-11 alone saw an 11% rise in the number of international students enrolled in the UK, compared with the previous year. The largest groups of international students in the UK are from China (accounting for 12.7% of all international students in the UK) and India (accounting for 9.2%, but rising sharply).[41)]

### 2.5.1 National policy strategies for international student recruitment

In the current second round of the Prime Minister's Initiative for International Education (PMI2), a five-year strategy launched in 2006, international student recruitment is an important element. The strategy recognises that the UK's ability to attract international students increasingly depends on the international reputation of UK higher education institutions, as partly determined by the strength of the international partnerships UK universities build. The strategy is aimed at:

- Positioning UK higher education as a strong national brand through marketing and communication;
- Ensuring the quality of the international student experience;
- Building strong international partnerships (which is also used as a means to attract more international students to UK higher education programmes); and
- Market diversification and consolidation based on greater understanding of the countries UK universities operate in.[42)]

Through PMI2, UK universities are working with governments, education providers and industry in identified countries to build bilateral cooperation and partnerships. The strategy sets out four targets for 2011:

- To attract an additional 70,000 international students to UK higher education, and an additional 30,000 international students to UK further education.
- To improve student satisfaction ratings in the UK, which include a focus on particular aspects, such as employability.
- To significantly increase the number of higher education partnerships between the UK and other countries, and
- To double the number of countries sending more than 10,000 students per year to the UK.

PMI2 has identified a long list of target markets for international student recruitment and collaboration, but in reality the UK mainly targets Brazil, China, India, Mexico, Russia, South Korea, Taiwan, Thailand and Vietnam (which are also prioritised by the Dutch government). The UK's secondary target countries are Australia, Bangladesh, Canada, Ghana, Hong Kong SAR, Japan, Malaysia, Nigeria, Pakistan, Saudi Arabia, Singapore, Sri Lanka, Turkey, the United Arab Emirates, and the US.

National (and institutional) strategies predominantly focus on recruiting high fee-paying non-EEA students, since revenues from non-EU/EEA student fees form a significant proportion of the income of many UK higher education institutions and have a huge impact on their financial sustainability and their ability to develop core activities of teaching and research. Furthermore, there are indications that UK authorities are keen to take advantage of new recruitment opportunities. One example is the British university minister, who immediately flew to Brazil in June 2011 to ensure that a large share of the newly announced scholarship programme would be allocated to enable 10,000 Brazilian students to study in the UK.

41) UNESCO statistics, Data centre. URL: http://www.uis.unesco.org/ev.php?ID=2867_201&ID2=DO_TOPIC.
42) British Council (2010) 'PMI2 overview'. URL: http://www.britishcouncil.org/eumd-pmi2-overview.htm.

### 2.5.2 National policy instruments for international student recruitment

*Tuition fees & scholarship opportunities*

At this moment, UK tuition fee levels for non-EEA students are similar to those charged in the Netherlands, and among the highest in Europe. Non-EU/EEA (undergraduate and postgraduate) tuition fees are set by the institutions themselves. UK non-EEA tuition fees range from approximately € 7,000 to € 16,000 per year for bachelor's programmes and from € 6,000 to € 23,000 for master's programmes (with a few higher fee programmes).[43)]

In December 2010, the UK government announced that HEIs could increase home/EU/EEA tuition fees up to a maximum annual fee of £ 9,000, which may be charged in "exceptional circumstances". Many universities have announced that they will set their fees for at least some of their courses at the £ 9,000 (€ 10,317) maximum for home/EU/EEA students, starting in September 2012.[44)]

Competition-based scholarships are available to international students in the UK through organisations such as the British Council and the Commonwealth Scholarship and Fellowship Commission. The number of these scholarships is limited, however, and has been reduced in recent years. Most UK universities offer some funding assistance to international students in the form of fee waivers or discounts.

*Student visa and immigration*

UK student visa regulations for non-EU/EEA students are strict and derive from a points-based immigration system. Students needing a student visa to study in the UK are awarded points if they can demonstrate that they have been offered a place in a degree programme and that they have sufficient funds to maintain themselves. All universities wishing to enrol non-EU/EEA students must have a license issued by the UK Border Agency to "sponsor" these students to study in the UK. To study in the UK, each non-EU/EEA student needs a licensed sponsor. Universities must inform the UK Border Agency if a student fails to enrol or misses more than ten classes. A student visa costs £ 199 (€ 228) if applied for from outside the UK, £ 357 (€ 409) if applied for within the UK by post, and £ 628 (€ 720) if applied for at a public enquiry office in the UK.[45)]

In March 2011, the UK Home Office announced several changes in student visa regulations, including the following:

- From April 2012, any UK higher/further education institution wanting to "sponsor" (enrol) students must be accredited by an inspection body;
- International students coming to the UK to study at degree level must be able to demonstrate a higher level of English-language proficiency;
- Only postgraduate students at universities and government-sponsored students will be able to bring their dependants; and
- The total time that can be spent on a student visa will remain three years at lower degree levels, but will be limited to five years at higher levels.[46)]

*Opportunities for employment during and after study*

The UK offers relatively good work opportunities for international students during their studies. Students from outside the EU/EEA currently may work up to 20 hours a week on the basis of a student visa during their period of study, and up to 40 hours a week during the holiday period. From April 2012, students at universities and publicly funded further education colleges will retain their right to work during their studies, but all other students will have no right to work. This measure is intended to help reduce the flow of 160,000 international students who come to

43) Universities UK (2010) Survey of tuition fees for international students: survey results 2009-10. URL: http://www.universitiesuk.ac.uk/Newsroom/Facts-and-Figures/International-student-tuition-fees/Survey-results-2009-2010/Pages/Default.aspx.
44) Coughlan, S. (2011) 'Tuition fees: 'universities' want to charge £9,000', in: BBC News, 19 April. URL: http://www.bbc.co.uk/news/education-13116975.
45) Study London Website. URL: http://www.studylondon.ac.uk/student_advisor/92_visa_cost.
46) UK Border Agency (2011) 'Government outlines overhaul of student visas', 22 March. URL: http://www.ind.homeoffice.gov.uk/sitecontent/newsarticles/2011/march/54-student-visas.

the UK to attend courses below degree level in further and higher education colleges. This group constitutes half of the 320,000 students who come to study in the UK each year.

Post-study work regulations are strict. From April 2012, non-EU/EEA graduates from UK universities will no longer be allowed to stay in the UK for two years after completing their programmes. To work after graduating from a UK higher education institution, non-EU/EEA students rely on:

(i) employer sponsorship, with employers having to be registered to accept overseas workers in the "Tier 2 point system" and having to certify that no other suitable candidate can be found within the EU, and

(ii) "Tier 2" visas, which are difficult to obtain: students must have a UK job offer from sponsoring employers for a job that matches their skills level, the annual salary offered must be at least £ 20,000 (€ 22,924) and the number of post-study work (Tier 2) visas is capped at 20,700 per year, with 1,500 to be released each month.[47)]

The above measures are intended to lead to a system in which the UK will attract "top-class" students to degree programmes, to help fulfil the government's pledge to cut net migration to the UK from 200,000 to under 100,000 by 2015, and to cope with high domestic levels of unemployment.

*Transnational and collaborative degree programmes*

The British Council has dedicated marketing funds to attract international students, and the British government allocates targeted funding for a number of international student recruitment and partnership schemes with specific countries or regions. The UK-India Education and Research Initiative (UKIERI), for instance, was launched in 2006 to strengthen links between the UK and India and includes initiatives to develop collaborative higher education programmes, which may (among other things) help attract more Indian students to UK programmes. The programme, which is jointly and equally funded by the UK and Indian governments, is now starting its second phase. Another example is the British Council's PMI2 Connect programme, which so far has funded 370 UK-foreign higher education partnerships in research, collaborative delivery, student exchanges and the development of strategic links at the institutional level. With the exception of UKIERI, however, the future of these initiatives is unclear and depends on future government policy.

Compared with other European countries, the development of transnational higher education programmes by UK universities – as a means to attract more international students – is advanced. In 2008/09, there were 388,000 students studying for a UK qualification *outside* of the UK – a stunning figure that is even higher than the total number of international students that were enrolled in UK programmes *within* the UK in that year (369,000).[48)]

Of all international students enrolled in UK higher education programmes outside of the UK, 83% were non-EU students, 51% were enrolled at an overseas partner organisation, 29% studied through distance or flexible learning, 2.5% studied overseas at a UK branch campus, and 18% studied through another arrangement, such as collaborative provision (double and joint degrees).[49)] Of all these students, 78% studied for a bachelor's degree and 19% for a master's degree.

International branch campus strategies are set at the institutional rather than the national government level. However, the existing UK international branch campuses, of which their are some fourteen, are aimed at attracting a higher number of international students, not only from the country where the campus is located but also from the wider region. Where universities have set up overseas campuses, attempts have been made to ensure articulation between courses started at the overseas campus and those completed at the UK campus, given the potential increase in popularity of undergraduate programmes of which the first two years take place in another country and which are completed in the UK.

UK higher education institutions showed that the "post-1992" universities (i.e. the former polytechnics, university colleges, and colleges of higher education) are the largest providers of transnational higher education (TNE), providing approximately 63% of all TNE programmes offered abroad by UK universities. According to the survey,

47) Workpermit.com (2011) 'Tier 2 Visa for Skilled Migrants'. URL: http://www.workpermit.com/uk/tier-2-visa.htm.
48) UK Higher Education International Unit (2010) *International higher education in facts and figures, Summer 2010* (London: International Unit).
49) Higher Education Statistics Agency (2010) Students studying wholly overseas.

research universities offer around 31% of TNE, with specialist colleges accounting for 6%. The post-1992 universities offer TNE programmes mainly in other European countries, while the research universities offer most of their TNE programmes in Asia.

*Other policies for international student recruitment*

The national quality assurance system takes aspects of internationalisation of higher education institutions into account, and all recognised UK transnational higher education programmes offered abroad have been quality assured by the UK's Quality Assurance Agency for Higher Education. Furthermore, the British Council promotes the UK higher education sector through a large network of just over 200 overseas higher education marketing offices in 110 countries. Several universities have established their own marketing offices abroad, either alone or in partnerships with recruitment agents.

The British Council does not accredit or formally recognise any recruitment agents, but it does provide several services to assist agents working with UK institutions, to increase the quality of the agents' work. These services include an online course for agents working for the British Council, a guide to good practice for agents, designed by the British Council, Education UK Websites and publications that give agents access to local news in their local language, opportunities for agents to participate in Education UK networking events, and informational visits of agents to the UK.

Many universities offer one or two-year foundation programmes in collaboration with for-profit providers such as Study Group, INTO University Partnerships, and Kaplan. These programmes prepare international students for entry to undergraduate and postgraduate degree programmes, and they offer guaranteed entry to a specific degree at the university, provided that students achieve the grades required to proceed. The foundation programmes are a way to attract international students whose knowledge and language and academic skills would otherwise not have been sufficient for entry into a UK degree course.

### 2.5.3 Implications for the Netherlands

The UK's success in attracting an increasing number of international students, and in raising the amount of income universities derive from these students, has predominantly been based on the high quality of teaching and research (and the perception of this internationally) and on the fact that English is the language of instruction. Opportunities to work during study are also comparatively good in the UK. Despite the country's relatively high living costs and tuition fees, there have been targeted efforts by UK universities to recruit international students, many of whom have so far considered that UK higher education offers good value for money.[50] International students in the UK are mainly attracted to degree programmes in business and administrative studies, followed by engineering and technology, and social studies. Internationally, UK universities are strong in attracting international master's and PhD students. In addition, many UK higher education institutions use the International Student Barometer, which enables them to track a range of aspects of international students' experiences in the UK and their reasons for choosing the UK as a study destination.[51]

As the second most popular country in the world to study for international students, the UK has a strong position in the international higher education market, This is largely because:

- UK higher education institutions have a competitive mindset and operate increasingly sophisticated student recruitment strategies in key target countries – with support from the government and the British Council;
- The relatively large autonomy of UK universities, combined with a liberal regulatory regime for international activities;
- The UK has successfully developed itself as a widely known education destination and also has a large foreign alumni base;

50) Becker, R., V. Lasanowski, H. Goreham, D. Olcott, S. Woodfield and R. Middlehurst (2009). *An Analysis of National and Institutional Approaches for Attracting International Students and Facilitating Internationalisation in the United Kingdom and Selected European Countries* (London: UK Higher Education Europe and International Units). URL: http://www.international.ac.uk/resources/UK%20Universities%20and%20Europe%20Competition%20and%20Internationalisation.pdf.

51) I-Graduate (2011) 'International Student Barometer and Student Barometer'. URL: http://www.i-graduate.org/services/student_insight--student_barometer.html.

- Due to many colonial links, the UK attracts many students from its former colonies;
- The UK's priority countries for student recruitment include nine out of the ten Dutch priority countries; and
- The UK is a big player in the global transnational higher education market and offers many foundation programmes to prepare international students for study in UK degree programmes.

On the basis of the UK initiatives described above, more Dutch higher education institutions could consider (i) establishing more collaborative degree programmes in the ten Neso countries as a means to attract more international students, and (ii) developing foundation programmes abroad in collaboration with other Dutch higher education institutions and private providers, such as Study Group, INTO University Partnerships, and Kaplan.

## 2.6 The United States

The Unites States (US) competes in the international student market on the basis of sheer size. The country receives the highest number of international students in the world, but on a *per capita* basis, its performance is modest, despite the fact that it has many of the best and richest universities in the world. In the US, international student recruitment is not primarily seen as a source of revenue. The driver is rather to recruit the best students, and this focus on academic talent is also beneficial to the wider economy.

In 2009/10, there were almost 691,000 international students enrolled in the higher education sector, which corresponds to 3.5% of total student enrolment in higher education.[52] Over 80% of all international students in the US are enrolled in a full-time degree programme. Of all international students in the country, nearly half are undergraduates, while just over half are postgraduate students. The main countries of origin of international students in the US are China, India, South Korea, Canada, Taiwan and Japan.

### 2.6.1 National policy strategies for international student recruitment

The US has no comprehensive national policy on international student recruitment or internationalisation of higher education. In 2003, NAFSA, the Association of International Educators, urged the federal government to develop a comprehensive recruitment strategy for international students, with shared responsibilities between the Departments of State, Commerce and Education. There are two main reasons for developing a national international recruitment strategy. First, there is awareness that the best and brightest students may not continue to opt for the US automatically, since competing countries (such as Australia and the UK) have implemented targeted recruitment measures. The second reason is the perceived need to counteract terrorism by building ties and friendships around the world.

In 2007, NAFSA formulated a policy strategy to promote internationalisation of learning by encouraging students from other countries to study in the US, promoting study abroad by US students, facilitating the exchange of scholars and citizens at all levels of society, supporting the learning of foreign languages and knowledge of other cultures by Americans, and by enhancing the educational infrastructure for developing international competences and research.[53]

In recent years, some national-level efforts were made to encourage international student mobility to the US from specific countries, with a particular emphasis on India, Indonesia and Vietnam. In 2010, the Institute of International Education (IIE) led a delegation of higher education officials from ten colleges and universities in the US to visit India with the aim of increasing the number of higher education partnerships between in the US and India, since India is an emerging economic power with a considerable demand for more higher education places. These partnerships could possibly lead to an increase in student mobility between the US and India.

52) Institute of International Education (2010). Press release: international student enrollments rose modestly in 2009/2010, led by strong increase in students from China. URL: http://www.iie.org/en/Who-We-Are/News-and-Events/Press-Center/Press-Releases/2010/2010-11-15-Open-Doors-International-Students-In-The-US.

53) NAFSA (2010). Public Policy: United States International Education Policy. URL: http://www.nafsa.org/public_policy.sec/united_states_international/.

In 2010 the Obama Administration added the priority to boost higher education exchanges between the US and Indonesia, aiming to double the number of Indonesians studying in the US to 14,000 by 2014. This strategy is intended to stimulate the US economy and improve relations with the rapidly developing Muslim-majority nation.[54] The Obama Administration also targets Vietnamese students to study in the US, also as part of a wider, long-term economic strategy to set the US on a strong footing in emerging global markets. Expanding educational opportunities for students in emerging economies like Indonesia and Vietnam is expected to help develop a middle class in those markets which will in turn be able to buy US goods and services.[55]

Many US universities are making efforts to attract Chinese students (there were over 40,000 Chinese undergraduates studying in the US in 2009/10, a 46% increase over the previous year), but in terms of recruitment, China appears to be targeted mainly at the institutional rather than the national level. There is, however, a national initiative in place to send more US students to China, since ten times as many Chinese students study in the US than vice versa, and 600 times more Chinese study the English language than Americans study Mandarin. As this imbalance in knowledge can undermine strategic trust between the two countries, the US Department of State has decided to take measures to ensure that US citizens have the cultural understanding and language skills that underpin effective diplomacy, foreign policy, and economic exchange. In November 2009, President Barack Obama therefore announced the "100,000 Strong" initiative, a national effort designed to increase dramatically the number of American students studying in China and diversify the composition of this group. Based on the strategic importance of the US-China relationship, this initiative was developed to prepare the next generation of American experts on China who will be charged with managing the growing political, economic and cultural ties between the two countries. The Initiative relies fully on private-sector philanthropic funding.

At the individual state level, 21 US states and one city (Metro New York) have formed a consortium with an active international student recruitment focus. In a few states, higher education promotion for international student recruitment purposes is organised at state level. In the Spring of 2011, the state of Michigan launched the Global Michigan Initiative to attract highly skilled immigrants to the state to help strengthen economic development, and international students are included in this population. Other examples of state initiatives are the Alabama Council for International Programs, which offers an information/higher education promotion website for international students on study opportunities in the state of Alabama; and southern California, where a non-profit organisation, the Education, Training and Export Consortium, participated in higher education marketing events in countries such as China, South Korea and Thailand.

Furthermore, approximately 23 US states have passed state-level international education resolutions, which focus however on promoting international student exchange and studies abroad by US students, rather than on international student recruitment to the US. In most states, there are state-level initiatives undertaken by councils for international education or consortia of community colleges, but these too focus on creating study-abroad opportunities and designing internationally oriented curricula.

### 2.6.2 National policy instruments for international student recruitment

The US has no national tuition fee policy. Tuition fees for international students in the US differ per state and institution. Private institutions usually charge higher fees than public institutions, and top-class institutions charge some of the highest tuition fees in the world. On average, the state of Massachusetts charges the highest tuition fees for international students: US$ 27,746 (approx. € 21,000), while South Dakota charges the lowest: US$ 8,173 (approx. € 6,100). On average, international students in US higher education pay almost US$ 19,000 (approx. € 14,300) a year.[56]

There are several national US scholarship programmes for international students. Most of these programmes focus on postgraduate students and a few target "outstanding" undergraduates. Examples of scholarship programmes supported by the US Department of State are:

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54) Schonhart, S. (2011) 'US Boosts Higher Education Exchanges With Indonesia', in: VOA News, 6 April 2011. URL: http://www.voanews.com/english/news/usa/US-Boosts-Higher-Education-Exchanges-With-Indonesia-119321869.html.

55) Sánchez, F. (2011) 'No better Export: Higher Education', in: The Chronicle of Higher Education, 3 April 2011. URL: http://chronicle.com/article/No-Better-Export-Higher/126989/.

56) NAFSA (2010). The Economic Benefits of International Education to the United States for the 2009-2010 Academic year: A Statistical Analysis. URL: http://www.nafsa.org/_/File/_/eis2010/usa.pdf.

- The Fulbright Fellowship Programme, aimed at promoting mutual understanding between students from the US and students from other countries. Each year, around 8,000 grants are awarded to postgraduates from over 155 countries.
- The Edmund S. Muskie Graduate Fellowship Programme for postgraduate students from central Asia (i.e. the former USSR republics).
- The Global Undergraduate (UGRAD) Exchange Programme, which offers scholarships of up to one year to "outstanding" students from Asia.
- The Community College Initiative Programme, which targets students from a wide range of developing countries in Latin America and Africa, and from other countries including Indonesia and Turkey.

National-level higher education branding initiatives are undertaken by the US Department of State, Study in the USA, and the American Association of Intensive English Programs (AAIEP). EducationUSA has become very active in the international student recruitment effort in recent years, and has established a significant new/social media presence to increase recruitment and outreach efforts. EducationUSA is a global network of over 400 advisory centres in 134 countries, supported by the Bureau of Educational and Cultural Affairs at the US Department of State.

Current US policy aims to make student immigration procedures easier and more transparent. This move follows stricter student visa requirements that were implemented after 9/11. To apply for a US student visa, students need to be enrolled in a full-time programme of an institution approved by the US immigration service. Students on a student visa are allowed to stay in the US for as long as their enrolment lasts. A student visa costs approximately USD 50 (approx. € 38).

The US Department of State has created a new J-1 Visa Exchange Visitor website with information and promotional materials to encourage incoming (non-degree-seeking) exchange students and Summer seasonal workers (the visa programme is not specific to higher education).[57] The Exchange Visitor Programme is aimed at fostering global understanding through educational and cultural exchanges. All "exchange visitors" are expected to return to their home countries after completing their programmes in order to share educational experiences at home. Students coming to the US on this visa programme need to be sponsored by one of the State Department-designated sponsors (e.g. a higher education institution).

When it comes to employment during their studies, depending on the type of student visa, international students in the US are allowed to undertake paid work on campus as long as they are enrolled. Foreign students on a J-1 visa may undertake "Academic Training", which refers to certain types of study-related employment during study. Students need approval from their "sponsor organisation" (i.e. educational institution) to do so.

Foreign students on an F-1 visa (i.e. those attending public secondary/high schools - grades nine through twelve) are allowed to:
- Apply for Curricular Practical Training (CPT), which is an internship, laboratory course or cooperative education sponsored by employers in collaboration with the school. CPT is an integral part of the curriculum and allows students to gain work experience in their field of study while they are enrolled in a full-time study programme; and
- Apply for Optional Practical Training (OPT). This is temporary employment related to the student's field of study. Students can apply for OPT after having been enrolled in a US higher education institution for at least one year. Students that have not yet completed their US studies are allowed to attend OPT for up to 20 hours a week. Full-time OPT is allowed out of term time and after study completion. Students and graduates can receive OPT for up to twelve months at a maximum.

After graduation, international students can apply for a post-study work visa in the US for up to three years.[58] This visa is meant for graduates in selected areas who seek temporary work in occupations as scientists, engineers, and computer programmers.

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57) See the J-1 Visa Exchange Visitor Website at http://j1visa.state.gov/basics/.
58) U.S. Citizenship and Immigration Services (2011) 'H-1B Specialty Occupations, DOD Cooperative Research and Development Project Workers, and Fashion Models. URL: http://www.uscis.gov/portal/site/uscis/menuitem.

US higher education institutions offer many US degree programmes and collaborative programmes abroad, although these initiatives are taken at the institutional level. Various US higher education institutions have established international branch campuses (as distinct from study abroad campuses) in other countries, mainly – but not only – in Asia and the Middle East. These campuses can have various aims, one of which is to recruit additional international students.

### 2.6.3 Implications for the Netherlands

The US will remain one of the most important study destinations worldwide for some time to come. The country has some of the world's very best universities, the quality of its higher education institutions is perceived to be high in many countries in the world, its community colleges are attractive to practically oriented international students, and employers in many countries place a high value on US degrees. Although student visa regulations are strict, the US offers good scholarship opportunities for international students. US scholarships target highly talented postgraduate students, which are useful in the knowledge economy. For many students from Dutch priority recruitment countries, the US is a well-known and attractive study destination that also offers migration opportunities. In these target countries, good promotion of Dutch higher education opportunities therefore remains important.

## 2.7 Canada

There are 87,000 international students enrolled in Canadian higher education, which corresponds to 7,6% of the total student enrolment in higher education.[59] Of all full-time international students in Canada, 67% are enrolled in an undergraduate programme, whereas 33% are postgraduates. The main source countries of international students in Canada are China, the US, France, India and South Korea.

### 2.7.1 National policy strategies for international student recruitment

International student recruitment is becoming a more important policy strategy for Canada. The low birth rate and ageing population will lead to a shortage on the labour market. As a result, the country is becoming more dependent on the immigration of highly skilled workers. The federal government aims to increase the number of international students studying in Canadian higher education, with particular attention to recruiting the "most talented" students. Such a national effort is somewhat difficult to achieve, due to the fact that each Canadian province or territory sets its own higher education policies. This is why a recent publication from the Association of Universities and Colleges Canada (AUCC) called for a national strategy for international student recruitment.[60] At the end of 2010, the Canadian provinces and territories agreed to work together to promote a "national higher education brand" abroad and to make the marketing of international education a priority for 2011.

One of the national policy strategies for student recruitment is to strengthen the international profile of the Canadian higher education sector through efforts by the federal, provincial and territorial governments. This is done through the so-called Edu-Canada branding initiative, which was launched in September 2006 to create and implement a clear national education brand, undertake a marketing campaign in priority countries, provide better services to the education sector, and to help Canadian institutions in establishing international partnerships. More specifically, this initiative has the following aims:

- To increase the number of international students in Canadian higher education by 20% by the end of 2012;
- To achieve a 10% increase in the use of Canadian curricula in other countries; and
- To increase the number of agreements aimed at encouraging student mobility.

59) Association of Universities and Colleges Canada (2010). *Quick Facts*. URL: http://www.aucc.ca/policy/quick-facts_e.html.
60) Association of Universities and Colleges Canada (2010). *Value of a degree in a global marketplace*. URL: http://www.aucc.ca/publications/auccpubs/value-of-a-degree/docs/value-of-a-degree-in-a-global-marketplace.pdf.

Canada's priority recruitment countries are China, India, the US, South Korea, Japan, Mexico, Germany, France and Brazil. In addition, the Canadian government has identified the following target regions for recruitment: the Gulf region, North Africa, the ASEAN countries (including Indonesia, Malaysia, Thailand and Vietnam), and the Caribbean. Canada is steadily entering into student exchange agreements with its target countries. So far, agreements have been signed with various countries including Brazil and India.

### 2.7.2 National policy instruments for international student recruitment

Canada has the following national policy instruments in place for international student recruitment.

Tuition fees for international students vary between provinces and between programmes. The average international fee level in 2010/11 was CAD 16,768 for undergraduates (approximately € 11,860) and CAD 12,368 (approx. € 8,750) for postgraduates.[61)] Compared with the US, Australia and the UK, these fees are low. Because of a political agreement between French-speaking Quebec and France, students from France are not regarded as international students and are charged the same fee as Canadian students.

To promote study in Canada, the number of Canadian institutions offering scholarships for international graduate students has increased by 24% between 2000 and 2006.[62)] One example is the Vanier Canada Graduate Scholarship programme, which offers scholarships to Canadian and international doctoral students in Canada. Canada also offers bilateral scholarship programmes with specific countries, such as the US. The Fulbright Programme offers scholarships for US postgraduates who wish to enrol in or continue a postgraduate programme in Canada (and vice versa). Another example is the (more recent) Globalink Canada-India Graduate Fellowship, which enables "top-class" Indian students to enrol in master's or PhD programmes in Canada. In addition, Canada's International Development Research Center (IDRC) provides master's, PhD and postdoctoral scholarships for students from developing countries who study in Canada and who will contribute to the sustainable development of their own countries when they return. Canada also provides research grants for researchers who help increase insight into Canada through publications abroad. Other research grants are intended to fund research that will help improve understanding of the relationship between Canada and other countries or regions.

Canada has made its student visa system more internationally competitive. International students studying in Canada for longer than six months need a study permit, which costs CAD 125 (approximately € 88). Such a permit allows students to seek part-time, on-campus employment of up to 20 hours per week. To obtain a study permit, students need to provide proof of having sufficient funds to study in Canada and proof of acceptance from a Canadian higher education institution. Off-campus paid work by international students is only permitted on a separate work permit, for a maximum of 20 hours a week during term-time and full-time during holidays. Students who initially did not need a study permit because they intended to stay in the Canada for less than six months and who wish to extend their studies in Canada, need to leave the country in order to apply for a study permit.

International students can only apply for a work permit after graduation if they have been full-time students at a Canadian higher education institution for at least eight months. International students that graduated from a Canadian higher education institution can apply for permanent residency after at least one year of full-time study in Canada. They also need to have a good command of the English or French language. A permanent residency application needs to be submitted while working in Canada, and the graduate should plan to live outside of Quebec. Skilled workers wishing to live in Quebec have to undergo a separate selection process before they are allowed to apply for permanent residency. In 2010, the provinces of Ontario, British Colombia and Manitoba accelerated the permanent residence application procedure for highly skilled foreign graduates. Graduates from master's and PhD degree programmes in these provinces are now allowed to apply for permanent residency without having secured a job offer.

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61) Statistics Canada (2010). *Universities tuition fees*. URL: http://www.statcan.gc.ca/daily-quotidien/100916/dq100916a-eng.htm

62) Association of Universities and Colleges Canada (2009). *International students at Canadian Universities.* URL: http://www.aucc.ca/policy/priorities/international-students/documents/International-Students-Fact-sheet.pdf.

Since English and French are both official languages in Canada, international students can study either in an English or a French programme. There also is a bilingual university. Canadian institutions offer English as a Second Language (ESL) and French as a Second Language (FSL) programmes.

The Canadian Council of Ministers of Education developed an "Imagine education au/in Canada" campaign, which is the visual identity of the Edu-Canada brand. As part of the campaign, a website was designed to allow international students to search for information on the Canadian education system and on programmes for international students offered by Canadian institutions, study costs and scholarship options, and visa application procedures.[63)]

Canadian universities offer programmes abroad and joint degree programmes with foreign institutions. These programmes help attract international students to Canadian programmes. There are also three small Canadian branch campuses (in China and Qatar).

### 2.7.3 Implications for the Netherlands

Given the increased attention to international student recruitment and intensifying collaboration between the provinces and territories, Canada is likely to become a stronger competitor on the global international student market. As an English and French-language destination, Canadian higher education is attractive to international students. After graduation, students in Canada are allowed to stay and work in Canada for up to three years (compared with one year in the Netherlands). On average, the costs of a Canadian study permit and tuition fees for international postgraduates are lower than the Dutch fees. Compared with the Netherlands, Canada also offers better scholarship opportunities for talented master's and PhD students.

## 2.8 Australia

Australia is one of the top five study destinations in the world for international students. The majority of international students in Australia are from Asia – due to Australia's relative proximity, good-quality higher education and English-taught provision. In terms of enrolment numbers, the two top countries of origin of international students in Australian higher education are China (in 2010, nearly 36% of all international students in Australia were Chinese) and India (10%).[64)] Between November 2009 and November 2010, enrolments and commencements from China grew by 19% and 18%, whereas enrolments and commencements from India declined by 19% and 45% (the latter following a series of attacks on Indian students in Australia in the past two years). Australian higher education also receives large numbers of students from Malaysia, Indonesia, South Korea, Vietnam and Thailand.

In 2008, the top five countries of origin of international students in onshore Australian higher education were China, India, Malaysia, Hong Kong and Indonesia. The top five countries of origin in off-shore Australian higher education were Singapore, Malaysia, China, Hong Kong and Vietnam.

Approximately 5.8% of all international students in Australian higher education are enrolled at postgraduate research level (i.e. studying for a research master's or a PhD). Management and Commerce was the top broad field of education.

### 2.8.1 National policy strategies for international student recruitment

With the international education industry reportedly providing 15% of the combined revenues of Australian universities, the country places great emphasis on international students as sources of revenue. The international student market is Australia's third largest source of export income. Australia is highly experienced in recruiting students from the Asian markets.

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63) See: Council of Ministers of Education Canada (2011). *Imagine studying in Canada Website.* URL: http://www.educationau-incanada.ca/educationau-incanada/index.aspx.

64) Department of Education, Employment and Workplace Relations (2010) 'Monthly Summary of International Student Enrolment Data – Australia – YTD November 2010'. URL: http://aei.gov.au/AEI/Statistics/StudentEnrolmentAndVisaStatistics/2010/2010Nov_MonthlySummary_pdf.pdf.

Australia's target countries for international student recruitment are China (including Hong Kong), India, South Korea, Indonesia, Malaysia, Thailand, Vietnam and Singapore. These countries have largely been selected because geographically they are relatively close to Australia, and (with the exception of Singapore and Hong Kong) they have a growing young population eager to enter higher education coupled with growing financial means to do so.

The Baird Review of Australia's *Education Services for Overseas Students (ESOS) Act 2000* was published in February 2010.[65] The report made a number of government recommendations (i) to ensure that international students in Australian education are better supported and protected and (ii) to improve regulation of Australia's international education sector and maintain Australia's reputation as a high-quality study destination.

In October 2010, the Council of Australian Governments published its International Students Strategy for Australia.[66] This strategy is to ensure a high-quality experience for international students, in order to safeguard a sustainable future for good-quality international education in Australia. The International Students Strategy outlines initiatives in four key areas: international student well-being, quality of higher education, consumer protection, and offering better information to international students.

### 2.8.2 National policy instruments for international student recruitment

Australia has the following main national policy instruments for international student recruitment in place.

The Australian government has positioned education counsellors at Australian embassies abroad to help build strong education partnerships internationally. These offices serve indirectly as vehicles for promoting international student recruitment to Australia. The offices are located in China, Europe, India, Indonesia, Japan, South Korea, Malaysia, North America, Taiwan, Thailand and Vietnam.

Australian higher education institutions offer a high number of degree programmes abroad, e.g. through overseas branch campuses of Australian institutions. Of all international students enrolled in Australian higher education institutions in 2008, a third studied for an Australian degree outside of Australia.

Government scholarships for international students target postgraduate research students. The Department of Education, Employment and Workplace Relations offers scholarships (approximately 230 in 2009, involving a total sum of AU$ 21,300, or € 15,947) to international postgraduate students. These scholarships are allocated as part of four scholarship programmes, two of which are open to applications from a wide range of countries, with the other two programmes targeting students from Asia and Europe. The Department of Innovation, Industry, Science and Research and AusAID also offer postgraduate scholarships to international students.

In the past two years, the Australian international higher education sector has come under increasing pressure as a result of the rising value of the Australian dollar, the ongoing international financial downturn, several attacks on Indian students in Australia, and growing competition from both established and newly emerging recruitment countries for international students. In response to the international economic downturn and concerns about faltering overseas enrolments, a 'Study in Australia 2010' campaign was launched in March 2010 targeting potential students in China (including Hong Kong), India, South Korea, Indonesia, Malaysia and Thailand. Since markets in some countries have been slowing (e.g. Singapore), Australia has been quick to implement measures to develop more active recruitment campaigns in other markets, such as Vietnam and Nepal.

Since the publication of the Baird Review, Australian and state governments have taken several measures to improve regulation. The ESOS Act was amended to require all international education providers to re-register (by 31 December 2010) under tighter new regulatory criteria (e.g. providers must have the principal purpose of providing education, and must clearly demonstrate the capacity to provide education at a satisfactory standard).

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65) Australian Government (2010) *Stronger, simpler, smarter ESOS: supporting international students. Review of the Education Services for Overseas Students (ESIOS) Act 2000. Final Report – February 2010 (The Baird Review)*. URL: http://www.aei.gov.au/AEI/GovernmentActivities/InternationalStudentsTaskforce/ESOS_REview_Final_Report_Feb_2010_pdf.pdf.

66) Council of Australian Governments (2010) *International Students Strategy for Australia 2010-2014*, op.cit.

This was done to ensure that only *bona fide* providers remained in the sector. Other amendments include the requirements for all international education providers in the country to publish a list of recruitment agents operating on their behalf, and to ensure greater transparency. Furthermore, 2011 will see the establishment of the Tertiary Education Quality and Standards Agency (TEQSA) and the National VET (i.e. vocational education and training) Regulator that will both have jurisdiction over registered higher education and VET providers in relation to international students.

In early 2011, the federal government consulted with the international education sector and states and territories on other recommendations in the ESOS review, which were intended to provide better support, clear and accurate information and consumer protection for international students. The second part of the government's response to the Baird Review is expected in the second half of 2011.

Following the publication of the Council of Australian Governments' International Students Strategy for Australia, several policy measures have been taken or announced. To improve international student well-being, a student personal safety guide has been published, higher education providers are required to implement a student safety plan, international students have to provide evidence of health insurance, a strategy is being developed to engage international students with local communities, and an international student consultative committee will be set up. According to the strategic document, international students will receive better information on study options, government services and tuition fees through a "Study in Australia" website. International students were to be (and have been) given improved access to complaints and appeals procedures.

In early 2011 the federal government held a review of the country's student visa system in light of the recent collapse in demand from overseas students. The review followed a previous government decision to tighten the rules that allowed international students to gain permanent residency in Australia after completing their studies. Several visa-related initiatives have already been announced:

- Visa assessment levels for international students were lowered in April 2011;
- Pre-paid boarding fees may be counted towards students' cost of living requirements in their visa applications;
- Information exchange between the government and the international education sector will be improved, e.g. through the provision of a quarterly statistical publication to enable the sector to track emerging student visa trends; and
- International "level 4" VET students are now allowed to undertake a package of certificate level courses to meet visa requirements.

Australia allows student visa holders to work in paid employment for a maximum of 20 hours a week, and in full-time employment during holidays. No separate work permit is required. This fairly generous regulation provides students with the opportunity to interact with the local community, acquire income, improve their language skills and develop professional expertise. Dependants of master's or doctoral degree students (such as family members) may undertake full-time paid work; all other student dependants may undertake paid work up to a maximum of 20 hours.

At the moment, post-study work opportunities are enabled through the "Skilled-Graduate visa". This visa allows international students who do not meet the criteria for a permanent "skilled visa" to live and work in Australia for up to eighteen months after graduation in the country. In this period, graduates are allowed to undertake a "professional year", gain skilled work experience and improve their English-language abilities. Some of these graduates with occupations on the "Skilled Occupation List" (SOL) subsequently qualify for a permanent skilled visa. They can also try to find an Australian employer to "sponsor" them on a "business (long stay) visa".

### 2.8.3 Implications for the Netherlands

Australia's main pull factors for international students are the excellent reputation of its higher education degree programmes and the fact that programmes are taught in English. For Asian students, Australia is attractive as a high-quality and nearby "Western" study destination that has a long tradition of educating Asian students. Australia also has a large foreign alumni base.

It is difficult to outline specific implications of Australian developments for the Netherlands, since there are so many other factors influencing the worldwide international higher education student market. Three aspects are worthy of note:

- Australian government scholarship programmes target postgraduate students only;
- Australia currently places strong emphasis on improving support mechanisms for international students; and
- Australia has shown to be capable of implementing effective recruitment strategies in well-known recruitment countries, but also in relatively untapped markets. This could enable the country to further strengthen its position in the global international student market.

## 2.9 Singapore

Singapore's higher education sector is one of the most internationalised in the region, and approximately 10% of its higher education students are from abroad. At the moment, the government has capped international student enrolment at Singapore's public higher education institutions at 20%. After several years of annual increases, the number of international students in Singapore dropped by 4,000 between August 2009 and August 2010 to 91,500, according to figures from the Immigration and Checkpoints Authority, which issues student visas.[67] This decline is reportedly due to the introduction of tighter operating requirements set by the Singaporean government in 2009: institutions that used to enrol international students but were unable to meet the higher standards were barred from enrolling new international students.

### 2.9.1 National policy strategies for international student recruitment

Singapore is marketing itself among international students as a regional higher education centre of excellence, a higher education hub for South-East Asia. The city state is strategically positioned within the Asian higher education market, one of the world's fastest growing student markets. Singapore has not published a fixed list of target recruitment countries, but targets students from the broad East-Asian region in particular. In 2007, there were 86,000 international students from 120 countries studying in the city state.[68] The largest groups of foreign students in Singapore are from China, Malaysia and Indonesia, followed by India and Vietnam.

The Singaporean government aims to attract 150,000 international students by 2015 to study at both private and state-run institutions. To achieve this, the government and Singapore's Economic Development Board have set the following strategies:

In 2003, the Economic Development Board initiated its Global Schoolhouse initiative, aimed at attracting world-class foreign institutions and international students, while also developing Singapore's local institutions and education industry. These "top-class" foreign universities offer degree programmes in the city state, sometimes in collaboration with local institutions, to provide more study options. The 1997 government target of attracting ten foreign world-class universities within a decade was reached in 2007. Today, Singapore is home to sixteen distinguished foreign tertiary institutions including INSEAD, DigiPen Institute of Technology and the German Institute of Science and Technology. This strategy of attracting top-class institutions and students to Singapore is part of a wider aim, namely to enhance capacity development and to attract and retain talent for emerging key growth industries in Singapore. In turn, this pool of talent is expected to help attract more world-class multinational corporations to undertake research and development activities in the country. The initiative has strengthened Singapore's reputation as an international "talent hub" in attracting and retaining talented students and staff.

Singapore is promoting its higher education internationally based on an "East Meets West" formula, which has become an effective marketing tool. With prominent ethnic Chinese, Indian and Malay communities living in the city state, students from Singapore's more established Asian markets (China, India and Indonesia in particular, but also ASEAN member countries Malaysia, Myanmar and Vietnam) find in Singapore a different, yet familiar

67) Davie, S. (2010). 'Singapore attracting fewer foreign students', in: *The Straits Times*, 11 November. URL: http://www.blogcatalog.com/blog/education-in-singapore/0d061d5f9d605f66d1419af60f805f8d.

68) Singapore Economic Development Board Website (2010). 'Industry background'. URL: http://www.sedb.com/edb/sg/en_uk/index/industry_sectors/education/industry_background.html.

international study experience. Singapore's multicultural society is also attractive to students from outside Asia because it is multilingual, includes an English-speaking community and offers a safe living environment. For Western students, Singapore can be attractive because it is perceived as the most "Western" of Asian countries in socio-economic terms.

Singapore offers broad-based and career-oriented curricula, strongly focused on innovation and entrepreneurship. Its international marketing of higher education programmes is undertaken as part of a "pro-business" strategy, which actively integrates higher education and skills training into the economy to turn Singapore into one of the world's main hotspots for global talent. Since more than 7,000 multinational companies and 60 international organisations are based in the city state, international students in Singapore have access to one of Asia's most dynamic economies and a gateway to the continent.

### 2.9.2 National policy instruments for international student recruitment

Singapore's main national policy instruments for international student recruitment are the following.

The Singaporean government provides financial support to "world-class universities" to establish operations in Singapore. For instance, the British-Singaporean joint medical college, to be opened in 2013, has received a S$ 150 million (over € 86.8 million) donation from the Lee Foundation, supplemented by S$ 250 million (nearly € 145 million) of government funding.[69] For higher education institutions in Singapore yet to be established, the government promised to allocate S$ 3 (€ 1.70) for every donated dollar in an endowed fund for the first ten years, and S$ 1.50 (€ 0.87) for every subsequent dollar.[70] Existing "world class" institutions receive 1.5-to-1 matching government funds for up to 20 years.

To maintain its position as one of the world's leading education hubs, Singapore is committed to achieving high standards across the private education industry. The Ministry of Education has announced plans to introduce a new Private Education Act to enhance regulation in the private education sector, in order to raise the standards of private education providers over time. This is expected to strengthen Singapore's international education brand.

International students in Singapore on a student visa are not allowed to undertake paid work alongside their studies. There are options for workplace positions and postgraduate employment opportunities with leading knowledge-based industries (such as biomedical services, tourism, and interactive media design) for international students. However, to take advantage of this, international students need to apply for a training employment permit.

In 2010, a differentiated, increased tuition fee for international students was introduced at Singapore's three public universities to differentiate between "citizens" and "non-citizens". Annual international student fees at these institutions average S$ 12,600 (€ 7,320) for both science and social science students, which is approximately two to four times as low as fees charged in the UK, Canada, Australia and the US (and lower than Dutch international student fees at master's level, but comparable to Dutch undergraduate international student fees). Singaporean fees for international students (in combination with high-quality education) therefore remain internationally competitive.

The main reason for Singapore's comparatively low international tuition fees is that international students – as long as they agree to work in Singapore for three years after graduation in the city state – enjoy generous tuition fee subsidies, depending on their course programme. Last year, only 5% of international students at Singapore's public universities reportedly paid full, unsubsidised fees. Singapore's public university fees for international students are higher than those charged at top-class universities in Japan, but Singaporean institutions remain competitive since they teach many more courses in English, compared with Japanese universities.

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69) Tan, A. (2011) 'Record $400m for NTU's medical school', *The Straits Times*, 5 January. URL: http://www.straitstimes.com/BreakingNews/Singapore/Story/STIStory_620749.html.

70) Sharma, Y. (2010) 'Singapore: New Universities Trust to ensure funding', in *University World News*, 2 September. URL: http://www.universityworldnews.com/article.php?story=20100902081004138; Tan. A. (2011), op.cit.

### 2.9.3 Implications for the Netherlands

Singapore is an attractive study destination for international students due to its bilingual policy and the widespread use of English, good higher education infrastructure and facilities, and a multicultural environment. For students from other South-East Asian countries, Singapore is attractive as a nearby study option with high-quality and relatively Western-style degree programmes. Singapore's engineering and science programmes are particularly attractive to international students.

For the Netherlands, the most interesting Singaporean policy strategies and instruments to note are the following:

- Singapore's higher education and research strategy is intertwined with the national economic strategy, which is a major strength.
- Singapore uses collaborative degree programmes with top-class universities from abroad as a strategy to attract more international students.
- Singapore has invested in realising an excellent research infrastructure, which is highly attractive to talented students and researchers.
- Singapore offers student scholarships and allows students to stay and work in Singapore after completing their studies in the city state.

## 2.10 Malaysia

Malaysia is a rapidly emerging competitor in the recruitment of international students. The country hosts approximately 80,000 international students from over 100 countries, which are attracted by its first-rate higher education, relatively low tuition fees, its harmonious multicultural society, political stability and the widespread use of English.[71] Since the government's previous target of having 80,000 international students by 2010 was reached, a new target was set to attract 150,000 international students by 2015, focusing on postgraduate and sponsored international students in particular.

### 2.10.1 National policy strategies for international student recruitment

Given the locations of the Malaysian Education Promotion Centres, Malaysia's main target countries for international student recruitment are China, Indonesia and the United Arab Emirates (UAE). China and Indonesia are targeted because they are the largest student markets in the region and because they share language similarities with Malaysia's Chinese communities and the Malaysian language, respectively. Indonesia and the UAE are target markets due to socio-cultural and religious similarities they share with Malaysia.

Malaysia's second group of target countries includes Taiwan, South Korea, Vietnam and Thailand, because they are neighbouring nations with established or growing middle classes and high-performing or growing economies, and because in several of these countries there is an increasing demand for higher education places.

The third group of countries targeted by Malaysia includes Russia, Australia, the Middle East (including Iran, Jordan and Saudi Arabia) and Africa. Malaysia is promoting itself in Islamic nations as a good study destination that has socio-cultural and religious similarities with these targets. In recent years, the Malaysian government has stepped up its recruitment efforts in African countries, such as Botswana, Tanzania and Mauritius, all of which are developing nations in need of human capital development and whose training needs Malaysia, as a former developing country, understands well, according to the government.

Last June, the Higher Education Ministry announced that it had identified four core study areas for international student recruitment: Islamic banking and finance, advanced engineering, hospitality and health sciences. The ministry believes that this focus on four core areas will help the country to strengthen and develop its position as an international higher education hub.

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[71] Ministry of Higher Education, Malaysia Website (2011). *'Malaysian Education: Malaysian Centre of educational excellence'*. URL: http://www.mohe.gov.my/educationmsia/education.php?article=malaysia.

Overall, one of the main strengths of Malaysia's marketing approach (particularly in Islamic countries) is the fact that the country is marketing itself as a "regional centre of educational excellence" in a context that still recognises the importance of Islamic traditions and values.

### 2.10.2 National policy instruments for international student recruitment

Malaysia's main national policy instruments for international student recruitment are the following.

The Malaysian Ministry of Higher Education operates an education marketing division that promotes Malaysian higher education locally and abroad and seeks international recognition of Malaysian degrees and development of foreign collaboration in the area of joint degree programmes. In the Spring of 2011, the Malaysian government signed an agreement on mutual degree recognition with the Chinese government, and it is seeking ways to allow credit transfer by Australian students to study at Malaysian universities for at least one semester. Such agreements are expected to boost student exchange between the countries involved. Another initiative to facilitate incoming international student mobility is the government's decision to change the start of term at all public universities in Malaysia in 2011 to coincide with the academic calendar of universities in the West and neighbouring Asian nations.

To address concerns about quality standards triggered by the increase in international student numbers, the Malaysian government requires all higher education providers in the country to be accredited by the Malaysian Qualification Agency by 2011. The government is also considering to introduce licenses for international recruiting agents.

The government is encouraging internationalisation of its universities and has stated that top-class universities must recruit around 20% of their academic staff from abroad. Among other things, this measure is expected to make Malaysian higher education more attractive to international students.

To promote Malaysian higher education abroad and make the country a "centre of educational excellence", the Ministry has established four Malaysian Education Promotion Centres. These centres are located in China, Indonesia, Dubai (the United Arab Emirates) and Vietnam, but each targets a wider range of countries in the region.

The government has allowed several foreign institutions to establish branch campuses in the country. These institutions enable international students to acquire good-quality degrees in a country where the cost of living is relatively low. An increasing number of international students are recruited to these branch campuses.

The Malaysian government is establishing a higher education hub, called EduCity. Designed as part of the Iskandar Malaysia economic development zone, EduCity will become a base for at least seven higher education institutions and offer housing for at least 4,000 international students. The development zone is to become an international hub of universities, businesses and research centres, and is a vital component of Malaysia's Economic Transformation Programme. Announced in 2006, Iskandar Malaysia is expected to be completed by 2025. Total investment in the zone (by the Malaysian government and foreign companies) has already topped US$ 20,26 billion (€ 14.16 billion).[72)]

In 2011, the (UK-Malaysian) University of Newcastle Medicine Malaysia (NUMed) opened enrolments in EduCity. Scheduled projects for the hub include a campus for the Netherlands Maritime Institute of Technology (to open in 2012) and a campus of the Management Development Institute of Singapore (to open in 2013). The Malaysian government hopes to attract more world-class foreign universities to EduCity in the future. Importantly, the universities setting up campuses in EduCity would act as "feeders" into the businesses that are being developed in Iskandar Malaysia, enabling graduates to find employment in Malaysia's growing labour market.

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72) Kolesnikov-Jessop, S. (2010). 'Malaysia tries to lure world-class institutes', *The New York Times*, 19 December. URL: http://www.nytimes.com/2010/12/20/world/asia/20iht-educSide.html?_r=2.

Several of Malaysia's private higher education institutions have started to export their degree programmes to other countries, and a few have opened small campuses or teaching centres in China or India. Strong Malaysian government support, coupled with concerted efforts to improve student facilities and services, have helped these institutions to gain a better standing and academic credibility abroad. In another private sector initiative, and in line with the Malaysian government's aims to turn the country into a regional higher education hub, the Royal Commonwealth Society Malaysia recently launched a scholarship programme largely aimed at enabling students from Commonwealth nations to study in Malaysia.

Malaysia has relatively quick and hassle-free immigration procedures for international students. Furthermore, full-time international students in Malaysia are allowed to work for up to 20 hours a week during their studies.

### 2.10.3 Implications for the Netherlands

With improving quality of higher education at a low cost, Malaysia is becoming a competitor in the international student market. The country targets seven of the ten Dutch priority recruitment countries, most of which are Malaysia's direct or close neighbours. With more Asian students looking to study abroad within their own region[73], Malaysia may become a more attractive study destination to students from other Asian nations.

## 2.11 China

A decade ago, China mainly sent students abroad to gain a high-quality education. In recent years, however, the Chinese government has developed and implemented an increasingly coherent strategy to attract international students (and staff). In 2009, international student enrolments in China exceeded 230,000, and the number of countries of origin, host institutions and Chinese government scholarship-supported international students all increased. In 2009, the top countries of origin of international students in China were South Korea (providing 27% of all international students in China), the US (8%), Japan (6%), Vietnam (5%), Thailand (5%), Russia (4%), India (4%), Indonesia (4%), Kazakhstan (3%) and Pakistan (2%).[74]

Based on their good quality of education, 465 higher education institutions in China have been designated by the government as suitable to enrol international students. Annual tuition fees for international students range from € 1,600 to € 2,900 for bachelor's programmes, from € 2,000 to € 3,400 for master's programmes, and from € 2,500 to € 3,800 for doctoral programmes. The majority of international students in China are registered in short-term courses taught in Chinese. Nearly 40% of all international students in China are enrolled in degree programmes, and this percentage is increasing. Eighty percent of international degree students are enrolled at bachelor's level. The most popular degree programmes among international students in China are Mandarin, fine arts and medicine. Science, business and management courses are also becoming more popular.

### 2.11.1 National policy strategies for international student recruitment

The Chinese government has not published a list of core target recruitment (and cooperation) countries, but the Ministry of Education website states that China is "taking major countries as the focal point, neighbouring countries as of primary importance, [and] developing countries as the basis".[75] The "major countries" (non-neighbouring) are not defined in public documents, but likely include the US, Russia and India – the last two being growing student markets. In terms of neighbouring countries, in 2010 the Chinese State Councillor proposed that China and the Association of Southeast Asian Nations (ASEAN) should study the feasibility of regional educational integration to encourage regional student exchange. China's aim is to receive 100,000 exchange students from ASEAN countries, and to send 100,000 exchange students to ASEAN nations, by 2020.[76]

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73) UNESCO Institute for Statistics (2009) *Global Education Digest 2009: Comparing education statistics across the world*. Montreal: UIS, p.39.
74) Ministry of Education of the People's Republic of China (2010) 'International Student Enrollments Exceeded 230,000 in 2009'. URL: http://202.205.177.9/edoas/en/level3.jsp?tablename=1245221141523299&infoid=1270004328109676.
75) Ministry of Education of the People's Republic of China (2009). 'Development of the Opening Up of China's Education and International Students Studying in China'. URL: http://202.205.177.9/edoas/en/level3.jsp?tablename=1245221141523299&infoid=1253254646792277.
76) Ministry of Education of the People's Republic of China (2010) 'Chinese state councilor proposes integrated education with ASEAN countries'. URL: http://202.205.177.9/edoas/en/level3.jsp?tablename=1245221060103297&infoid=1281320942932245.

The Chinese government has also established a wide range of student exchange programmes with many African nations, as part of a broader economic cooperation agenda. Yet, China is strategically targeting students from a widening range of countries, and Chinese government scholarship programmes for international students are aimed at many different world regions, including countries in Europe, Latin America, Canada and Australia.

China's current education reform plan promotes internationalisation and cooperation with world-class universities and research organisations. It proposes to negotiate more extensive mutual recognition arrangements with other countries and to expand the international student population in China. The Chinese government aims to have 500,000 international students enrolled in Chinese higher education by 2020 and to make China Asia's top destination country for international students. To reach these targets, the government has entered into agreements with foreign education ministries. Representatives from China and France, for instance, agreed to increase the number of French students studying in China by 10,000 over the coming five years. In 2009, the US President also announced his intention to send 100,000 more US students to study in China by 2013.

The National Outline for Medium and Long-term Education Reform and Development, published by the Ministry of Education in 2010 (but still under development), states the following strategies:

- To increase the number of international students in the country (as mentioned above);
- To increase the number of Chinese government scholarships for international students;
- To subsidise study in China for more students from developing countries;
- To expand the number of higher education programmes taught in foreign languages;
- To enhance the quality of education for international students; and
- To implement the Planning of Study Abroad in China programme, in order to increase incoming international student mobility.

Government documents indicate that once the Planning of Study Abroad in China programme has been launched, the central and regional governments and higher education institutions will promote the development of international education more actively and place more emphasis on quality education and standard management procedures.

### 2.11.2 National policy instruments for international student recruitment

China has implemented several policy instruments to promote student exchange and attract international students. Firstly, the government offers a range of scholarship programmes for international students, targeting students from Asia (ASEAN countries in particular), the EU (with EU students to learn Chinese in China), Pacific island nations, and postgraduate students from countries worldwide. In 2009, 18,245 international students in China received a Chinese government study grant (this corresponds to 7.7% of all international students in China). In recent years, the Chinese government has increased the amount of scholarship support to international students. Between 2010 and 2020, 10,000 government scholarships will be allocated to enable students from ASEAN countries to study in China.[77)]

Secondly, the Chinese government has signed agreements on the mutual recognition of qualifications and degrees with at least 34 countries and regions in the world. The government has expanded and deepened student (and staff) exchanges and higher education collaboration with approximately 188 countries or regions in the world (including education collaboration and exchanges with the EU). Furthermore, at least 305 Confucius Institutes and Chinese schools have been established in nearly 80 countries and regions. These institutes promote Chinese language and culture studies abroad, and thereby prepare students for future studies in China. The Ministry of Education website provides a detailed list of English-taught programmes that are offered in Chinese higher education institutions.

77) Ministry of Education of the People's Republic of China (2010). 'Chinese state councilor proposes integrated education with ASEAN countries', op.cit.

Thirdly, the Chinese government offers a one to two-year undergraduate foundation programme (i.e. a preparation programme) for international students that are in China under a Chinese government scholarship programme and lack the necessary knowledge and skills to start their degree programmes in China. The Education Ministry is also developing a Chinese language proficiency test to prepare international students for studies in China. In addition, to a limited extent the government encourages specific prestigious foreign universities to establish branch campuses in China in collaboration with Chinese institutions. Among other things, these joint venture campuses are a way of attracting not only more Chinese, but also more international students.

Tuition fees for international students are not set centrally in China. Fees vary between institutions and programmes, ranging from US$ 1,700 a year for undergraduate arts programmes to US$ 8,400 a year for a doctorate in science and technology.

In China, student visas (X-visas for study-related purposes of less than six months and F-visas for studies longer than six months) do not allow international students to undertake paid employment during their studies. Only in exceptional cases can students apply for a work visa. This is possible, for instance, for students that have studied at an approved Chinese language centre for at least twelve months and have shown excellent study progress. Another condition for work visa eligibility is that the Chinese higher education institution where the student is enrolled must certify one of the following facts:

- A personal or family crisis affects the student's finances to the point that the student is unable to continue his or her studies or to support him/herself. Documentary evidence must be presented by the student for verification.
- The educational or research department of the school where the student is enrolled requires his or her assistance in the form of employment.
- The student's training or research requires related employment experience outside the school as part of the course.
- The student employee's special skills or qualifications will raise the national standard of specialised knowledge in a relevant field.

A separate one-year work visa may then be issued, allowing students to work for up to twelve hours a week. Students with "specialist language abilities" may apply for a separate work permit to teach languages during their studies in China.

### 2.11.3 Implications for the Netherlands

As an important economic world power, China is rapidly becoming an interesting student destination for international students worldwide. The Chinese government is taking more and more measures to recruit international students, targeting many regions of the world. International student mobility flows are gradually starting to shift from "east to west" to "west to east", and China is likely to become an increasingly important competitor – to the Netherlands and other countries – in the global market for international students.

## 2.12 Conclusion

### Recruitment rationales and strategies

### 2.12.1 Rationales for international student recruitment

In many of the researched countries, including the Netherlands, there are two main rationales for national efforts in international student recruitment: 1) international students are thought to increase the quality of education, and 2) international students contribute to the further development of a knowledge society and economy. In some countries, such as Germany and Canada, the declining or low birth rate and ageing population forms an additional reason for attracting international students and highly skilled professionals. International students who stay in Germany or Canada as highly skilled workers can help cover future labour market shortages and boost the national economy in the future.

In other countries, particularly in the UK and Australia, national strategies focus on recruiting high tuition fee-paying international students, since tuition fee income accounts for a large proportion of many institutions' revenues and has a large impact on their financial sustainability. In this respect, the UK recruitment effort is particularly targeting non-EU/EEA students, who normally pay higher fees than EU/EEA/domestic students.

The tuition fee income argument is not always dominant, however. In the US, one rationale for international student recruitment is that international students make an important contribution to the US economy (nearly US$ 19 billion in 2009/10 alone). However, In the US, international student recruitment is primarily seen as an important strategy to increase mutual understanding and strengthen ties with rapidly developing Islamic nations with which US relations have at times been tense. In addition, US strategies focus on expanding educational opportunities for students in emerging economies to help develop a middle class in those markets. That middle class will in time be able to buy US goods and services, thus boosting the US economy in the long run. International student exchange can thus help lay the foundations for future economic trade relations.

### 2.12.2 Target countries and rationales

Of the countries that are actively recruiting international students (and that have been researched in this chapter), the Netherlands and the UK have published a detailed list of priority recruitment countries (in the case of the UK, this list is quite long). Other countries, including France, Germany, Canada and China, have not drawn up a specific and limited list of priority recruitment countries. Instead, they target a very wide range of countries, although a national focus on specific target countries can be deduced from recent international student recruitment programmes and initiatives (the latter is also the case for Switzerland). Australia, Singapore and Malaysia make explicit efforts to become, or remain, international student destinations within the Asian region. Table 1 gives an overview of the main target recruitment countries that are analysed in this chapter.

*Table 1: Target recruitment countries per country studied*

| *Target countries:* | The Netherlands | France | Germany | Switzerland | UK | US | Canada | Australia | Singapore | Malaysia | China |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Brazil | X | X | X | X | X | | X | | | | |
| China | X | X | X | X | X | | X | X | X | X | - |
| India | X | X | X | X | X | X | X | X | X | | X |
| Indonesia | X | X | X | | | X | | X | X | X | X |
| Mexico | X | X | | | X | | X | | | | |
| Russia | X | X | X | X | X | | | | | X | X |
| South Korea | X | X | X | X | X | | X | X | X | X | X |
| Taiwan | X | X | | | X | | | | X | X | - |
| Thailand | X | X | X | | X | | | X | X | X | X |
| Vietnam | X | X | X | | X | X | | X | X | X | X |
| Malaysia | | X | | | X | | | X | X | - | X |
| Japan | | | X | X | X | | X | | | | X |
| Singapore | | | X | X | X | | | X | - | | X |
| Australia | | | | | X | | | - | | X | |
| Canada | | | X | X | X | | - | | | | |
| US | | | X | X | X | - | X | | | | X |
| Germany | | | - | | | | X | | | | |
| France | | - | | | | | X | | | | |
| Chile | | | | X | | | | | | | |
| Egypt | | X | | | | | X | | | | |
| Middle East (UAE, Iran, Jordan, Saudi Arabia) | | | | | | | | | | X | |
| Africa (Botswana, Tanzania, Mauritius) | | | | | | | | | | X | |
| South Africa | | | | X | | | | | | | |

NB. France, Germany and the UK in reality target a very wide range of countries, if not nearly all countries worldwide. Only the most important target countries are mentioned here (as appears from recent initiatives and the multiple location of promotion and recruitment offices in target countries).

The countries researched in this report show similarities in terms of their core targets for international student recruitment. The BRIC countries (Brazil, Russia, India and China) in particular, are targeted by nearly all of the recruiting countries because they are growing economic (spending) powers with large and relatively young populations, and a high demand for more and good-quality higher education places.

Indonesia, Vietnam, Thailand and Malaysia are often targeted as priority recruitment countries for the same reasons as the BRIC countries. South Korea is targeted by several countries because studying abroad is a popular option for Koreans, as it improves their employment prospects at home. Former colonies remain important sources of international students, particularly for France and the UK, but priority recruitment countries are shifting to new economic powers in Asia, Latin America and the Middle East. There are two main reasons for this. First, these countries form lucrative student markets since they often have a high demand for, and a shortage of, higher education places at home. Second, as their economic spending power increases, these countries are attractive partners for long-term strategic higher education and economic ventures.

In general, all ten target countries that are prioritised by the Dutch government frequently appear as priority recruitment countries of other nations as well. France, Germany, the UK and Canada target a wide range of countries, including all, or nearly all, Dutch priority countries (i.e. Brazil, China, India, Indonesia, Mexico, Russia, South Korea, Taiwan, Thailand and Vietnam). Switzerland, which has a clearly focused strategy in place to become a "world class destination for thought and work", targets five of the Dutch priority countries.

The US has no national list of priority recruitment countries and targets countries all over the world, although recent national efforts focus on increasing student exchange with, and recruitment from, India, Indonesia and Vietnam – which are also Dutch priority countries. These countries are targeted not merely because of their large potential student markets. As indicated above, in the US, international student recruitment is mainly used to help create a more friendly foreign policy and promote "peace building" through "citizen diplomacy", since US relations with several countries, including Islamic nations, have sometimes been tense. The US also uses international student recruitment and exchange as a strategy to help lay the foundations for future economic trade relations.

The US believes that the increased economic spending power in East-Asian target recruitment countries will lead to more consumption of US products in these countries. Increased student exchange and international higher education collaboration in general (with countries such as Indonesia and Vietnam) can help pave the way for better understanding and improved political and economic relations. Moreover, the US receives large groups of students not only from India, but also from China, South Korea and Taiwan, without having specific national policies in place to increase student recruitment from these nations. (Students from these countries may be keen to study for a US degree due to the high status of a US degree at home.) The US has recently also begun to pay more attention to international student recruitment at the national level.

Canada receives large groups of students from China, India and South Korea and targets nine of the ten Neso countries (all except Russia, which is not targeted as a priority country). Canada's list of target recruitment countries and regions covers many other areas in the world as well, including the US, Japan, Germany, France, the Gulf region, North Africa and the Caribbean. This wide focus may be related to the fact that Canada is lagging behind the US, Australia, the UK and Germany, since the country has only recently begun its national effort to recruit international students. In Canada, international student recruitment is seen as a welcome form of highly skilled immigration.

Australia, Singapore, Malaysia and China, which are among the main international student recruiting countries in the East-Asian region, wish to become – or strengthen their current position as – international student hubs for the region. This explains their selection of priority countries, which include China, Malaysia, Indonesia, Vietnam, Thailand, South Korea and India. These countries are located close by and most have large and young populations that are keen to enter higher education and have the financial means to do so. These seven Dutch priority countries are thus actively targeted as priority recruitment countries by several other nations in the region as well. In addition to these Nuffic Neso countries, Taiwan is a priority country for Malaysia, and Russia is a priority country for China and Malaysia.

In Australia, an important rationale for international student recruitment is the fact that many of its higher education institutions are partly dependent on international student fee income. Australia is highly experienced in recruitment from the Asian markets and is an attractive study destination for those Asians keen to enter a Western-style higher education programme without having to travel to North America or Europe for that purpose. Nevertheless, Australia's recruitment focus is wider than Asia – of the four postgraduate scholarship programmes offered by the Australian government, one targets students from Asia, one targets students from Europe, and two are open to applicants from all countries.

Interestingly, the Malaysian government appears to have identified three groups of target recruitment countries, in declining order of importance. Based on the locations of its education promotion centres, the first group of target countries comprises China, Indonesia and the United Arab Emirates (UAE). For Malaysia, China and Indonesia are the largest student markets in the region, and both countries share language similarities with Malaysia's main population groups. Malaysia's second group of target countries comprises South Korea, Taiwan, Thailand and Vietnam, all of which are neighbouring countries with growing middle classes, growing economies and an increasing demand for higher education places. Malaysia's third group of target countries includes Russia, Australia, the wider Middle East and Africa. In Islamic nations, Malaysia promotes itself as a good-quality study destination with socio-cultural and religious similarities to its targets. In Africa, Malaysia promotes itself as a former developing nation that understands the human capacity development and training needs of developing countries. The Malaysian government is thus cleverly using its national common identity as a strategy for higher education promotion and international student recruitment.

The Chinese Ministry of Education states that China "is taking major countries as the focal point, neighbouring countries as of primary importance, and developing countries as the basis". Although the ministry has not specified this strategy, it can be assumed that the major countries include the US, Russia and India, that neighbouring countries include the ASEAN member countries, and that developing countries include many nations in Africa and some in Latin America. In practice, China targets a very wide range of countries, perhaps in line with its growing position as a global economic power.

The above analysis shows that the Dutch target countries for international student recruitment are priority markets for many other nations too, which is explained by the fact that these target countries are mostly growing economies and tend to have large and young populations with a growing demand for higher education places. There are some differences in priority markets and in rationales for selecting these markets, depending for instance on the geographical region, socio-cultural similarities which make recruitment easier, or on political considerations.

Overall, the influence of colonial links continues but is decreasing. Former colonisers, such as France, the UK and the Netherlands, still receive relatively many students from their former colonies due to similarities in language and/or higher education structures and the availability of scholarship schemes for students from these nations. However, countries with large populations, a shortage of good-quality domestic higher education places, high economic growth figures and increased global political power (such as India, China and Indonesia) are becoming more important target countries for recruitment. It is also important to note that recruitment strategies do not only target "developing" countries: several of the nations researched in this chapter actively try to increase recruitment from "developed" countries, such as the US, Japan, Germany and France.

### 2.12.3 Recruitment focus on level or fields

The countries researched in this study place a strong emphasis on recruitment at the master's and doctoral levels. This is done to strengthen the domestic knowledge economy and society. Dutch government documents state that the recruitment focus should be on "highly talented" students, but do not include a specific focus on master's and doctoral recruitment. This focus on recruiting "highly talented" postgraduate students is emphasised in government policy documents in nearly all countries, and supported by scholarship programmes. Most scholarship programmes in the Netherlands, Germany, Switzerland, the UK, the US, Canada and Australia are for master's and doctoral students only. There are some exceptions, for instance in the US, where some US scholarship programmes are also available to "outstanding" undergraduates. Germany, the US and Australia, in particular, appear to offer a comparatively wide range of national government scholarships for postgraduates.

The French focus on postgraduate recruitment is also clear from a 2009 initiative to organise promotion tours of French doctoral schools in China, which was complemented by the launch of a French scholarship programme for Chinese PhD students in France. Some countries target students from a specific country to specific kinds of programmes. France, for instance, pays special attention to recruiting Indian students to long-term (rather than short-term) degree programmes.

Switzerland, Germany and Malaysia have formulated strategies to recruit international students to certain subject areas in particular. Switzerland strongly emphasises the recruitment of master's and doctoral students to programmes in science, technology, engineering, mathematics and hospitality, since the country's lack of domestic students in these areas potentially leads to labour market shortages (as in several other countries, including the Netherlands, Germany and the UK). For the same reason, Germany is making it easier for foreigners to find employment in Germany in the fields of science, technology, engineering and mathematics. The Netherlands also faces student shortages in these areas, but has not developed national-level policy measures to encourage recruitment to these fields in particular.

The Malaysian Ministry of Higher Education has identified four core areas for international student recruitment: Islamic banking and finance, advanced engineering, hospitality and health sciences. This focus is thought to help strengthen and develop Malaysia's economy and regional position as an international higher education hub.

The above examples show that international student recruitment strategies in several countries have been aligned with national economic strategies – with the main strategies focusing on increasing a country's international economic competitiveness by investing in knowledge, innovation and a highly-skilled workforce. In more and more countries, recruitment strategies are also shifting from quantity to quality, with governments trying to recruit talented students at the master's and doctoral levels in particular, rather than aiming to attract as many students as possible. This is also due to the wish of many governments to strengthen the country's international economic competitiveness, and sometimes (in the case of small countries such as the Netherlands and Switzerland) to their relatively limited higher education capacity.

### 2.12.4 From traditional to more advanced recruitment strategies

The country analyses in this chapter suggest that national governments (as well as higher education institutions) in most countries do not merely try to recruit international students through traditional means such as promotion at international student fairs and bilateral agreements for student exchange. Instead, several countries have developed more advanced or even highly sophisticated strategies – sometimes at the national level, sometimes at the institutional level backed by national government funding. Examples of such advanced strategies are the following:

- Offering foundation programmes in target recruitment countries to academically prepare international students for degree programmes in the recruiting country (such programmes have been developed by UK higher education institutions, for instance). It should be noted though that offering foundation programmes is a method to attract relatively weak students at bachelor's level, rather than "highly talented" students at master's and PhD levels.

- Offering full degree programmes at foreign institutions or international branch campuses abroad. Note that these initiatives have usually been launched at the institutional rather than the national level. Examples are found in many countries, including for instance the UK, France, Australia, the US, Canada and Malaysia.

- Offering home-foreign double and joint degree programmes abroad. On the one hand, these programmes help attract international students and enhance student exchange. On the other, joint degree programmes in particular can form a basis for developing long-term strategic HE and research collaboration (since the development of such programmes requires a "deep" form of cooperation, as existing programmes have to be reworked and joint exam requirements need to be set). Singapore's use of collaborative degree programmes with "top-class" universities from abroad, for instance, is a policy instrument to attract more (international)

students. Germany has established “centres of excellence” abroad, specifically aimed at student and staff exchange and joint degree programme development. Again, most of these initiatives have been initiated at the institutional rather than the national level, but they are often supported (i.e. made legally possible) by national legislation.

- Governments in several countries that were analysed have formulated strategies aimed at developing the country into an international higher education hub. In Singapore and Malaysia, governments have been and are still working hard to develop such hubs within South-East Asia by attracting top-quality foreign universities / university programmes and constructing physical hubs where domestic and foreign higher education institutions are located along with companies, in order to stimulate international collaboration and local economic growth and innovation. In different ways, several other governments aim to become international higher education hubs as well. The Swiss government, for instance, has formulated a strategy to turn the country into one of Europe’s premier higher education locations by 2015. The Chinese government, too, aims to make China Asia’s top destination country for international students by 2020.

- In several countries, international student recruitment is becoming increasingly interlinked with research activities and broader bilateral education partnerships (such as domestic-foreign double and joint degree programmes). This latter approach has at least two potential advantages: it may help attract international students at the higher degree levels (master’s and doctorate), and it may be a more sustainable method to guarantee international recruitment in the longer term, since it will help to secure the inbound flow of international students, given that inbound mobility is a fixed part of the collaborative degree curriculum.

- Offering degree programmes in a foreign language other than English. This is done on a modest scale by higher education institutions in, for example, Germany and the Netherlands.

Of the countries researched in this study, the UK, Switzerland, Germany, Australia and Singapore appear to have developed the most advanced international student recruitment strategies. Governments in these countries combine many of the advanced strategies mentioned above with traditional recruitment strategies.

### 2.12.5 Coherence of policy strategies

Interestingly, in Germany, Switzerland and Singapore international student recruitment is closely interlinked with national economic and research agendas. In Germany and Singapore, the national economic and research agendas drive international student recruitment. Swiss policy strategies link international student recruitment closely to the bilateral research collaborations of Swiss higher education institutions. Swiss institutions have been assigned research strengths to help them develop into specialist centres in specific areas. This enables the marketing of Swiss higher education institutions abroad, based on a clear institutional and research profile. Switzerland and Singapore have also created a high-quality research infrastructure, which is attractive to talented students and researchers. This strategy of closely linking international student recruitment and national economic and research strategies into one coherent strategy is effective in attracting “highly talented” international students at the master’s and doctoral levels.

Furthermore, the German government in particular has sustained a very consistent international higher education cooperation policy, focused on “academic excellence”, of which international student mobility is a part. This consistent and focused policy has contributed to Germany’s strong position in the global market for international students.

### 2.12.6 Balancing incoming and outgoing mobility

Although this study did not research it in depth, it is interesting to note that some countries appear to strive for a balance between incoming and outgoing mobility. This appears to be the case in Germany and China in particular. In the US, NAFSA is promoting study abroad by US students, although there is no national policy on (balancing) international student mobility. In the Netherlands, the issue of the need to balance incoming and outgoing mobility

has been raised in the past year, due to the fact that the current imbalance between the Netherlands and Germany (with far more German students coming to the Netherlands than vice versa) has led to a corresponding financial imbalance in higher education costs for the Dutch government. Similar developments can be seen in other European countries, such as Belgium and Austria. In general, many countries appear to emphasise international student exchange in addition to recruitment. This is clear from the number of bilateral or regional exchange programmes that have been signed in recent years, and from the increase in the number of international double and joint degree programmes.

## Policy instruments influencing international recruitment

This chapter shows that national governments have developed a range of policy instruments to recruit more international students (of the desired kinds). It should be noted that within the European Union, national government policies on international student mobility are also influenced by EU-level policies. At the EU-level too, instruments have been developed to increase the appeal of the EU as study destination, to encourage international student mobility within the EU, and to stimulate international higher education cooperation more broadly. Two of the main EU policy instruments are the following:

- The Erasmus Mundus funding and scholarship scheme for setting up joint international master's and PhD programmes; and
- The development of long-term strategic collaboration with third countries (including Australia, Brazil, Canada, China, India, Japan, Mexico, New Zealand, South Korea, and the US). These collaborations include elements of international student exchange and moves towards mutual recognition of degrees.

Within this broader EU scheme, some countries are collaborating in the recruitment of non-EU students. Nuffic, DAAD and CampusFrance, for instance, often work together in recruiting students from Latin America.

This chapter also shows that national governments have adopted different mixes of policy instruments. This section will examine how the countries studied in this chapter compare with respect to the following policy instruments: tuition fees and scholarships, student visa and employment regulations, programmes taught in other languages, promotion instruments and recruitment regulations.

### 2.12.7 Tuition fees & scholarships

This study shows that Dutch tuition fees for non-EU/EEA students are high compared with the fees charged in the other countries featured in this study (with the exception of the UK). At the moment, the offer of Dutch government scholarships for international students is limited to a few small scholarship schemes that are part of bilateral exchange agreements with other countries.

UK tuition fees for non-EU/EEA students are similar to those charged in the Netherlands, and from 2012, UK home/EU/EEA fees at some higher education institutions may be increased to £ 9,000, which is very high compared with other countries. In the UK, national-level and competition-based scholarships are available, but only to a limited extent and have been reduced in recent years.

French tuition fees are low at public higher education institutions, while most German states do not charge tuition fees at all (and those that do charge low fees). In Germany, non-existent or low fees are combined with a wide offer of scholarship schemes for international students. Swiss fees for international students are approximately six times as low as the Dutch fees. In Canada, tuition fees vary between provinces and degree programmes, but overall, fees are low compared with the Netherlands, the US, the UK and Australia. Compared with the Netherlands, Canada has a good scholarship offer for international students.

The US has no national tuition fees policy, and fees vary substantially between states. At the national level, the US has a wide range of scholarships available for international students. International student fees in China also vary between institutions and programmes, and the number of Chinese scholarships for international students

is increasing. In Singapore, international student tuition fees are lower than those charged in the UK, Canada, Australia and the US. Singaporean fees are lower than Dutch master's fees, but comparable to Dutch bachelor's fees. Singapore also offers scholarships to international students.

### 2.12.8 Student visa and employment regulations

This study shows that Dutch student visas are very expensive compared with the rates in Germany, France, Switzerland, the US and Canada, and also more expensive than the rate charged (for postal applications) in the UK. Most countries ask for the same kinds of proof in visa applications. These include proof of registration at an officially recognised higher education institution in the destination country, proof of financial resources to cover tuition fees and living expenses (often for one year, but in Switzerland for the full duration of the study programme), and sometimes proof of health insurance cover. In the UK, from April 2012 student visa applicants will also need to provide evidence of English-language proficiency, upper-degree level students may only remain in the UK for up to five years, and only postgraduate students at universities and government-sponsored students can bring their dependants.

Work opportunities during study for visa-holding students are comparatively limited in the Netherlands, with ten hours a week during term time and 40 hours a week during holidays, and only on the basis of a separate work permit. With the exception of China and Singapore, where international students are not allowed to undertake paid work (outside of workplace internships) at all during their studies, the other countries studied generally allow visa-holding students to work more hours during term-time. An overview is given in Table 2.

Two of the countries studied in this report offer a post-study work search year for international students that have graduated at an institution in their country. Such automatic job-search periods opportunities are offered by the Netherlands and Germany. In other countries, international students can apply for a general (temporary) post-study work visa or for a visa that allows employment in certain occupations only. See Table 2 for an overview.

*Table 2: Employment regulations for visa-holders, during and after study, per study destination*

| | Work during study | Post-graduation employment |
|---|---|---|
| **The Netherlands** | Up to ten hours a week during term time & 40 hours a week during holidays | There is a one-year job search year, whereby international graduates can be allowed to remain working in the Netherlands if they find a job with a minimum salary within the job search year.<br><br>There is a separate admission scheme for "highly educated persons" who obtained their master's or doctorate at an institution featuring in the top 150 of the THE/Shanghai Jiaotong Indexes. |
| **France** | Up to 964 hours a year<br><br>(this corresponds to nearly nineteen hours a week) | On completion of a master's programme in France, international students can apply for a 6-month residence permit which allows them to undertake paid work for eighteen hours a week on average.<br><br>A separate skills and talents permit for international graduates in government-specified areas. |
| **Germany** | Up to fourteen hours a week – but not for students on pre-university programmes | Germany offers a post-study work-search year, during which a student may work for up to fourteen hours a week, if (s)he can proof to have sufficient financial means to pay the living expenses for that year. |

| | Work during study | Post-graduation employment |
|---|---|---|
| **Switzerland** | Up to fifteen hours a week during term-time and holidays – but only for full-time students that show regular study progress and have resided in Switzerland for at least six months | There is no automatic job-search year for all international graduates from Swiss institutions.<br><br>Only a very limited number of highly qualified scientists with a degree obtained in Switzerland and working in sectors with a lack of potential labour are issued a work permit. |
| **UK** | Up to 20 hours a week during term-time & 40 hours a week during holidays – but only for students at universities and publicly funded further education colleges | Post-study work opportunities will be limited from April 2012. Non-EU/EEA graduates from UK institutions will no longer be allowed an automatic two-year job search period after graduation, but they will need to find employment sponsorship or a job offer with a minimum salary. |
| **US** | No. of hours varies depending on type of student visa.<br><br>A J-1 student visa allows study-related work during term-time, but only if approved by the higher education institution where the student is enrolled.<br><br>An F-1 student visa allows students to apply for a work visa to undertake employment related to the student's field of study for up to 20 hours a week, but to obtain this work visa, students must have been enrolled in US higher education for at least one year. | International students that graduated in the US can apply for a temporary post-study work visa for up to three years. This visa allows temporary work in selected occupations only, including science, engineering and computer programming. |
| **Canada** | Up to 20 hours a week of on-campus employment on a study permit, or<br>up to 20 hours a week of off-campus employment on a separate work permit | International students can apply for a post-study work visa only after having studied in Canada for at least eight months. |
| **Australia** | Up to 20 hours a week during term-time and holidays – no separate work permit is required | Post-study work opportunities are possible on a "skilled graduate visa", which allows graduates to live and work in Australia for up to eighteen months after graduation in the country.<br><br>Another possibility is the so-called "permanent skilled visa", which allows graduates to work in certain government-specified occupations only. Alternatively, graduates should find an employer to sponsor them on a "business (long stay) visa". |
| **Singapore** | International students are not allowed to undertake paid work (outside of workplace internships) during study. | Post-study employment for international students is only possible on a separate "training employment permit". |
| **Malaysia** | Up to 20 hours a week during term-time | It appears that international students, after graduating in Malaysia, can apply for a work permit but that graduates, after graduation in Malaysia, are not automatically allowed to stay in the country to look for work. |
| **China** | Student visas do not allow international students to undertake paid employment during their studies. Only in exceptional cases can students successfully apply for a work visa. | Unclear. |

### 2.12.9 Programmes taught in other languages

Apart from the countries where English is the / an official language of instruction (the UK, the US, Canada, Australia, Singapore and Malaysia), all other five countries researched in this chapter have developed English-taught or degree programmes to attract international students:

- With approximately 850 English-taught master's programmes and nearly 250 English-taught bachelor's programmes, the Netherlands offers an extensive range of English-taught degree programmes, compared with other non-English speaking nations. A small number of Dutch institutions offer a few German-taught degree programmes, specifically targeted at German students.
- In France, which is much larger and has more higher education institutions than the Netherlands, approximately 480 degree programmes are completely taught in English and approximately 120 are partly taught in English.
- In Switzerland, a high proportion of degree programmes are available in English (in addition to the country's official languages German, French and Italian). At some Swiss institutions, approximately 80% of master's programmes are available in English.
- In Germany, over 900 bachelor's, master's and doctoral programmes are either fully taught in English, or they include only a few modules in German and the rest in English. A few higher education institutions offer programmes in other languages, including Chinese, French, Italian, Russian and Spanish, while German language courses are offered parallel to, or integrated into these programmes.
- In China, some English-taught courses are offered at universities that have been selected by the government as being suitable to attract international students.

Interestingly, in addition to the implementation of these degree programmes taught in foreign languages, Germany and China also make explicit efforts to increase the learning of their native languages abroad. The German government is expanding opportunities abroad for students to learn German as a foreign language, while the Chinese government is making a great effort to stimulate Chinese-language learning at Chinese institutions and at Confucius institutes, which are already located in nearly 80 countries and regions. These measures to increase native language learning can become an important instrument to encourage study in Germany / China.

### 2.12.10 Promotion instruments

Several of the countries researched in this chapter have established agencies abroad to promote higher education opportunities at home and recruit international students. These include the US (with over 400 offices in 134 countries), the UK (200 offices in 110 countries), France (128 offices and 27 annexes in 97 countries), Germany (offices in 52 countries), the Netherlands (promotion offices in ten countries), and Malaysia (four offices in three countries). Canada and Singapore appear not to have set up any promotion agencies abroad.

Instead of (or in addition to) creating direct promotion / recruitment agencies abroad, several countries have set up different kinds of offices abroad that have different aims but that may still encourage or support recruitment efforts. Examples are the following:

- Instead of direct student recruitment agencies, the Swiss government has established science and technology councils in seventeen countries and four centres for science, technology and innovation (two in the US, and one each in Singapore and China). These centres promote Switzerland as a prime location for world-class science and technology. This Swiss structure of councils and centres is in line with Switzerland's focus on research collaboration, of which international student and researcher recruitment is an integrated part.
- In addition to the foreign DAAD offices, Germany has set up four centres of excellence in 2009, in Russia, Colombia, Chile and Thailand. These offices are aimed at encouraging and supporting German and foreign institutions to develop joint degree programmes and organise student and staff exchanges.
- Australia has positioned education counsellors at Australian embassies abroad to help build strong education partnerships internationally. These counsellors are located in China, Europe, India, Indonesia, Japan, South Korea, Malaysia, North America, Taiwan, Thailand and Vietnam, and serve indirectly as a vehicle for promoting international student recruitment to Australia.
- China – as mentioned earlier – has set up over 300 Confucius institutes and Chinese language learning schools in nearly 80 countries and regions. These encourage the learning of Mandarin and Chinese culture and, as such, constitute a vehicle for future study in China.

Germany, the UK and Singapore in particular have good levels of government funding available for projects that promote their higher education programmes abroad or that encourage or support international student recruitment or exchange (scholarship funding has already been mentioned above). The German DAAD, for instance, has allocated generous financial assistance to enable selected German universities to develop transnational education initiatives (such as dual and joint degree programmes, or German-foreign branch faculties) abroad. The British government also allocates targeted funding for establishing international student recruitment and higher education partnership schemes with specific countries or regions, such as India. Such schemes help to attract more foreign students to the UK. The Singaporean government provides financial support to Singapore-based branch campuses of foreign "world-class universities".

Furthermore, France, Germany, the UK, the US, Australia (and to a lesser extent, Canada), all have a very large international alumni base. These international alumni are an important instrument to promote higher education studies in these countries.

## Recruitment regulations

In the Netherlands, a Code of Conduct on international students in Dutch higher education was implemented to guarantee the quality of higher education that is offered to international students. Only those institutions that have signed the Code may recruit international students and use the services offered by the Nuffic Neso offices (i.e. the Dutch higher education promotion offices abroad).

In several countries, such as the UK and Australia, individual higher education institutions use recruitment agents in target recruitment countries. Students throughout the world are increasingly using agents as well to help them find a suitable place to study abroad. In the UK, the British Council does not accredit or formally recognise any agents, but the organisation does provide several services to assist agents working with UK institutions, to increase the quality of an agent's work. These services include an online course for agents working for the British Council, a guide to good practice for agents, designed by the British Council, Education UK Websites and publications that give agents access to information on local news in their local language, opportunities for agents to participate in Education UK networking events, and informational visits of agents to the UK.

In Australia, all international education providers are legally required to register under tight regulatory criteria (e.g. having to demonstrate that their education is of a satisfactory standard). All international education providers in Australia are also required to publish a list of recruitment agents operating on their behalf, and to ensure greater transparency. Furthermore, separate tertiary and vocational quality and standard agencies will have jurisdiction over registered higher and vocational education providers in relation to international students.

The above examples show that governments have adopted different methods to assure international students of the quality of their higher education programmes.

So far, this report looked at those countries that are among the most active in international student recruitment. The next chapter looks at the policy context and national student mobility policies in fourteen important "source countries" of international students, many of which are key target countries for international student recruitment.

# Chapter 3: National student mobility policies in target recruitment countries

National policies on incoming and/or outgoing student mobility and contextual factors in key recruitment countries also influence global mobility directions. This chapter describes national-level student mobility policies and relevant contextual factors in recruitment countries that are (or may become) important to the Netherlands. The focus is on the ten priority recruitment countries identified by the Dutch government: Brazil, China, India, Indonesia, Mexico, Russia, South Korea, Taiwan, Thailand and Vietnam. Argentina, Chile, Colombia and Egypt will also be analysed, since these countries are interesting potential recruitment markets for Dutch higher education institutions in the future.

## 3.1 Brazil

### 3.1.1 Introduction

In 2008, there were around 23,000 Brazilian students studying abroad, which is only a small percentage of the total Brazilian student population. The most popular study destinations are the US, France, Portugal, Germany, Spain and the UK. In the past four years, the number of Brazilian students in the Netherlands increased from around 150 in 2005-06 to nearly 300 in 2010/11. Note that these statistics do not include Brazilian students who also have a European nationality.

### 3.1.2 National policies to encourage outgoing student mobility

The Brazilian government actively promotes study abroad among Brazilian students, mainly by providing scholarships which allow students to attend a short course or conduct research abroad. The Brazilian government is currently reviewing a project that aims to increase the number of Brazilian students studying abroad for up to two semesters by giving them dedicated scholarships.

In 2009, The Federal Agency for Support and Evaluation of Graduate Education (CAPES) granted study abroad scholarships to 4,344 Brazilian students. That same year, the National Council for Scientific and Technological Development allocated close to 500 scholarships for doctoral and postdoctoral students to study abroad. In April 2011, Brazilian President Dilma Rousseff announced that the Brazilian government – in cooperation with the private sector – will make 75,000 study abroad scholarships available between now and 2014. The main focus of these scholarships will be on the sciences and engineering, since Brazil lags behind many other countries in these areas and in innovation. Given the prospect of so many Brazilian students studying abroad, procedures to validate and recognise foreign diplomas will be improved.

The government also encourages high school students to learn a foreign language. Since 2010, English or Spanish is tested in the entrance exam for Brazilian higher education. As this is expected to improve the English proficiency of Brazilian students, it will also increase their potential to study abroad.

Brazilian higher education institutions are increasingly keen on finding opportunities for institutional cooperation with foreign institutions. These partnerships can facilitate both outgoing and incoming student and staff mobility and/or research cooperation. Note that cooperation agreements are also signed with higher education institutions in other rapidly developing countries, such as China.

### 3.1.3 National policies to recruit international students

Brazil has set up two universities that are to become regional education hubs. Hence, these universities aim to attract international students from neighbouring (Latin-American) and African countries. Scholarships are available to enable international students to study at these institutions. There are also indications that Brazil's best universities (such as the University of São Paulo) are increasingly successful in attracting more international

students. The overall intake of international students, as compared with the domestic student population, remains nonetheless very small.

Although the policy is yet to be set, the Brazilian strategy will likely focus on attracting Brazilian students and scholars back to Brazil. A national policy could also focus on attracting foreign scientists to live and work in Brazil.

### 3.1.4 Factors influencing outgoing student mobility

Brazil has a large population, of which an increasing number are of college-going age. This, in combination with the economic prosperity and growing labour market opportunities, makes Brazil an attractive country for international student recruitment. The main factors that encourage Brazilian students to study abroad are the following:

- The unavailability of and difficult access to high quality higher education programmes in Brazil;
- Brazil's cultural, economic, educational, linguistic, historical, political and religious ties to other regions and countries;
- Brazil's young population and increasing wealth, which allow more Brazilian students to study abroad;
- Many financial incentives (i.e. scholarships) to study abroad made available / possible by the Brazilian government; and
- The abundance of information on potential destination countries, given that many of those countries target Brazil as a priority recruitment country.

Other factors however may increase the willingness of Brazilian students to study at home. Improved access to the domestic higher education sector is one of them. Improved access will be achieved by increased investment and expenditure on primary, secondary and higher education by the Brazilian government and the private sector (the oil company Petrobas, among others). [78] Investment in primary and secondary education is important: there are indications that many university seats are not filled because applicants are not sufficiently qualified. [79]

## 3.2 China

### 3.2.1 Introduction

As explained in section 2.11, China has stepped up its efforts to attract international students to its higher education system. There are nonetheless still more Chinese students studying abroad then there are international students in China. UNESCO data from 2008 indicate that more than 441,200 Chinese were studying abroad in that year. Around 25% of international mobile Chinese students went to the US for higher education. Other popular study destinations are Japan, Australia, the UK, and Germany. In 2010/11, 5,400 Chinese students studied in the Netherlands.[80] Compared with 2007/08, this is an increase of more than 30%.

### 3.2.2 National policies to encourage outgoing student mobility

In the last two decades, the Chinese government has increasingly made studying abroad easier for its citizens, for example by introducing a simplified procedure for obtaining a Chinese passport and by giving more freedom in the exchange and transfer of Chinese and foreign currencies. The government has also actively promoted studying abroad, as indicated by the availability of government-sponsored financial support schemes. These scholarships are administered by the China Scholarship Council (CSC), which annually sponsors around 7,000 Chinese students. Besides the scholarships administered by the CSC, there are also university and company funded scholarships, which are in place mainly to support employees in studying abroad. Note however that the vast

78) Hennigan, T. (2010). 'BRAZIL: Oil giant investing millions in universities', *University World News*, 20 March. URL: http://www.universityworldnews.com/article.php?story=20110318130151658.
79) McKenzie, A.D. (2010). 'BRAZIL: Too few students to fill university seats', *University World News*, 19 September. URL: http://www.universityworldnews.com/article.php?story=20100918074520617.
80) Nuffic (2011), op.cit.

majority of Chinese students that study abroad are self-financed. Hence, it can be concluded that government-funded scholarships play a limited role in the mobility of Chinese students.

With respect to the future, the Chinese government is also paying more attention to student mobility to and from other Asian countries. This is underscored by China's aim to receive 100,000 exchange students from ASEAN countries, and to send 100,000 exchange students to ASEAN nations, by 2020.

The Chinese government actively stimulates Chinese overseas students to return home after their studies abroad by investing heavily in the academic infrastructure, by offering returning students preferential tax schemes, and also by making returning home part of the conditions to receive a government sponsored scholarship.

As part the national strategy to encourage outgoing student mobility, the Chinese government also places a strong focus on creating education links with other countries. This has resulted in national-level education agreements between China and many other countries, such as the mutual recognition of bachelor's, master's and PhD degree treaties that China has with 34 countries including the UK, Germany, France, Portugal, Australia, New Zealand and the Netherlands. The global links of Chinese higher education are also reflected in the increased number of institutional partnerships between Chinese higher education institutions and their foreign counterparts. Note that such agreements are not only signed with Western countries, but also with Asian and Latin American countries. The Chinese government also has a strong partnership with Australia.

In the Outline of China's National Plan for Medium and Long-term Education Reform and Development (2010–2020), the Chinese government announced that it will continue not only to stimulate Chinese students to study abroad, but also to encourage international students to study in China.[81] Another important aspect of the reform and development plan is the strengthening of cooperation in higher education between China / Chinese institutions and foreign countries / institutions.

### 3.2.3 National policies to recruit international students

China's policies to recruit international students are described in section 2.11.

### 3.2.4 Factors influencing outgoing student mobility

The main factors that encourage Chinese students to study abroad are the following:

- Although improving, the lack of and difficult access to high-quality higher education institutions and programmes in China can be a reason to study abroad.
- In general, non-top Chinese higher education institutions are perceived to provide degrees that are of low quality and reputation. Degrees earned abroad are recognised, accepted and valued by Chinese employers and higher education institutions.
- China has cultural, economic, educational, linguistic, historical, political, and religious ties to other regions and countries.
- The increasing wealth of Chinese families enables more Chinese students to study abroad. China's one-child policy and the opportunity to gain a competitive advantage over other students make Chinese families more willing to fund studies abroad by their children. Furthermore, the political climate within China can be a push factor.
- Most, if not all, countries target China as a country to recruit from. The means that information about potential hosting regions, countries, and institutions is widely available.
- The Chinese government offers financial incentives (i.e. scholarships).

Current Chinese investments in the domestic higher education system may reduce outgoing student mobility in the long term. Noteworthy in this respect are the government's "211" and "985" projects, which aim to make a selected number of Chinese universities among the best in the world. If these projects succeed, chances are that fewer Chinese students are drawn to studying abroad.

81) Chinese government (2010). Outline of China's National Plan for Medium and Long-term Education Reform and Development (2010-2020). Beijing: Chinese government. URL: http://www.aei.gov.au/AEI/China_Education_Reform_pdf.pdf.

## 3.3 India

### 3.3.1 Introduction

With more than 170,300 students studying abroad, India is the world's second-largest supplier of international students (after China). However, the percentage of Indians studying abroad is still small, and amounted to no more than 1% of the total Indian student population in 2008. The most popular foreign destinations of Indian students in 2008 were the US, Australia, the UK, Germany and New Zealand. The number of Indian students in the Netherlands has more than doubled since 2005, to around 750 in 2010/11.

### 3.3.2 National policies to encourage outgoing student mobility

In anticipation of 21st century developments, India is moving towards a more knowledge intensive economy. Education policies can also be seen in this perspective. India's National Knowledge Commission (NKC) has advised the government to focus on capacity and quality building in the field of education. The NKC recommends enhancing the following five key aspects: access to education, curriculum development, international compatibility of curricula, a skills-oriented structure and innovative research.

Hence, the Indian government plans to strengthen its higher education sector, in part by increasing investments in higher education and by establishing new higher education institutions. The Foreign Universities Bill, which is yet to be approved by the Indian Parliament, can also be seen in the light of capacity building in India. The bill aims to encourage high-quality foreign higher education institutions to offer their educational services in India. The rationale is, *inter alia*, that this will provide alternatives to Indian students who would otherwise have gone abroad. If this bill is made into law, it remains to be seen whether it will actually lead to a decline in the number of Indian students studying abroad.

One of the current policies to encourage outgoing student mobility is the Educational Exchange Programme (EEP). This programme, established on the basis of agreements between India and several other countries, aims to increase the focus on cooperation and sharing best practices in the field of education for mutual benefit. The programme includes scholarships that allow Indian students to study abroad in the participating countries at the postgraduate, PhD or postdoctoral levels. These scholarships are mainly funded by the participating countries.

India is in the process of signing mutual recognition agreements with other countries. As a result, Indian degrees will be recognised abroad and foreign degrees recognised in India. The agreements will encourage more Indian students to study abroad with their Indian qualifications and, once they have returned to India, to find work or further education on basis of their foreign diplomas.

### 3.3.3 National policies to recruit international students

In 2007/08, there were over 21,000 international students studying in India. This is a 60% increase compared with 2004/05. Most international students in India come from other Asian countries. The Indian government aims to attract more international students by changing the admissions process, improving the education infrastructure and increasing the emphasis on academic support. In addition to these policies, universities have been asked to provide or strengthen existing English proficiency classes for international students.

Scholarships offered by the Indian government to international students are scarce. In fact, the only scholarship funded by the Indian government for international students seems to be the Research Fellowships (JRFs) for Foreign Nationals, which enables international students to undertake postgraduate studies / research at Indian universities in the areas of science, the humanities and the social sciences. Fellowships are awarded to students and teachers from developing countries in Asia, Africa and Latin America.

### 3.3.4 Factors influencing outgoing student mobility

Half of the Indian population is younger than 25. This, in combination with a growing knowledge-based economy, is likely to lead to an unprecedented increase in the demand for higher education. Given that the domestic availability of higher education does not match this demand, increasing numbers of Indian students have already opted to study abroad. This trend is likely to continue in the coming years. For Indian students, the following factors appear to be the most important in encouraging them to study abroad:

- Although there are several top-class institutions in India, in general there is a shortage of high-quality higher education programmes and cutting-edge research and research facilities. Access to the top-quality programmes can also be an issue.
- As a result, the reputation of Indian higher education and research in general is poor.
- India has cultural, economic, educational, linguistic, historical, political and religious ties to other regions and countries, which may encourage students to study in these destinations.
- India has an increasing population wanting to move on to tertiary education, and domestic economic growth allows many of them to do so abroad.
- Due to the country's large young population and its current shortage of higher education capacity, India is considered an attractive country to attract students from. Because of this, there is extensive information available on potential hosting regions, countries and institutions.

The main factor discouraging Indian students to study abroad is the growing availability of higher education in India itself. This is reflected in the efforts of the Indian government to focus on building domestic higher education capacity and its interest in retaining Indian students in India. Moreover, one of the rationales of the government's efforts to retain Indian students is to have part of the money (approximately US$ 4 billion) that Indian students are currently spending on their studies abroad, invested in higher education in India itself. Another blocking factor, made apparent by the recent incidents with Indian students in Australia, is that Indian students and their parents are sensitive to safety issues within the foreign country, city and institution.

## 3.4 Indonesia

### 3.4.1 Introduction

In 2008, over 30,300 Indonesian students studied abroad, which is a very small part (0.7%) of the total Indonesian student population. Popular study destinations are Australia, the US, Malaysia, Singapore, Germany, Japan and the UK. Between 2005/06 and 2010/11, the number of Indonesians studying in the Netherlands remained more or less stable at around 1,200 students annually.

### 3.4.2 National policies to encourage outgoing student mobility

The Indonesian government has implemented policies to support higher education institutions in their internationalisation efforts and to give students opportunities to experience an international education. To do the former, the Indonesian government encourages higher education institutions as well as primary and secondary schools to adopt a more international curriculum and international standards. It will probably take some time, however, before primary and secondary schools are ready to fully adopt new international standards. Yet, it is essential to understand that international components in the curriculum would make it easier for Indonesian students to study abroad. A way to ensure and test the international standard is to have the institutions or study programmes accredited by international professional bodies. However, so far only national "plus" schools and international schools have had their international study programmes accredited to international standards, such as the International Baccalaureate (IB) or Cambridge GCE A Level or O Level. Students graduating from these schools in particular are better prepared for studying abroad.

Besides these government policies, higher education institutions themselves are also more aware of the need to internationalise. This, among other things, is clear from their willingness to enter into international partnerships. They regard international cooperation as an opportunity to improve their standards of education and their international credibility. In addition, institutions consider it necessary to keep pace with global developments in higher education. Furthermore, the Indonesian government has financially supported partnership initiatives between Indonesian and foreign higher education institutions for several years. Examples of such initiatives are government scholarship schemes and educational cooperation resulting in international double degree and twinning programmes.

The Indonesian government also actively offers Indonesian students and academics the opportunity to study and/or undertake research abroad. A prime example of this are the DIKTI scholarships, which are available for lecturers, PhDs, postdocs and visiting scholars who are planning to study and/or conduct research abroad. Another example is the Unggulan talent / merit-based scholarship programme, which is designated for Indonesian students enrolled in double degree programmes with foreign higher education institutions.

The policies and developments mentioned above should be seen in the light of the Strategic Plan for 2010–2014 of the Ministry of National Education / Directorate General of Higher Education (DIKTI). Another important component of the strategic plan is to increase the number of high-quality higher education institutions and, along with this, to improve the availability, accessibility and affordability of high-quality higher education.

### 3.4.3 National policies to recruit international students

The Indonesian government has not developed a national policy for international student recruitment. Nonetheless, Indonesia has a policy in place which dictates that Indonesian universities that have international students enrolled cannot allocate more than 10% of the available seats in educational programmes to international students. Despite this policy, individual Indonesian higher education institutions are setting up international study programmes, mainly to attract international students to Indonesia. A first indication of this is that Indonesian higher education institutions are mainly recruiting Malaysian students to these programmes. In addition, some Indonesian higher education institutions have set up exchange and double degree programmes with their foreign counterparts. Because of these programmes, Indonesia also receives international students from, for example, Japan, Norway and African countries.

### 3.4.4 Factors influencing outgoing student mobility

Internationalisation is becoming more prominent in the Indonesian education sector. In the future, this will certainly enable more Indonesian students to gain an international experience during their studies. As the unfamiliarity with the wider academic world will decrease, the internationalisation of higher education could also mean that more Indonesian students will become open to studying abroad. Their willingness to do so is likely to be strengthened by the growing wealth among the Indonesian population and the country's growing population. Although the Indonesian higher education system and sector will probably be improved in the future, at this moment, the push factors that encourage Indonesian students to study abroad are thought to relate to the following aspects:

- In Indonesia, access to higher education programmes and cutting-edge research (and research facilities) can be difficult or impossible.
- Compared with Western countries, the reputation of Indonesia's higher education and research is poor.
- Indonesia's cultural, economic, educational, linguistic, historical, political and religious ties with other regions and countries could be a push factor.
- More and more Indonesian families can afford to send their offspring to study abroad. Given the population growth, demand for foreign study opportunities is expected to rise.
- An increasing number of recruiting countries are beginning to see the potential of Indonesia. As a result, there is extensive information available on potential hosting regions, countries, cities and institutions.
- To encourage students to study abroad, the Indonesian government has made financial incentives (i.e. scholarships) available.

Studying abroad is not an option for all Indonesian students due to financial restraints. Nevertheless, the government focuses on internationalisation and aims to provide more Indonesian students with opportunities to study abroad.

## 3.5 Mexico

### 3.5.1 Introduction

In 2008, Mexico sent more than 25,400 students abroad, which is only a small fraction of the total Mexican student population (1%). Over half of internationally mobile Mexican students went to the United States. Other popular study destinations are mainly in Europe and include Spain, France, the UK and Germany. In the 2010/11 academic year, the Netherlands hosted approximately 350 Mexican students. This is close to a 50% increase since the 2006/07 academic year.

### 3.5.2 National policies to encourage outgoing student mobility

A strategy for the internationalisation of higher education has been set out in Mexico's National Education Plan for 2007-2012.[82] The National Sectorial Programme for Education, the Secretary of Education (SEP) has set out five objectives. The first objective is to "increase the quality of the education so that students improve their level of educational achievement, have means of acquiring better welfare and make a greater contribution to national development". In this plan, the SEP states that one of the means is to "push internationalisation of Mexican higher education and its institutions". The five ways of boosting internationalisation are to:

- Promote the incorporation of an international dimension in the study programmes and activities of Mexican higher education institutions in order to contribute to a better quality of education, strengthen academic competitiveness and capabilities in teaching, research and innovation;
- Encourage collaboration between Mexican higher education institutions and prestigious foreign institutions (or consortia) to encourage the mutual recognition of equivalent credits, studies and diplomas, as well as to promote coordinated exchange programmes to increase the mobility of students, researchers and teachers;
- Support projects and actions that promote cooperation, academic exchange and the formation of networks of academic bodies with foreign higher education institutions (or consortia), including the development of joint educational programmes and degrees;
- Participate actively in the construction of a common higher education space, both in Latin America and the Caribbean and in other regions in the world; and
- Promote the implementation of agreements aimed at stimulating the international recognition of national assessment and accreditation mechanisms in higher education.

The Mexican government also facilitates studying abroad by offering scholarships to postgraduate students through the National Council of Science and Technology (CONACyT), which also supports international research projects. In addition, several other scholarship programmes have been initiated to facilitate both inward and outward mobility.

To reverse the current brain drain, the Mexican government has implemented a repatriation programme for postgraduate Mexican students abroad. This programme finances their return and offers them opportunities to work in the Mexican higher education sector.

In 2009, Mexico and the EU signed a declaration on the mutual recognition of degrees, enhancement of student and staff mobility, and intensification of institutional cooperation. A joint executive plan was drafted to support the implementation of this declaration. In the plan, Mexico and the EU state that "both parties recognise the need to continue promoting and encouraging academic mobility and cooperation between European and Mexican

[82] Secretaría de Educación Pública (2007). *Programa sectorial para la educación 2007-2012*, pp.28-29. URL: http://www.sep.gob.mx/wb/sep1/programa_sectorial.

higher education and research institutions, and to foster youth participation and mobility".[83] Although both parties have signed the declaration, there are indications that the recognition of foreign (European) degrees still causes problems in Mexico.

While there are some national policies, the internationalisation of Mexican higher education is foremost an issue that is being picked up by Mexican higher education institutions. In this regard, worth noting are the double degrees that Mexican universities have set up in cooperation with their American counterparts. The aim of these programmes is to internationalise curricula and support international student mobility.

### 3.5.3 National policies to recruit international students

As described in the previous section, the Mexican government has initiated scholarship programmes not only to send out Mexican students, but also to attract foreign students to Mexico. The rationale behind this is that internationalisation can help improve the Mexican higher education system.

Although not directly related to the recruitment of international students, an interesting development in Mexico is the growing popularity of online post-secondary education. The online education is offered by the National Open and Distance Learning University of Mexico, which was launched by the Mexican government. The interesting aspect is that the online courses are also available to Mexicans living abroad. For 2012, the target is to offer 10,000 Mexicans living abroad access to post-secondary education in this way. The online courses are particularly helpful for Mexicans abroad who are unable or not allowed (because of visa restrictions) to enrol in a higher education institution in their host country. With this policy, Mexico has initiated a form of online transnational education. In time, this initiative may also attract international students, particularly from the Latin American region.

### 3.5.4 Factors influencing outgoing student mobility

Mexico has many private and public higher education institutions. Hence, access to higher education in Mexico is arguably good. However, the quality of the study programmes varies considerably. Indeed, it can be assumed that it is only at the very best institutions that the quality of degree programmes meets " international standards". These institutions are un able to meet the demand for higher education places, which is an incentive for Mexican students to go abroad. As in many other countries, this situation is likely to improve in the future. At the moment, the main factors encouraging students to study abroad are the following:

- Although higher education is widely available in Mexico, access to programmes of the highest quality can be difficult.
- Because of the variety in the quality of education and research, the higher education system as a whole appears to have a poor reputation.
- Mexico has cultural, economic, educational, linguistic, historical, political and religious ties to other regions and countries, which may encourage students to study in these countries.
- The Mexican economy is growing, enabling more students to study abroad and creating demand for internationally educated students in Mexico. Given the proximity of Mexico to major study destinations (the US and Canada), there is extensive information about possible hosting regions, cities and institutions.
- The Mexican government has made scholarships available for studies abroad.

One factor that discourages Mexican students from studying in countries other than those in North-America is the extent to which foreign (European) diplomas are recognised within Mexico. Other blocking factors are the affordability of studying abroad and the high-quality education available within Mexico itself.

[83] Council of the European Union (2010). *Mexico – European Union Strategic Partnership, Joint Executive Plan*, Comillas, 16 May, 9820/10, PRESSE 126, p.31. URL: http://www.consilium.europa.eu/uedocs/cms_Data/docs/pressdata/en/er/114467.pdf.

## 3.6 Russia

### 3.6.1 Introduction

Russian students are increasingly eager to study abroad. In 2008, close to 44,000 students did so. As in many other countries, this is nonetheless still a small fraction (under 1%) of the total student population in Russia. The top five destination countries for Russian students are Germany (which attracts 22% of all Russian outward mobile students), the US (11%), Ukraine (11%), France (8%) and the UK (6%). Around 500 Russian students studied in the Netherlands in 2010/11.

### 3.6.2 National policies to encourage outgoing student mobility

The Russian higher education system is in the process of being reformed. The aim of the Russian government is to reduce the number of regional higher education institutions. As a consequence, the major Russian cities are likely to strengthen their position as academic hubs. The restructuring should also help to raise the quality of education. Russia signed the Bologna Declaration in 2003, and as a consequence, the reform is also set to further implement the bachelor's-master's model in the Russian higher education system. The bachelor's-master's structure, in combination with an improved quality standard, should make it easier for Russian students to apply to "top-class" higher education institutions abroad.

The Russian government has also formulated goals with respect to the internationalisation of higher education. These goals are: to increase the quality, competitiveness and appeal of Russian higher education in global and regional markets, and to promote Russia's effective participation in global education processes.

The recognition of foreign degrees remains an issue in Russia. This is, however, likely to change for the better since the Russian government has announced that it will automatically recognise the degrees of "top-class" institutions in the world. On the one hand, this measure is meant to allow foreign scholars to work and/or study at Russian universities. On the other, it can also be seen as an encouragement for Russian students to study abroad.

To give Russian students the opportunity to study abroad, the Russian government initiated the Russian President Scholarship which provides 40 scholarships to students and 60 to PhD students. Additionally, the government recently announced that it would initiate a new scholarship programme. Although further details are yet to be announced, the reported aim of this new programme is to send 10,000 Russian students to top-class foreign institutions each year. Another development that enables Russian students to include an international component in their studies is the increasing number of double / joint degree programmes between Russian and foreign higher education institutions.

Although not directly related to outgoing student mobility, Russia has made 2011 the German-Russian Year of Science. This initiative is mainly intended to support institutional cooperation in terms of applied research between universities of the two countries. This initiative may, in time, also lead to more student and staff mobility between Russia and Germany.

### 3.6.3 National policies to recruit international students

The Russian government wants to make Russia a more prominent player in the world of science. To that end, it has made more research funds available to international researchers and to Russian researchers living abroad. In addition, the government passed a law that allows non-nationals to teach at Russian universities.

To attract more international students to its higher education system, the Russian government has set up a specialised agency called EduRussia, which aims to promote Russian education abroad. In conjunction with this, the government also plans to substantially increase the number of scholarships it provides to international students and, in this connection, has initiated a scholarship programme specifically aimed at recruiting Indian students.

### 3.6.4 Factors influencing outgoing student mobility

The policies described above reflect the commitment of the Russian government to improve its higher education system. The international dimension of these policies is notable. In the long term, this will enable Russian students to gain international experience while studying in their home country. However, for now, Russian students interested in gaining an international education experience are largely dependent on opportunities to attend full study programmes abroad. The main factors encouraging Russian students to study abroad are the following:

- Russia has some institutions that perform very well in terms of research output. Nonetheless, access to these top-class institutions and their superior higher education programmes is often difficult.
- Russia has cultural, economic, historical and political ties to other countries, which may therefore be particularly attractive study destinations for Russian students.
- Russia's demographic and economic situation can positively affect the degree to which studying abroad is seen as a viable alternative. Russia's political climate also qualifies as a potential push factor.
- Currently, several government-sponsored scholarships are available, which can be a push factor to study abroad. In addition, the announced increase in government-funded scholarships is likely to increase the amount of information available on potential study destination regions and countries.

The fact that foreign degrees are not always recognised in Russia discourages Russian students from studying abroad. The slow implementation of the different aspects of the Bologna Declaration, such as the bachelor's-master's system, in Russia is another obstructing factor.

## 3.7 South Korea

### 3.7.1 Introduction

Over the past years, the number of South Korean students studying abroad has increased drastically. The latest figures indicate that 112,600 South Korean students were studying abroad in 2008. This corresponds to approximately 4% of the entire student population. The most popular study destinations of South Korean students are the US, China, Japan, Australia, the UK, Canada and Germany. The number of South Korean students studying in the Netherlands has also increased substantially in recent years. In 2010/11, there were around 500 Korean students in the Netherlands.

### 3.7.2 National policies to encourage outgoing student mobility

In recent years, the Korean government has increased the quality of its higher education system substantially. With numerous ongoing projects in the field of education, it can be assumed that this process is still continuing. Given these investments in higher education, a growing domestic economy and, from 2012 onwards, a declining population in the college going age bracket, it has been predicted that the number of Korean students going abroad for study purposes is likely to decline in the future.

The establishment of branch campuses from around the world in South Korea, on the explicit invitation from the Korean government, may also contribute to a declining study abroad rate. An interesting development in this respect is the creation of the so-called Incheon Free Economic Zone, an international higher education hub that is intended to host ten foreign universities on one large campus. Interestingly, the Korean Ministry of Education, Science and Technology also intends to enable Korean universities to establish branch campuses abroad. In the future, both developments will make it easier for Korean students to include an international component in their studies, even if they do not actually go abroad.

Another development that could make it easier for Korean students to study abroad, but within the region, is the Campus Asia project, which aims to standardise student evaluation methods (i.e. the study credits) in Japan, China and South Korea. Hence, students from these countries will be able to study in a neighbouring country and

have their earned credits recognised and count towards the programmes in their country of origin. In this sense, this scheme is very similar to the European Credit Transfer System (ECTS) in the EU.

Although most of the effort of the Korean government is focused on enhancing the quality and internationalisation aspect of the domestic higher education system, the government also offers so-called Global Korea Scholarships (GKS) to enable a limited number of Korean students to study abroad.[84] In addition, there are scholarships available for Korean students to study in particular fields and/or in a particular country.

### 3.7.3 National policies to recruit international students

The Korean government has made the recruitment of international students and scholars to Korea a high priority. This is reflected in the actual number of international students in Korea, which went up from 22,500 in 2005 to close to 76,000 in 2009. It should be noted that 70% of these are Chinese nationals.

The aim of the government is to attract 100,000 foreign students to its higher education system by 2012. To achieve this aim, which is part of the Study Korea Project initiated in 2004, the government will lower the health insurance premiums for students from abroad and simplify immigration procedures. In addition to this, the government will invest in accommodation for international students, develop introduction programmes and assist international students in finding work after completing their studies in Korea.

Complementary to the government policies, most Korean universities are also internationalising their curriculums, student populations and staff. Hence, the number of English-taught courses is increasing. With respect to the internationalisation of staff, the Korean government has introduced the World Class University Project, which aims to attract top researchers from abroad.

Offering government scholarships is an important part of the government policy to attract international students. These scholarships are also available under the Global Korea Scholarship (which also provides for outbound mobility scholarships). The inbound GKS consists of around 2,500 scholarships that are available to different categories of students (e.g. students on degree programmes, exchange programmes and training courses).

### 3.7.4 Factors influencing outgoing student mobility

The main factors that encourage Koreans to study abroad are the following:

- The difficult access to high-quality higher education programmes in the country;
- The use of unattractive teaching and learning methods at domestic institutions (such as rote learning);
- The high recognisability, acceptance and value of degrees from foreign (mainly English-speaking) countries, among domestic employers and higher education institutions;
- South Korea's cultural, economic, educational, linguistic, historical, political and religious ties to other regions and countries, particularly those in East-Asia. These regions are therefore likely to be particularly attractive study destinations for South Koreans;
- South Korea's favourable economic climate, which enables many students to study abroad;
- The willingness and financial capability of Korean students to study abroad;
- The relatively high tuition fees charged by South Korean higher education institutions; and
- The availability of some government-sponsored study abroad scholarships.

While there has been a relatively high study abroad rate among Korean students in recent decades, a closer look at the trends and developments in the Korean higher education system suggests that this growth may decline in the future, due to quality improvement of Korean higher education.

There are not many factors that prevent South Koreans from studying abroad. There have been some concerns about the recognition of degrees earned in South Korea and other non-native English speaking countries. Another

[84] Ministry of Education, Science and Technology (2009). *Major Policies and Plans for 2010*, 22 December. URL: http://planipolis.iiep.unesco.org/upload/Korea%20R/Korea%20R_Major%20Policies%20and%20Plans%20for%202010.pdf.

issue is the domestic labour market, for which a domestic degree is sufficient and in some cases perhaps more relevant than a foreign degree. Nevertheless, the unemployment rate among graduates is comparatively high, and studying abroad is a means to attain a better competitive position.

## 3.8 Taiwan

### 3.8.1 Introduction

The Taiwanese ministry of education calculated that more than 33,000 Taiwanese students started a period of study abroad in 2007. Unofficial sources suggest that the total number of Taiwanese students studying abroad is more than 60,000. The five most popular destinations are the US, the UK, Australia, Japan and Canada. The first two destinations are by far the most popular. In the 2010/11 academic year the Netherlands hosted around 300 students from Taiwan.

### 3.8.2 National policies to encourage outgoing student mobility

Many Taiwanese students are interested in studying abroad. They are likely to do so as part of an exchange programme or for a postgraduate degree. For both types of mobility the Taiwanese government has made more than 600 scholarships available. The government also offers study loans for students with an ambition to study abroad.

The Taiwanese students' interest in studying abroad probably stems in part from the already quite internationalised higher education system of Taiwan. This internationalisation is reflected in the growing number of programmes taught entirely in English. It should also be noted that it has been a policy of many Taiwanese universities to encourage students to undertake part of their undergraduate and postgraduate studies abroad. This is made possible by the institutional partnerships between Taiwanese and foreign universities. These types of cooperation are also encouraged by the Taiwanese government.

More recently, the Taiwanese and Chinese governments have agreed to recognise each other's degrees and diplomas. This has made it possible for Taiwanese students to study in mainland China.

Although outgoing student mobility is encouraged by both the government and Taiwanese higher education institutions, government policies and budget are more focused on promoting inbound student mobility. The policies that are in place appear to focus on mobility to the US. Also, government policies are aimed at attracting the students back to Taiwan after graduation abroad.

### 3.8.3 National policies to recruit international students

Taiwan has a substantial number of policies in place to attract international students. These policies have been developed for several reasons: to compensate for a declining domestic population and fill the oversupply of university seats, to promote the government's aim of making the Taiwanese higher education system a "world class" hub of advanced learning, to benefit economically from international students in Taiwan, and to advance the government's aim to increase Taiwanese "soft" power and influence abroad. [85)]

To boost the competitiveness of the Taiwanese education sector and turn it into a hub of advanced learning, the Taiwanese government will invest USD 196 million in higher education over the next four years. This budget will, among other things, be used to improve the study environment of international students and to market Taiwanese higher education abroad. The government target is to attract 95,000 international students to Taiwan by 2014.

Taiwan's main target countries for recruitment appear to be other Asian (and East-Asian) countries, such as India, Thailand and Vietnam. The Taiwanese government also provides financial aid to students from these countries.

85) Sharma, Y. (2011). 'TAIWAN: Bid to attract more overseas students', *University World News*, 16 January. URL: http://www.universityworldnews.com/article.php?story=20110114222445891.

In addition, and as mentioned in the previous section, the Taiwanese government has also opened its higher education system to students from mainland China. In 2010/11, approximately 650 seats were made available to enable Chinese students to study in Taiwan. One third of these seats were actually taken up.

The Taiwanese universities have been given an important role in the internationalisation of Taiwanese higher education, as is reflected in the increased number of English-taught programmes they offer. Also, to support the institutional recruitment efforts the Taiwanese Ministry of Education allocated around US$ 2 million to Taiwanese universities in 2010.

Lastly, there are also government policies in place that aim to attract high-impact scholars from other countries – mainly in order to improve the international standing of the Taiwanese higher education system.

### 3.8.4 Factors influencing outgoing student mobility

A relatively large number of Taiwanese students study abroad. The main factors encouraging them to do so are the following:

- A high recognisability, acceptance and value of foreign (and particularly US) degrees among Taiwanese employers and higher education institutions;
- Taiwan's cultural, economic, educational, linguistic, historical and political ties to other regions and countries, especially within the South-East Asian region, which encourage Taiwanese students to study abroad in these regions and countries;
- Taiwan's declining birth rate and economic growth (leading to more resources to finance a study abroad), which form incentives for Taiwanese students and their parents to consider higher education alternatives abroad. Destinations outside of the US could also become more attractive. Thanks to the long-standing Taiwanese tradition of seeking postgraduate education abroad, there is a large amount of information available in the country on potential study destinations; and
- To stimulate outgoing mobility, the Taiwanese government has made some attractive scholarships available.

There are no important factors that discourage Taiwanese students from studying abroad.

## 3.9 Thailand

### 3.9.1 Introduction

In 2008, approximately 24,300 Thai students studied abroad. This is only a small fraction of the total Thai student population. The five most important destinations for Thai students are the US, Australia, the UK, Japan and Malaysia. The US is by far the most popular destination. In 2010/11, close to 200 Thai students studied in the Netherlands.

### 3.9.2 National policies to encourage outgoing student mobility

There appear to be no coherent policies by the Thai government to encourage outgoing student mobility. Perhaps the single most important exception are the scholarship programmes, such as the Royal Thai Government Scholarships and the so-called King's Scholarship. The latter in particular is a prestigious government scholarship that is awarded annually to approximately nine Thai students intending to study abroad.

There are, however, governmental policies that could indirectly encourage Thai students to study abroad. The most influential of these is a government plan to ensure that a large part of the education system meets international standards. This long-term plan will affect primary, secondary and higher education institutions. In it, the government also states its aim to increase educational cooperation within the ASEAN region.

Thai students are also offered more study abroad opportunities by the Thai universities. These opportunities are enhanced by the supply of courses in foreign languages (e.g. English, Mandarin and Japanese). The actual study abroad opportunities are made possible through, for instance, participation in double degrees taught jointly by Thai and foreign universities.

### 3.9.3 National policies to recruit international students

While outgoing mobility policies are largely absent at the government level, the Thai government is eager to encourage inbound mobility. Although more details are yet to be announced, several policies and goals have already been formulated. The most important goal is that by 2016, Thailand is to have developed into a South-East Asian hub of education, training and international conferences and seminars.[86] This implies that the government aims to recruit more international students to study in Thailand. To that end, the government will establish Excellent Learning Research Centers and Centers for International Vocational Education Development. Furthermore, the government aims to upgrade existing international schools and public and private universities that have already attracted a high number of international students. The Thai government is very clear about why it wishes to attract international students: "Thailand will be improved and serve as an education hub in the ASEAN region. Also, [the Thai economy] will be strengthened due to income from the tuition fee paid by international students".[87]

Although the above plans are yet to be realised, Thailand already attracts around 10,000 Chinese students. Moreover, the other international students in Thailand are both from neighbouring countries and Western countries. The latter group mostly study in Thailand as part of cooperation / exchange agreements between Thai and foreign universities.

### 3.9.4 Factors influencing outgoing student mobility

Costs are the main factor that discourages Thai students from studying abroad. Although the Thai government is making a considerable effort to improve the higher education system, that system is still facing difficulties that encourage students to study abroad. The main difficulties are the following:

- Thai students have little access to high-quality higher education and cutting edge research (and research facilities).
- The value of a national higher education degree on the Thai labour market is somewhat problematic due to a mismatch between the acquired and required skills;
- Compared with their counterparts in other countries, the overall reputation of Thai higher education institutions and their research is poor.
- Foreign degrees are highly recognised, valued and accepted among Thai employers and higher education institutions.
- Thailand has cultural, economic, educational, linguistic, historical, political and religious ties to other countries (including countries within the region), and because of these links, studying in these countries can be attractive for Thai students.
- Following a decline in 2009, the Thai economy is growing again. This could give more Thai students the financial opportunity to study abroad.
- The domestic political climate may encourage students to go abroad for their studies.
- Many countries try to actively recruit students from Thailand. In consequence, there is extensive access to information on foreign study destinations.
- The Thai government provides study abroad scholarships.
- There have been cases where the academic freedom of university professors has been undermined.[88] This could encourage serious and critical researchers and students to work or study abroad.

86) Ministry of Education (2009), op.cit.
87) Ministry of Education (2009), ibid.
88) See for example: Ungapakorn, G.J. (2011). 'THAILAND: Academic freedom and lèse majesté', *University World News*, 22 May. URL: http://www.universityworldnews.com/article.php?story=20110520183637319.

## 3.10 Vietnam

### 3.10.1 Introduction

In 2008, approximately 32,700 Vietnamese students studied abroad. This corresponds to around 2% of the entire Vietnamese student population. The most popular destination countries of Vietnamese students are the US, Australia, France, Japan and Germany. In the 2010/11 academic year, the Netherlands hosted around 400 students from Vietnam.

### 3.10.2 National policies to encourage outgoing student mobility

A substantial number of Vietnamese students study abroad, and this number looks set to continue to grow in the future. The Vietnamese government has taken policy measures that can be seen as encouraging outgoing student mobility. One examples is the relative abundance of government study abroad scholarship programmes for Vietnamese students (such as the Vietnam International Education Development programme). To reduce ongoing the brain drain, in most cases scholarships are awarded on condition that the recipient returns to Vietnam after graduation. A similar condition applies to self-funded Vietnamese students that study abroad. However, the government has announced that it intends to change this.

Another factor that encourages Vietnamese students to study abroad are the many bilateral educational cooperation agreements that the Vietnamese government has signed with many other countries around the world.

The opportunities for Vietnamese students to study abroad directly depend on their foreign language proficiency. The government launched its National English Program 2020 to enhance the English proficiency of students and teachers alike.

In the past years, the Vietnamese government has also shown its intention to improve the quality of the Vietnamese higher education system. For example, 22 new universities were created between 2006 and 2010. The quality of higher education remains an issue of concern, however. Another issue is that the Vietnamese government only allows foreign lecturers to teach at Vietnamese universities if they have the title of professor. There are concerns that this policy actually threatens the quality of education, rather than enhancing it.

Another interesting policy related to the internationalisation of the Vietnamese higher education system is the government's New Model University Project, which provides for the establishment of four universities based on the higher education systems of Germany, France, Japan and the United States.[89] The aim is for these universities to belong to "the top 200 world-class universities in the world" by 2020. However, due the relatively high tuition fees charged by the universities that have already been created within this project, they appear to attract less interest among Vietnamese students than expected.[90]

### 3.10.3 National policies to recruit international students

Recruiting international students to Vietnam is not a high policy priority at this point in time. This is understandable, given the current concerns about the quality of the higher education programmes on offer. The Vietnamese government does, however, have the ambition to attract international students. In fact, the government has even announced its ambition to turn the country into a regional education hub. In line with this ambition, the government has announced its intention to exempt foreign students from Vietnamese university entrance exams. Vietnam's success in attracting international students is likely to depend to a large degree on the government's ability to increase the quality and reputation of its universities. A related concern is the existing and growing competition from other Asian countries that already manage to attract many international students.

89) See for an example: Batista-Mercado, A. (2011). 'VIETNAM: New state-of-the-art S&T university', *University World News*, 8 May. URL: http://www.universityworldnews.com/article.php?story=20110507091322240.

90) No author (2010). 'Top universities fail to enroll students', *Tien Phong / VietNamNet*, 10 December. URL: http://english.vietnamnet.vn/reports/201010/Top-universities-fail-to-enroll-students-941762/.

### 3.10.4 Factors influencing outgoing student mobility

The main factors that encourage Vietnamese students to study abroad are the following:

- At public universities, the study and research facilities are poor, and there is a shortage of physical space and qualified teachers.
- The adopted teaching and learning method of "read and write down" is unattractive. High-quality higher education programmes are scarce, and access to these programmes and cutting edge research (and research facilities) is difficult. Note also that many Vietnamese universities have only recently become active in research.
- Compared with other countries, the reputation of Vietnamese higher education and research is poor.
- The value of a Vietnamese higher education degree on the domestic labour market is undermined by the apparent mismatch between acquired and needed skills.
- Foreign degrees are highly recognised, valued and accepted among domestic employers and higher education institutions.
- Vietnam's economic growth of the past years has made more students/families financially capable of financing studies abroad.
- Vietnam's political climate could be another reason to study abroad.
- Some countries are actively trying to recruit Vietnamese students by organising promotion campaigns. In consequence, the amount of information available in Vietnam on potential study destination countries is reasonably high.
- The Vietnamese government offers relatively many study abroad scholarships.

These factors may improve in the future, due to the government's increased attention to quality improvement of higher education. It is likely that a higher availability of good-quality higher education in Vietnam itself will, in time, encourage students to study in Vietnam rather than abroad.

## 3.11 Argentina

### 3.11.1 Introduction

In 2008, 9,000 Argentinean students studied abroad, according to UNESCO data.[91)] This is only 0.4% of the total student population. The most popular study destinations of Argentinean students are the US, Spain, Cuba, France and Italy. The number of Argentinean students currently studying in the Netherlands is low (fewer than 100). Argentinean students appear to be mainly interested in studying at bachelor's and master's levels.[92)]

### 3.11.2 National policies to encourage outgoing student mobility

The Argentinean government has not set specific strategies and policies to promote outgoing international student mobility. A broad policy to internationalise higher education was developed only recently. This policy is aimed at promoting international dialogue and exchange of experiences, and linking Argentinean institutions to international education and research networks. The Education Ministry supports and promotes the internationalisation of higher education, but leaves it to the institutions to design and implement their own policies.

Most of the governmental focus is aimed at integration into MERCOSUR (South America's leading trading bloc), cooperation with UNESCO, the EU, the Organisation of American States (OAS), the Organisation of Iberian States (OIS) and within bilateral cultural agreements. Hence, a large part of the international student mobility takes place with other Latin American countries within the framework of MERCOSUR. In addition, the international outlook of individual institutions is mainly regional.

91) UNESCO (2010). *Global Education Digest 2010* (Paris: UNESCO), Table 10.
92) U.S. Commercial Service (2007). 'Argentina: International Student Recruitment'. URL http://www.international.ac.uk/resources/Argentina%20-%20International%20Student%20Recruitment.pdf.

### 3.11.3 National policies to recruit international students

Argentina has no explicit government policy to recruit international students, but the Ministry of Education does run a "study in Argentina" website, which offers information and some guidance to prospective international students, e.g. on courses that are officially validated and quality-assured by the Argentinean government and on finding proper accommodation. The Ministry promotes the nation as the most "western" or "European" country on the continent.

Based on a national "social justice" policy, higher education institutions in Argentina do not charge tuition fees, not for home nor for international students. This is an attractive element for those interested in studying in the country. However, partly perhaps because there are no tuition fees, the Argentinean government does not offer any scholarships to enable international students to study in Argentina. Most students from abroad finance their studies themselves, or do so via foreign or international scholarship programmes from MERCOSUR, OAS, OIS and the EU. In recent years, the number of international students in Argentina has been increasing slowly, and most are from MERCOSUR countries and Spain.

Many international initiatives rest with the Argentinean higher education institutions, and they have become increasingly aware of the fact that international students have a positive impact on the quality of education and research and the local economy. Although institutions have started to develop internationalisation policies, so far no coordinated approach has been designed.

### 3.11.4 Factors influencing international student mobility

The Argentinean higher education system has a relatively positive image abroad. However, in terms of international student recruitment within the MERCOSUR area, Argentina faces fairly strong competition from other Latin American countries. At the moment, countries such as Brazil, Chile and Colombia are more active in internationalising higher education and international student recruitment. If this situation continues, this may have a negative effect on the numbers of international students coming to Argentina.

In terms of outgoing student mobility, the following factors may encourage Argentineans to study abroad:

- The country's economic development has improved over the last years, potentially making studying abroad a more affordable option.
- Several Argentinean universities have developed joint degree programmes in collaboration with foreign institutions, which offer study abroad opportunities.
- The number of foreign institutions offering degree programmes in Argentina is relatively low. Italy's University of Bologna set up a local university branch with the authorisation of the Argentinean government. Some US and Spanish institutions also offer programmes in Argentina. The strict regulations issued by the National Commission for Evaluation and University Accreditation (CONEAU) appear to be unfavourable for foreign universities that wish to set up local branches in Argentina. This means that most Argentinean students that are keen to obtain a foreign degree will have to do so through distance education or by going abroad.
- CONEAU participates actively in MERCOSUR's plan for recognising higher education programmes and obtained skills based on common programme evaluation and accreditation frameworks. In addition, the European Union is working with Latin American universities to develop a common credit system in an effort to encourage student and staff mobility, both regionally and worldwide. In time, these two developments will likely encourage outgoing (as well as incoming) student mobility.
- In 2010, university presidents from 24 Ibero-American countries called for the creation of exchange programmes similar to the European Erasmus scheme, and for greater student mobility and increased convergence and uniformity in higher education structures. If developed, this initiative may encourage outgoing (and incoming) student mobility.

The main obstacles to studying abroad among Argentineans are the following:

- a lack of competence in other languages than Spanish, and
- a lack of institutional interest in promoting educational programmes abroad.

To sum up, the Argentinean government has not developed any clear policy strategies and instruments to increase outgoing and incoming international student mobility. Current national initiatives to develop systems for the mutual, international recognition of degrees may in time encourage greater student mobility to and from Argentina. Currently, international student mobility and exchanges are mostly with other Latin American countries, the US and Spain – and due to language and other cultural similarities, institutions from these nations may be at an advantage in recruiting Argentinean students.

## 3.12 Chile

### 3.12.1 Introduction

In 2008, over 6,600 Chilean students studied abroad, according to UNESCO.[93] This is approximately 1% of the total student population. The most popular study destinations of Chilean students are the US, Spain, France, Argentina and Germany. The number of Chilean students currently studying in the Netherlands is low (fewer than 100).

### 3.12.2 National policies to encourage outgoing student mobility

The government encourages outgoing student mobility through scholarships and some international collaboration agreements on student and researcher exchange. For instance, the government-based Chilean Agency for International Co-operation (AGCI) offers information on study abroad opportunities for Chilean students, and scholarships to do so.

In 2008, then president Michelle Bachelet unveiled Chile's Bicentennial Fund for Human Capital Development, which in the first two years of its existence granted scholarships to enable over 5,000 Chilean students to study abroad at elite foreign universities.

That same year, the Chilean government established the Becas Chile scholarship programme to send "the next generation of Chilean leaders" abroad for master's and doctoral study programmes and internships in the areas of energy, biotechnology, IT, environment, education, health, public policy, mining, aquaculture, food industry, tourism, global services, science and engineering. These areas were selected as crucial for Chile's human capacity development. In 2008 alone, the government invested US$ 6 billion in postgraduate study-abroad scholarships. The Becas scholarship programme combines a range of study abroad scholarships that were previously administered by different agencies and ministries. The scholarships require recipients to return to Chile on completion of their studies abroad and remain in Chile for twice the number of years for which they were given a scholarship. The scholarships can be used for study purposes all over the world; in 2009 the most popular study destinations for master's and doctoral students were the US, the UK, Spain, Australia, Canada, Germany and France.

In recent years, the Chilean government signed a range of exchange agreements with governments in Australia, Canada, New Zealand, the US and the US State of California, in the area of language training and offering special visas for Chilean students and researchers.

In 2011, the government signed a research collaboration agreement with the Chinese government. As part of this agreement, China agreed to reserve places for postgraduate students from Chile.

### 3.12.3 National policies to recruit international students

In 2008, Chile hosted nearly 8,000 foreign students. The enrolment of foreign students at Chilean universities has grown by 700% in the past decade, with North Americans leading the increase. With one of the most highly regarded education systems of Latin America, Chile receives a large number of students from other Latin American nations.

93) UNESCO (2010), op.cit.

There is no clear and extensive government policy in Chile on international student recruitment, but some policy measures can be identified. The Chilean Agency for International Cooperation, for instance, offers postgraduate scholarships for studying in Chile. In addition, the Chilean government has support programmes in place for the establishment of joint degree programmes with foreign universities. Such programmes can be a means to encourage incoming and outgoing student mobility.

Chile's Ministry of External Relations operates an official Chilean export bureau, called PROCHILE, to encourage the export of Chilean products and services, including higher education. With support of PROCHILE, Chilean higher education institutions promote the country abroad as an international study destination for foreign students. The PROCHILE initiative has supported missions to prospective markets, market analyses, seminars and training in Chile and abroad, and participation in higher education fairs in a range of Latin American countries and the US. Nevertheless, the government seems unsure about how "aggressively" it wishes to compete in the international student market.[94)]

Several intermediary organisations focus on recruiting foreign students to Chile. These include Chile's Universities Enrolment Division and several US organisations that recruit North American students to Chile. These US agencies recruit students, charging US$ 6,500-12,500 per semester, of which US$ 2,500-3,000 is allocated to the Chilean university. This process was gradually developed since the mid-1990s in response to foreign demand for studying opportunities in Chile. It does not reflect a clear and coherent offer of services from Chile as part of government policy to encourage internationalisation of higher education.

Some foreign higher education institutions offer degree programmes in Chile. Spanish and Brazilian institutions are the main providers of foreign face-to-face programmes in Chile. These foreign initiatives are strongly based on commercial interests, i.e. the wish to generate additional tuition fee income from Chilean students. A few US universities have established study abroad offices in Chile, while the University of Heidelberg (Germany) has an office in Chile from where it recruits Chilean and other students for a German-Chilean joint degree programme. These initiatives do not originate from the Chilean government either.

For Chilean higher education institutions, international students represent a significant source of revenue. International students in Chile pay higher tuition fees than domestic students, and these fees are also high in relation to those charged in other countries.[95)] Several Chilean institutions offer programmes abroad, such as diploma and MBA programmes in Argentina, Bolivia, Ecuador and Guatemala. A few Chilean institutions have even created campuses abroad (in Argentina, Ecuador, Spain and the US) to attract foreign students. A small number of universities offer and market short-term (two-week to six-month) programmes for international students in a wide range of subject areas. Some individual institutions offer international students attractive payment schemes in the form of grants or reduced tuition fees. Overall, however, most higher education programmes in Chile are not strongly internationalised.

The Chilean government is also investing heavily in improving the quality of the state universities and in developing degree programmes in the humanities, arts and social sciences, partly in an effort to attract international students and professors.

### 3.12.4 Factors influencing international student mobility

Chile is an attractive study destination for international students because Chilean higher education programmes, especially those offered by the traditional research universities, have a competitive edge in the region due to their tradition and prestige. On the other hand, there is no clear government policy on internationalisation of higher education yet. Chilean researchers that completed postdoctoral fellowships abroad have contributed to an expansion of international academic networks on their return to Chile. These networks can be instrumental in the internationalisation of Chilean higher education, and make Chile a more attractive study destination for international students.

94) OECD and International Bank for Reconstruction and Development (IBRD)/The World Bank (2009). *Tertiary Education in Chile.* Paris: OECD and Washington D.C.: The World Bank.
95) OECD and International Bank for Reconstruction and Development (IBRD)/The World Bank (2009), op.cit.

The shared language of Latin America (excluding Brazil) offers good opportunities to promote international student mobility within the region, and as one of the Latin American countries offering the highest quality of higher education, Chile could benefit substantially from such a market. Nevertheless, the Chilean government has not defined a clear policy on this.[96)]

Overall, the following factors encourage Chilean students to study abroad:

- In recent decades, Chile has moved towards economic stability and economic growth, in comparison with other Latin American countries, which opens opportunities for studying abroad.
- The number of young Chileans moving on to higher education is expected to grow in the coming two decades; this may offer recruitment opportunities for foreign universities.
- There is an oversupply of undergraduate places in Chile, and a comparative lack of postgraduate programmes (especially since the number of students on postgraduate programmes has risen in the past decade).

The following factors may discourage Chilean students from studying abroad:

- On average, Chileans are less proficient in English than other Latin Americans, making outgoing mobility to other Latin American countries more common. The Chilean government has initiated a programme to promote bilingualism in educational institutions with language classes in English, French, German and Mandarin, but it will likely take time for this to produce an effect.
- Chile (in 2009) does not have a clear credit transfer system applicable to all higher education institutions, nor is it part of the network of National Academic Recognition Information Centres, through which higher education institutions and employers in one country can establish how qualifications gained or studies undertaken in another country compare or equate to their own, for purposes of entering or continuing higher education or taking up professional employment.
- A Chilean qualifications framework is being developed, which will likely improve the portability of qualifications between Chile and other countries. However, in Chile, qualifications still tend to be described in terms of the time taken to complete a course, rather than in terms of the competencies gained.

There appear to be opportunities to recruit Chilean students, particularly at the master's and doctoral levels and in study areas prioritised by the Becas scholarship programme. As Chilean higher education institutions are gradually internationalising, there are also opportunities for establishing international student exchanges with Chilean institutions. However, since the proportion of Chilean students that are proficient in English is relatively small, Spanish-speaking countries remain at an advantage in the Chilean recruitment market.

## 3.13 Colombia

### 3.13.1 Introduction

In 2008, approximately 18,100 Colombian students studied abroad, according to UNESCO.[97)] This is a small proportion (just over 1%) of the total student population. The most popular study destinations of Colombians are the US, Spain, France, Germany and Australia. Currently, there are 200 Colombian students in the Netherlands.

### 3.13.2 National policies to encourage outgoing student mobility

The Colombian government offers study abroad scholarships, which are administered by the Colombian Institute for Educational Loans and Technical Studies Abroad (ICETEX). ICETEX also administers scholarship programmes (for domestic and international students) funded by non-government authorities. In addition, the organisation functions as the central contact point for scholarship programmes offered to Colombian nationals by foreign governments and organisations (mainly from Spain, the US, France, Germany, other Latin American countries and the Organisation of American States).

96) OECD and International Bank for Reconstruction and Development (IBRD)/The World Bank (2009), op.cit.
97) UNESCO (2010), op.cit., Table 10.

The government-funded study abroad scholarships are meant to encourage Colombian students to study at prestigious institutions abroad. The scholarships are strongly geared to areas that are important for national capacity development, namely biodiversity, sustainable development of water resources, electronics and mathematics, health sciences and Colombian social studies. To ensure that studying abroad has a positive impact on national development, the scholarship programme requires recipients to return to Colombia on completion of their studies abroad.

The Colombian government has also signed bilateral student exchange agreements with other countries, mainly within Latin America but also with Spain, the US, France and Australia. Several of these agreements include the offer of joint scholarship funds to develop international student exchanges.

### 3.13.3 National policies to recruit international students

Colombian outgoing student mobility is higher than its incoming student mobility. However, as part of the government's current plan to internationalise higher education, the Ministry of Education aims to attract more international students and staff to Colombian institutions. So far, ICETEX has awarded scholarships to approximately 4,800 foreigners who have come to Colombia to pursue postgraduate studies, pursue continuing education or conduct research (these scholarships are co-funded by the Organisation of American States). ICETEX subsidises the presence of foreign professors and language assistants from France, Jamaica and the United Kingdom.

Furthermore, the Ministry of Education has developed an internationalisation policy for higher education in order to increase the quality and the international visibility of Colombian higher education. Encouraging international student and staff mobility, the internationalisation of curricula and the development of international double and joint degree programmes are part of this plan.

### 3.13.4 Factors influencing international student mobility

There are several factors that encourage Colombian students to study abroad. These include the following:

- There are some study abroad scholarships available in Colombia that are not funded by the Colombian government. One example is a scholarship programme for master's and doctoral studies abroad, offered by the Foundation for the Future of Colombia (COLFUTURO) and funded by a large number of Colombian organisations and companies. Another example is the European Commission-funded High-Level Scholarships for Latin America Programme, which enables Colombian (and other Latin American) students to study in Europe – with Spain as Spanish-language destination being the most popular. Colombian higher education institutions also participate in the Academic programme for Student Mobility of the Latin American University Union.
- Colombian higher education institutions have become more committed to internationalisation. At the moment, 82% of Colombian higher education institutions are involved in international student and staff mobility in one way or another.[98] Over 80% of higher education institutions have established central international offices, have created centres to teach a second language and have made second-language proficiency a compulsory requirement for graduation. These measures may enable more students to study abroad.
- Colombia has a large population of over 44 million and a rapidly growing economy. In time, more students may be able to afford studying abroad.
- Higher education institutions from several countries (from Latin America, but also from Spain, France, the US, Australia, Canada and the UK) are conducting promotional campaigns in Colombia to recruit Colombian students. These campaigns may increase local awareness of study abroad opportunities, and can potentially increase outgoing mobility.

On the other hand, studying abroad among Colombian students is still hindered by several factors, such as:

- Inadequate second-language capabilities;
- A lack of adequate funding for study abroad;

98) Ministry of Education (2010). 'Grafica de indicatores generals del proyecto'. URL: http://menweb.mineducacion.gov.co/proyectos_men/REPORTE_GRAFICA/repo_grafi.asp?codi_poli=103&codi_proy=447.

- Inflexible curricula in Colombian higher education;
- An inadequate availability and dissemination of information on study abroad opportunities; and
- An unwillingness of Colombian institutions to recognise study programmes attended or degrees earned abroad.

The above analysis suggests that the Colombian demand for study abroad opportunities is at the master's and doctoral levels, and in study areas that contribute to national capacity development. There also appear to be opportunities for foreign institutions to create joint degree programmes with Colombian institutions. However, as in the case of Argentina and Chile, due to second-language difficulties, Spanish-speaking countries remain at an advantage in the Colombian recruitment market.

## 3.14 Egypt

### 3.14.1 Introduction

In 2008, approximately 8,700 Egyptian students studied abroad, according to UNESCO.[99] This is only 0.3% of the total student population. The most popular study destinations of Egyptians are the US, the UK, France, Germany and Canada. The number of Egyptian students currently studying in the Netherlands is low (fewer than 100).

### 3.14.2 National policies to encourage outgoing student mobility

Government policies encourage strategic alliances between Egyptian and foreign higher education institutions through the development of exchange and collaborative degree programmes, and these partnerships have encouraged Egyptian students to spend one semester or one year abroad. The Ministry of Education also allocates study abroad scholarships to over one thousand postgraduate students a year. These scholarships are mainly aimed at encouraging full or partial PhD studies abroad, and research periods abroad for academic staff. Approximately half of all students that study abroad on Egyptian government-allocated scholarships do so in North Africa and the Middle East (the MENA region) and nearly all are enrolled at bachelor's level. From the government-funded postgraduates that study abroad, nearly all choose Europe and North America.

### 3.14.3 National policies to recruit international students

In recent years, the Egyptian government has started to implement a large development plan to strengthen the national higher education and research sectors, particularly in the areas of medical sciences, engineering and technology. The development of an internationalisation policy for higher education is another top priority. This policy is mainly aimed at attracting more international students to Egypt, particularly from the Middle East, Africa and other Islamic countries around the world. To this end, the government introduced tuition fees for international students at the public universities (these fees vary per course programme, but generally range between € 750 and € 2,500 a year). The government also encourages an expansion of private and non-profit higher education in the country, to widen capacity both for domestic and international student enrolment. Over the past decade, the government sent lecturers abroad to learn new teaching modes that can be adopted at home. Egypt's strategic plan for 2007-2022 set the target of having 150,000 international students enrolled in Egyptian higher education by 2022.[100] In 2008, the country hosted 35,000 international students.[101]

In the past decade, several government projects were initiated to examine the feasibility of introducing a "Bologna"-compatible higher education structure in Egypt. Structural measures have been taken to enable Egyptian higher education institutions to establish collaborative degree programmes, twinning arrangements and exchange programmes with higher education institutions abroad. As a result, most institutions have created one-year or one-semester exchange programmes to attract international non-degree-seeking students. The recent implementation of quality assurance and accreditation procedures, the expansion of private higher education in the country, and better procedures for mutual recognition of foreign degrees may also encourage incoming student mobility.

99) UNESCO (2010), op.cit, Table 10.
100) Said, M.E. (2008), op.cit.
101) UNESCO (2010), op.cit., Table 10.

The five foreign universities in Egypt (American, German, British, French and Canadian, of which only the American university was established before 2003) also recruit international students. The American and British universities were established on the initiative of the Egyptian and US/British government, whereas the German, French and Canadian Universities in Egypt were initiated by a group of Egyptian entrepreneurs, and diplomats or academics. The purpose of these universities was not to encourage student mobility, but to introduce new degree programmes and pedagogies in Egyptian higher education, through academic support of foreign universities. In recent years, these universities have partnered with foreign universities in the US, Canada and Europe to establish dual degree and study abroad programmes, credit transfers and staff exchanges. They also recruit international students, particularly from the Middle East, but also from other regions. The American University in Cairo recruits international students to continue its tradition of creating a bridge of cultural understanding, and it is the leader among Egyptian higher education institutions in attracting international students.

The Egyptian government offers study in Egypt scholarships to students from African states in particular.[102] Government plans to improve relations with Arab and African countries in the region may lead to increased student mobility, both inbound and outbound. Most international students in Egypt are from the Middle East and North Africa (the MENA region), and many of them are particularly attracted to Egyptian higher education because of the relatively modest cost of Egyptian higher education and because language is not a barrier. A large proportion of international students in Egypt (mainly coming from Arab, African and Islamic countries) have chosen Egypt to pursue religious studies at the oldest Islamic University in the world. Students from other countries are mainly attracted to Egypt's offer of cultural studies. Many private higher education institutions in Egypt have created special centres and programmes in specialist areas (such as the Arabic language, archaeology and Arab music) targeted at international non-degree-seeking students.

### 3.14.4 Factors influencing international student mobility

Egypt's overcrowded higher education system is a blocking factor to international student recruitment. Most institutions do not actively attract international students, and many lack an adequate infrastructure to accommodate them. In recent years, it has been difficult for students whose home countries have political conflicts or unstable relationships with Egypt, to obtain a student visa for the country. These students also face rigid immigration policies and higher tuition fees compared with Egyptian students. More generally, the socio-economic and political revolution that took place in the Spring of 2011 may also discourage some international students to study in Egypt in the short-term – although its effects are unclear at the time of writing.

In terms of outgoing mobility, the following factors make it attractive for Egyptian students to study abroad:

- There is a serious shortage of higher education places in Egypt. The country has an average annual population increase exceeding 2%, and together with an increase in the 18-23 cohort eligible for admission into higher education, this presents a burden on the national higher education system.[103]
- Egypt's nineteen public universities suffer from funding shortages and inadequate facilities. Critics say the quality of their graduates is too low to meet the requirements of the labour market. Egypt also suffers from a relatively high brain drain among scientists and academics, due to poor working conditions – including a lack of academic freedom and low salaries – and relatively low living standards.[104]
- Egypt has a low employment rate for graduates, and having a foreign degree improves students' employment opportunities in the country.
- The level of research activity in Egyptian universities is low, and curricula are often narrow and outdated.
- Domestic economic growth in the past decade has led to the formation of a growing middle class with more economic spending power – 85% of Egypt's population is now ranked as middle class, according to the African Development Bank.[105]
- The current political instability with university protests and temporary closures may encourage those who can afford it to study abroad.

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[102] Said, M.E. (2008), ibid.
[103] Said, M.E. (2008), ibid.
[104] Zoepf, K. (2005). 'In Egypt, grand plans meet harsh realities', *The Chronicle of Higher Education*, 12 August. URL: http://chronicle.com/article/In-Egypt-Grand-Plans-Meet/5237.
[105] Mubila, M and M.S. Ben Aissa (2011) 'The Middle of the Pyramid: Dynamics of the Middle Class in Africa', *Market Brief,* 20 April. URL: http://www.afdb.org/fileadmin/uploads/afdb/Documents/Publications/The%20Middle%20of%20the%20Pyramid_The%20Middle%20of%20the%20Pyramid.pdf.

There are also factors that discourage Egyptian students from studying abroad. These include the following:

- Public universities in Egypt do not charge tuition fees (although Egypt's Education Minister called for the introduction of fees at public universities in the Spring of 2011), whereas higher education institutions in many other countries charge fees for international students.
- Many Egyptian students wanting to study abroad face difficulties in English-language competency, academic proficiency and scientific skills.

Given the fact that Egyptian government scholarships are mainly available for a study abroad period of one semester or one year, and for a partial or full PhD programme abroad, the main opportunities for foreign universities to recruit government-funded students from Egypt appear to be at PhD level and through exchange programmes at bachelor's and master's levels. The main study destinations of Egyptian students are countries that operate (or provide academic support to) a university in Egypt. Establishing student exchange or collaborative degree programmes increases student mobility from Egypt to the partner country. When Egypt's current political crisis is over and if the economic downturn can be reversed, more students may be able to afford studying abroad.

## 3.15 Conclusion

This conclusion starts with a general reflection on the level of outgoing mobility in the research countries, followed by a summary of common policy measures. In the final section, the policy measures are analysed from a broader perspective.

### 3.15.1 Outgoing mobility in general

The analysed countries have a combined outgoing mobility of close to 1 million students (2008 figures; see Table 3). Assuming that total outgoing mobility worldwide was 3.2 million in 2008, the analysed countries provide around 30% of international mobile students in the world.

*Table 3: Total outgoing mobility of the analysed countries in 2008*

| Country | Total number of students studying abroad | % of total student population |
|---|---|---|
| China | 441,186 | 1.7% |
| India | 170,256 | 1.0% |
| South Korea | 112,588 | 3.5% |
| Russia | 43,982 | 0.5% |
| Taiwan* | 33,021 | 2.5% |
| Vietnam | 32,727 | 2.0% |
| Indonesia | 30,286 | 0.7% |
| Mexico | 25,444 | 1.0% |
| Thailand | 24,272 | 1.0% |
| Brazil | 23,410 | 0.4% |
| Colombia | 18,082 | 1.2% |
| Argentina | 9,060 | 0.4% |
| Egypt | 8,709 | 0.3% |
| Chile | 6,664 | 0.8% |
| **Total** | **979,687** | **1.2%** |

Based on 2008 UNESCO data

* Estimate by Taiwanese Ministry of Education

Although the total number of internationally mobile students is growing fast and is already significant, it is still only a fraction of the entire student population in the world. In fact, in most analysed countries the students studying abroad make up less than 1% of the entire student population. The country with the highest percentage of students studying abroad relative to the entire student population is South Korea. The numbers suggest that

access to education abroad is, perhaps logically, restricted to a small part of the student population worldwide. On the other hand, the numbers also suggest that substantial growth is possible. The next section discusses the implemented and proposed policy measures regarding outgoing mobility of the analysed countries.

### 3.15.2 Policy measures to stimulate mobility in recruitment countries

The extent to which governments actively encourage their students to study abroad varies substantially. Several of the countries analysed in this study have policies in place to actively encourage studying abroad. The other countries in this study generally have some scholarships available to facilitate outgoing student mobility. Of the countries researched, the most active study abroad policies are undertaken by the governments of Brazil, Chile, China, Mexico and Vietnam. Studying abroad does not appear to be actively encouraged in Russia, South Korea, Thailand and Argentina, although some of these countries do have a (sometimes very) small number of study abroad scholarships available. The governments of Brazil and Russia have announced plans to offer additional scholarships (75,000 scholarships in Brazil and 10,000 in Russia), but at the time of writing those plans have not yet been implemented.

Also note that most government-sponsored scholarships are provided on condition that the recipient return to the home country after graduation. This condition is set to help prevent the brain drain effect (although, if brain drain is really to be prevented, the pull and push factors of the home country would need to be improved, such as local higher education capacity and career opportunities). Moreover, most internationally mobile students are self-financed and can thus not be forced to return home on completion of their studies abroad.

This chapter has shown that common policy measures taken at a national level are often in the form of bilateral agreements focused on education. These policies include an expansion of mainly (but not only) regional student exchange agreements, and agreements on mutual recognition of credits and qualifications. In some cases, specific scholarship programmes have been made available under those agreements. Academic cooperation (including student exchange) can also be enhanced by bilateral agreements between countries (such as the ‘German-Russian Year of Science). The higher education institutions in the recruitment countries play a substantial role in developing these kinds of partnerships. In general, in many of the countries studied in this chapter the institutions appear to be very willing to cooperate with their foreign counterparts. The partnerships can have several aims, such as developing scientific cooperation, student/staff exchange, curriculum exchange and joint educational programmes. In many countries, these forms of cooperation are seen as an opportunity to enhance the quality of domestic higher education. When successful, they could become a pull factor for students to study in their home country instead of abroad.

Most of the higher education systems in the countries analysed in this study are in a process of development. As part of this process, many new institutions are being created in several countries. In this respect, it is interesting to note the openness of several governments to invite or allow the establishment of foreign-backed universities and/or branch campuses of foreign higher education institutions within their borders. Transnational education is thus allowed by some countries, and even stimulated by others in order to increase local capacity building. Notable examples are Vietnam’s New Model University Project and India’s long-awaited and forthcoming Foreign Universities Bill.

Another important method to improve the higher education systems commonly used by the countries analysed in this study is internationalisation of higher education. This is reflected not only in the partnerships mentioned above, but also in government efforts to improve English-language proficiency, initiate programmes offered in English, internationalise curricula and attract foreign academic staff and students. Interestingly, the internationalisation of the higher education systems is also noticeable in countries were government policies on internationalisation are largely absent. In this situation, the internationalisation effort is taken up by the domestic higher education institutions themselves.

A further interesting feature of the countries analysed in this chapter is their focus on recruiting international students themselves. In some cases, policy attention is directed more towards increasing inbound mobility than to outbound mobility. In fact, out of the fourteen countries analysed in this chapter, six have explicitly announced

their intention to become a regional international education hub for international students. It is rather surprising that so many "neighbouring" countries have set themselves this aim, because most of these countries are still very much in the process of strengthening their higher education systems.

Another interesting development in the recruitment countries is that in some cases their mobility policies focus on the region rather than the world at large. A clear example of this can be found among the members of the Association of Southeast Asian Nations (ASEAN) and among the MERCOSUR member countries in Latin America. Also note the Campus Asia project of South-Korea, Japan and China, which aims to standardise student evaluation methods. This project shows similarities to the European ECTS scheme.

### 3.15.3 Reflecting on the mobility policies of recruitment countries

National policies to encourage outgoing mobility show many similarities. The same applies to international student recruitment policies. These policies (focusing, for instance, on higher education marketing and establishing promotion agencies) are similar to those adopted in the more established recruiting countries (which are described in Chapter 2). It is also interesting to note that the target countries for recruitment mimic the inbound mobility policy rationales *(inter alia*, the economic benefits) of the more established recruiting countries. Some countries have nonetheless initiated unique mobility policy measures. Examples are Mexico's online transnational education programmes, and the usages of low health insurance premiums for international students as a pull factor measure in South Korea.

In the coming years, the recruitment countries analysed in this chapter are likely to further improve their higher education systems. Internationalisation is a popular method to achieve this. The increase in the quality and international orientation of higher education could mean that students from the recruitment countries will become less motivated to study abroad. Nonetheless, student motivations to study abroad also depend strongly on other contextual and push factors, such as the (over)availability of good-quality higher education, the demographic situation and the economic context. It must also be noted that in the current situation, the relevance of these factors differs between many of the analysed countries. In fact, governments in some nations (e.g. Malaysia) have proved to be able to improve their domestic higher education to such an extent that they have indeed become more attractive, not only to their home students, but also to international students.

Furthermore, it is especially those countries that have active mobility policies for both outgoing and incoming students that appear to strive for a balance between the numbers of outgoing and incoming students. Perhaps the best example in this respect is Taiwan. Given their current government policies, China and South Korea can also become examples of more balanced incoming and outgoing mobility flows, although their balance is currently still very much tilting towards outgoing mobility. Some countries (e.g. Chile and Egypt) receive more students than that they send out. It is clear, therefore, that several of the so-called target recruitment countries analysed in this chapter are also recruiting countries themselves – which may be the result of active government policies or not. The position of these countries as "recruiting countries" may be strengthened in the future, particularly when some of their proposed policies (e.g. to become an international education hub) will come to effect.

Overall, global competition for recruiting (the best) students looks set to intensify in the future. As can be seen from the Asian countries, for instance, this battle is fought not only in the global arena, but also at the regional and national levels. Importantly, international mobility patterns are not fixed, but flexible. Countries that currently manage to attract high numbers of international students cannot assume that their current levels of incoming student mobility will automatically continue in the future. Continued efforts to recruit and attract are thus necessary. High-quality education programmes are equally necessary, as are efforts to support international students, e.g. to help them integrate in their destination country. Doing so will create satisfied students and, in the future, satisfied alumni. This will reflect well on the reputation of the higher education institution and the image of the hosting country.

The next chapter offers an analysis of the emerging implications of student mobility policies and contexts for recruiting countries in general and for the Netherlands in particular.

# Chapter 4: Conclusions and Implications

## 4.1 A multipolar world with increased competition for students

The increased economic importance of higher education and research has led to the creation of an international higher education market, with strong international competition for knowledge (workers). At the same time, competition also leads to the formation of strategic international collaborations, both in research and education.

This study has shown that the number of countries that are actively involved in international student recruitment has grown considerably. Many countries that previously only sent students abroad, have started to improve the quality of their own higher education and developed strategies and policies to attract international students themselves. These countries include China, South Korea, Mexico, and – to a lesser extent – Russia, Taiwan, Thailand, Brazil, Argentina, Chile and (at least until the recent political change) Egypt. Their target countries for recruitment are often within their own (Asian, Latin American, or North African) region, and to a large extent correspond to the main target recruitment countries of the big players in the global recruitment market (the US, the UK, Australia, Germany and France). Interestingly, several of the countries studied in this report have indicated their ambition to become top destination countries for higher education and research in their respective region (e.g. Switzerland and China), or to become international higher education hubs (e.g. Singapore, Malaysia and Thailand) that will contribute to raising the country's international economic competitiveness.

In consequence, we can identify two distinct developments:
1.More and more countries are competing for students from many of the same group of countries, and
2.The division between recruiting and target recruitment countries is blurring since several countries are key recruitment countries for other nations, while they are also actively recruiting international students themselves.

Although different rationales and strategies for international student recruitment exist in the analysed recruiting and recruitment countries, there is some overlap as well. In most countries, international student recruitment and attracting highly skilled workers are becoming more important to increase the quality of the domestic higher education system and to contribute to the further development of a knowledge economy. International students are also considered to be important as their expenditure contributes to local economic growth.

Several traditional recruiting countries (such as Australia, the UK and France) have implemented stricter student visa and immigration regulations, to ensure that only highly talented students and highly skilled workers enter the country. They have also made it more difficult for international students to stay after graduation to find employment, unless the students work in fields where the country experiences labour market shortages.

The situation in the target recruitment countries is different. Many of the target countries have policies in place to reduce brain drain by trying to lure back their own students and staff after a period of study or work abroad. This is the case in Brazil, Mexico, Colombia, China and Taiwan. Students on government scholarships from these countries are often required to return after having graduated abroad.

## 4.2 Changing directions of mobility

The more traditional study abroad destinations, such as the US, Europe and Australia, will likely remain study destinations in the foreseeable future. However, as a consequence of this multipolar world and increased international competition for students and knowledge, directions of international student mobility are beginning to change, essentially in two ways.

In the first place, with the economic and political balance of power shifting east, international mobility patterns are beginning to change in this direction as well. The clearest example of this is China, which, as the second most powerful economy in the world, is rapidly becoming an interesting study destination for students from all over the globe. This development is actively encouraged by the Chinese government. At the same time, a growing

number of Asian students in the US, particularly those from China, are keen to return home and start a business on completion of their studies in the US (since the US economy is stagnant while several Asian economies are growing at 8% a year). China is therefore likely to become an important competitor in the worldwide international student market, potentially followed by other countries with active recruitment policies, such as Malaysia.

Secondly, the regionalisation of international student mobility is accelerating. More and more students are studying abroad within their own region. This development is most obvious in Asia and Europe, but is also taking place in West-Africa and East-Africa. The increased regionalisation is mainly due to (i) the improved quality of higher education in many parts of the world, which offers opportunities for good-quality education in regions where such opportunities used to be scarce, and (ii) the gradual development of regional "higher education areas" in Asia, East-Africa, West-Africa and Latin America. Following the model of the European Bologna Process, countries in these regions are collaborating or planning to remove barriers so as to enhance the mobility of students and staff, with the ultimate aim of strengthening regional economic growth and innovation.

If these regional higher education areas take shape, international student mobility is likely to regionalise further. In addition, if more countries restrict immigration opportunities for foreign students/graduates in the future, more international degree-seeking students may opt to study in another country within their own region where there are regional agreements facilitating mobility (rather than in countries with strict immigration rules). By building and expanding long-term education and research collaborations with institutions in other parts of the world, such as Asia, universities can further develop exchange programmes to "guarantee" a flow of incoming students from outside of their region.

## 4.3 Implications for the Netherlands

*The need for a broad focus on Europe and a targeted focus outside of Europe*

The Dutch policy-making model provides for clear institutional autonomy to determine international student mobility policies at the institutional level. At the same time, within the European Higher Education Area (EHEA), it is logical that Dutch higher education institutions concentrate on European collaboration, placing a strong emphasis on educational and research collaboration within a wide range of countries in Europe. Such collaborations would take advantage of European-level funding and include measures to encourage incoming and outgoing student and staff mobility, for instance through joint research initiatives and double or joint degree programmes with foreign partners, both at the undergraduate and postgraduate levels.

Dutch higher education institutions need to develop strategic cooperation with partner institutions outside of Europe in selective areas of expertise. Particular emphasis will be placed on postgraduate education and research, although the institutions themselves decide, in their strategic plans, in which areas worldwide collaboration is most meaningful and which strategic partners are the most suitable. It also makes sense for universities of applied sciences with high-quality, specialist niche areas to develop specialist collaborations with institutions outside of the EHEA.

*The need for a coherent integral national strategy, consistently followed*

Of the countries studied in this report, Germany and Switzerland are interesting because their governments have developed focused international student recruitment policies that are aligned with other policies. The German government has developed a coherent policy framework based on one vision and investments that have been sustained over many years. This approach appears to have formed a solid basis for success in international student recruitment.[106)] The Swiss government has developed a strategic policy strongly focused on master's and PhD recruitment, instead of attracting a high number of bachelor's students. In Switzerland, international student recruitment strategies are integrated into bilateral research collaboration and supported by scholarships for foreign master's and PhD students. This is a strong basis for recruiting more international postgraduates.

[106)] Examples of the German success are the following:
1. Nearly 11% of all students enrolled in German higher education are full degree-seeking students from abroad. In the Netherlands this percentage is nearly 7%.
2. In Germany, 68% of all foreign degree-seeking students in the country are from outside of the EU. In the Netherlands, only 35% of foreign degree-seeking students are from outside the EU.

Sources: Nuffic (2011) Mapping Mobility 2011. The Hague, Nuffic & OECD (2011) Education at a Glance 2011. Paris: OECD.

International student recruitment, particularly at postgraduate levels, appears to be supported and strengthened by the development of a national strategy in which the international positioning of higher education and research is integrated into national research agendas and foreign economic policy. To be effective, such strategies must be coherent and implemented consistently over a longer period of time. Within such a strategy, international student mobility is increasingly integrated into broader forms of international higher education partnership, such as international double degree programmes and bilateral research and innovation collaborations.

*Comparative notes on policy measures*

As can be seen in Figure 1, between 2000 and 2009 the Netherlands saw substantial growth in the total number of enrolled international students in comparison with many other competitor countries. Presumably, this growth is due in part to the large growth in English-taught degree programmes that were developed in this decade. However, when we compare the proportion of international students relative to the total higher education student population, the Netherlands is still lagging behind most of its main competitor countries, including Switzerland and Germany, whose governments have sustained a more focused and longer-term policy.

*Figure 1: The total number of incoming international students, per country, per year.*

| | Australia | Canada | France | Germany | Netherlands | Switzerland | UK | USA |
|---|---|---|---|---|---|---|---|---|
| 2009 | 257,637 | 190,315 | 249,143 | 256,719 | 44,409 | 49,407 | 363,363 | 66,0581 |
| 2008 | 230,635 | 185,399 | 243,436 | 245,522 | 40,795 | 45,583 | 335,870 | 62,4474 |
| 2007 | 211,526 | 132,246 | 246,612 | 258,513 | 37,815 | 41,058 | 351,470 | 59,5874 |
| 2006 | 184,710 | 148,164 | 247,510 | 261,363 | 36,427 | 39,415 | 330,078 | 58,4817 |
| 2005 | 177,034 | 75,249 | 236,518 | 259,797 | 31,584 | 36,827 | 318,399 | 59,0167 |
| 2004 | 166,955 | 132,982 | 237,587 | 260,314 | 21,259 | 35,705 | 300,056 | 57,2509 |
| 2003 | 188,160 | | 221,567 | 240,619 | 20,531 | 32,847 | 255,233 | 58,6316 |
| 2000 | 105,764 | 94,401 | 137,085 | 187,033 | 14,012 | 26,003 | 222,936 | 47,5169 |
| growth 2000-2009 | 144% | 102% | 82% | 37% | 217% | 90% | 63% | 39% |
| Student population 2009 | 1,199,845 | 1,445,172 | 2,172,855 | 2,438,600 | 618,502 | 233,488 | 2,415,217 | 1,910,2814 |
| % int. Students 2009 | 21% | 13% | 11% | 11% | 7% | 21% | 15% | 3% |

Notes:
Data for 2001 and 2002 are unavailable
Data for Singapore, Malaysia and China are unavailable
Sources: OECD & UNESCO

The priority recruitment countries of the Dutch government are also targeted actively by many other recruiting countries, some of which are the world's most established international student destinations. How does the Netherlands stand out in terms of policy measures to attract international students?

Compared with many countries studied in this report, the Netherlands has high student visa costs, relatively strict student immigration regulations, and high tuition fees for non-EU students, with limited scholarship opportunities. What is also apparent is that some competitor recruiting countries (such as Germany) make more government funding available to support the development of strategic international higher education collaborations, which include the establishment of long-term opportunities in international student mobility and exchange. The German government in particular continues to make heavy investments in internationalising higher education, despite overall budget cuts.

These factors suggest that the Dutch competitive position in the international student recruitment market, compared with that of its direct competitors (i.e. Australia and the European and North American countries studied in this report), is not among the strongest. With new countries entering the recruitment market and the Dutch

government's goals with respect to internationalisation, it is vital to the Dutch economy and higher education and research sectors to improve the Dutch competitive position.

In the Netherlands, a large majority (76%) of international full-degree students are currently enrolled in bachelor's programmes. This is a restricted international group, largely consisting of German students. Since international student markets are volatile, this high dependency on students from one particular country can be risky. There appears to be scope for Dutch institutions to attract more international students at bachelor's level since not all of their bachelor's programmes are offered in English.

With over half of all Dutch master's degree programmes being offered in English, there is also scope in the Netherlands to attract more international master's students. However, the Netherlands faces strong competition from many other countries in the postgraduate student market. In several countries, such as France, Germany and Canada, tuition fees for postgraduate research students are low or non-existent. Some, such as Germany and China, offer a large number of scholarships to attract master's and doctoral students from abroad. Tuition fee levels and the availability of scholarships for postgraduate students are likely to become increasingly important in international students' choices of destination countries.

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