

How is COVID-19 affecting international students' plans to study in the Netherlands?

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Contents

Main findings and considerations	3
Introduction	4
A. Incoming degree mobility in higher education in 2019-2020	5
International students from Neso countries	5
Mobility in 2020-2021	6
B. Results of the survey ‘Has COVID-19 affected your study plans?’	7
What were their plans?.....	7
Destination countries.....	7
Will they come to the Netherlands?	8
Uncertainties	8
Need for information	9
Differences between countries	9
Changing plans?	9
C. Neso country-specific information	11
A continued interest in studying in the Netherlands, with some exceptions.....	11
The balance between online and offline education	12
D. Conclusion	13

How is COVID-19 affecting international students' plans to study in the Netherlands?

Main findings and considerations

Based on incoming degree student mobility statistics 2019/2020, a survey among prospective students in April/May 2020 and information collected by Nuffic Neso offices.

1. In 2019/2020, 12,3% of all enrolled students in the Netherlands is an international student. **From these students** over 72% is from an EEA country and **over 27% is from a non-EEA country**. Of all international students 16% represents a Neso country.
2. A total of 941 prospective students from Neso countries (hence non-EEA) participated in this survey. **The majority (80%) is still interested in studying in the Netherlands**. Of all respondents 67% hoped to start, as planned, in September 2020.
3. **Prospective students indicate a great number of uncertainties**. The ones most frequently mentioned are travel restrictions and visa procedures, finances and scholarship possibilities.
4. When asked about their preference at this moment, **38% of the prospective students indicated they would prefer on-campus education**, starting in September 2020. Less than 10% indicated a preference for starting with online education at a Dutch institute this coming academic year. This may imply that preference is given to physical participation in an international classroom and everything else that comes with the experience of studying abroad. **Most of the participants (44%) prefer to change their plans, for example by deferring for a year or starting in the first subsequent period**.
5. **Differences between countries can be seen**, likely due to differences in the COVID-19 situation, scholarship possibilities, exchange rate fluctuations, travel restrictions or worries about access to Dutch healthcare facilities.

Introduction

Considering that many countries are in the midst of the global COVID-19 crisis, it is safe to say that the internationalisation of higher education will be profoundly impacted by it. Travel restrictions and uncertainties will hamper both incoming and outgoing mobility of students and university staff worldwide. A significant drop in incoming student mobility in Dutch higher education is to be expected in the coming academic year. However, much is still unknown and many questions remain unanswered. With this study, we aim to find answers to some of these questions and gain more insight. We hope to contribute to an informed response by Dutch higher education institutions and other stakeholders in the sector by sharing the information we have.

This report focuses exclusively on incoming international students, although COVID-19 may be expected to have an effect on outgoing mobility as well. Nuffic will be conducting another assessment that will focus on the effects of COVID-19 on the theme of outgoing mobility of Dutch students. This analysis is threefold and is based on A) incoming degree mobility statistics 2019-2020; B) results from a survey sent to prospect students in the ten countries with a Netherlands Education Support Office (Neso) and C) country-specific information on each of the Neso countries. We conducted this survey to gauge the effect of COVID-19 on non-EU/EEA students' plans to study in the Netherlands and gain a better insight into the effects of the pandemic on the (near) and more distant future.

In the sections below you will find:

- a) the latest statistics on incoming degree mobility higher education in 2019-2020;
- b) results of the survey "Has COVID-19 affected your study plans?";
- c) followed by Neso country-specific information;
- d) and our conclusions.

Nuffic's role

Nuffic is the Dutch organisation for internationalisation in education, from primary and secondary education to vocational and higher education and research. Nuffic supports educational institutions in their internationalisation activities and in teaching international students.

We have **Netherlands Education Support Offices**

(Neso) in ten countries: Brazil, China, India, Indonesia, Mexico, Russia, South Africa, South Korea, Turkey and Vietnam.

These countries are of strategic importance to the Dutch higher education sector, in part because most international students from outside the European Union Higher Education area originate from these countries. (approximately 57%).

Together with Dutch higher education institutions, we position Dutch higher education abroad and provide prospective international students with reliable information about studying in the Netherlands.

"I really need to know which decisions will be made by the Netherlands about opening their border. Another thing is studying online is very difficult for freshmen like the international students....."

A. Incoming degree mobility in higher education in 2019-2020

In this academic year, 94,236 international students are studying a full-time degree programme in publicly financed higher education institutions in the Netherlands. International degree students are students with prior education outside the Netherlands and a non-Dutch nationality. They make up 12.3% of all students enrolled at Dutch higher education institutions in the Netherlands. The majority of international students (about 66%) is enrolled at a research university. About 34% study at a university of applied sciences.

Between 2006 en 2019 the number of international degree students in bachelor and master programmes has gradually increased. The total number of international degree students is highest for bachelors programmes at research universities. Masters programmes at universities of applied sciences have the lowest absolute number of international degree students.

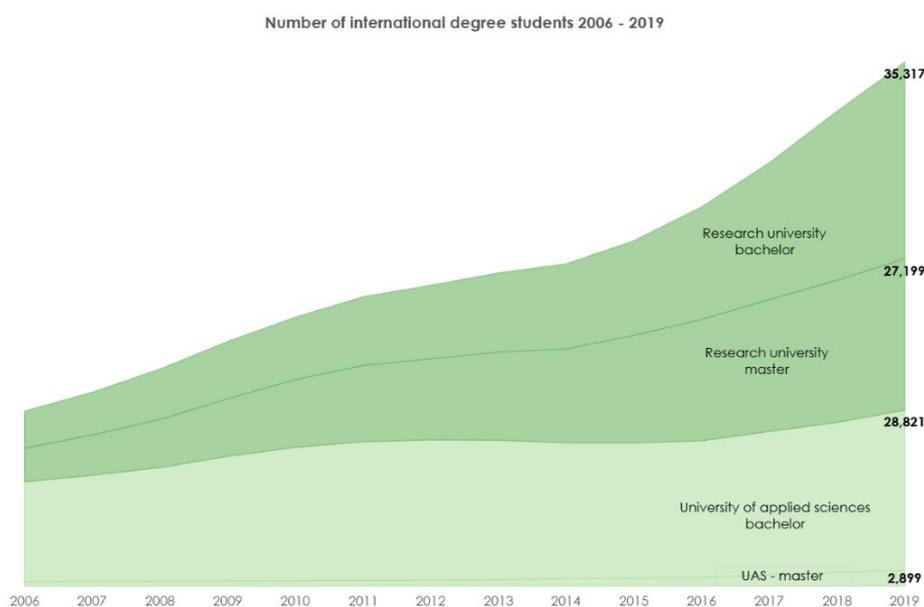


Illustration: number of international degree students between 2006-2019

International students from Neso countries

In 2019/2020 12.3% of all enrolled students in the Netherlands is an international student. From these students, over 72% (68,087) is from an EEA country and over 27% (25,850) is from a non-EEA country. From a very small number of students their country of origin is unknown. Approximately 16% (14,821) of the total number of international degree students in the country are representing a Neso country. Roughly half of them were new enrolments (i.e. students who enrolled in a study programme for the first time in September 2019). This is partly due to the fact that the majority of new enrolments from Neso countries register for master's programmes. The majority of students from Neso countries, 73%, study at a research university. However, figures can differ strongly per country, as is shown in the figure below.

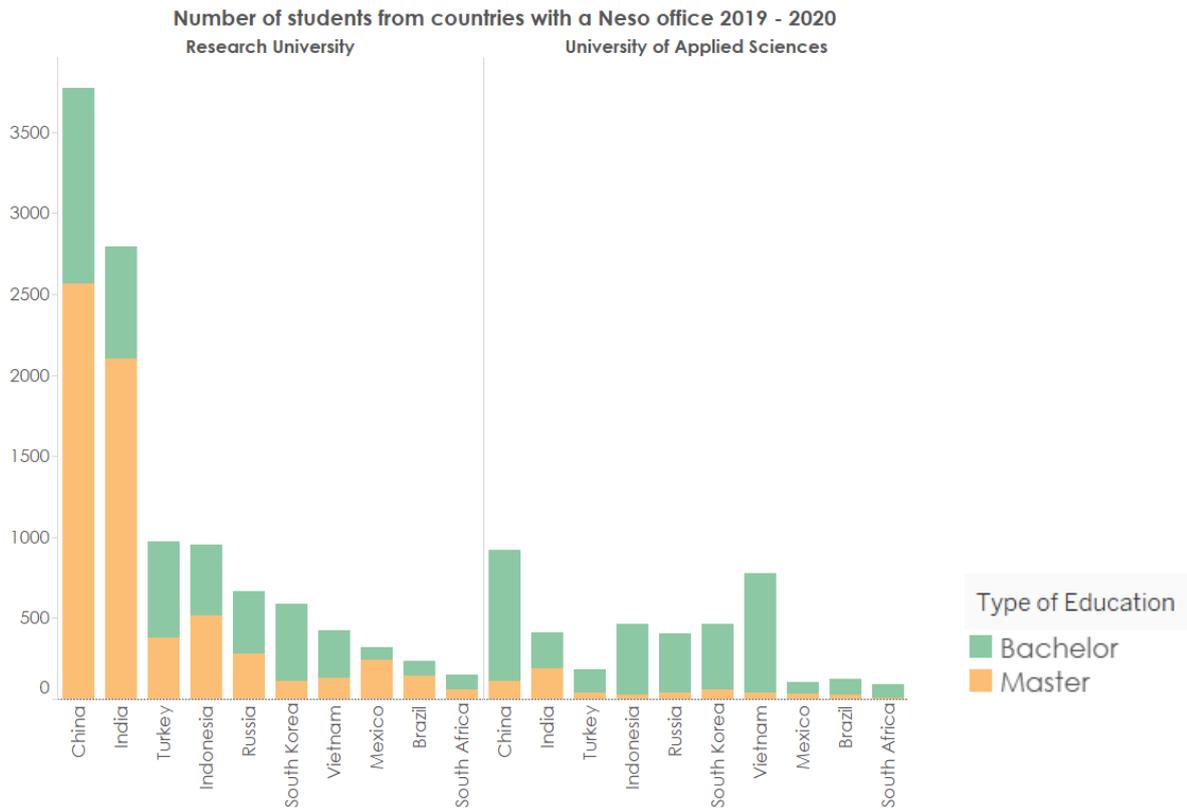


Illustration: Number of degree students from countries with a Neso office in 2019 - 2020, per type of institution and type of education.

Mobility in 2020-2021

Over the past few years, the share of international students in Dutch higher education has slightly increased each year, from 5.5% in 2006 - 2007 to 12.3% this year. However, with COVID-19 affecting many countries in the world as well as student mobility, it is uncertain whether this trend will continue into the 2020-2021 academic year.

B. Results of the survey 'Has COVID-19 affected your study plans?'

The main purpose of this survey was to find out whether COVID-19 had affected the study plans of prospect students in the Neso countries. In light of rapid developments and continuous changes to the current situation the information provided below is intended as a snapshot in time, of the situation at the very end of April/beginning of May 2020. We therefore chose to conduct a brief survey that consisted of thirteen questions that ran from 24 April until 6 May. It was distributed to prospect students by the Neso offices through a variety of channels, including social media. In total, 941 prospect students in ten countries with a Neso office participated in the survey.

What were their plans?

The majority (67%) of prospect students who participated in this survey were planning to start their studies in the Netherlands in September 2020. This was before the COVID-19 pandemic began. Most of them were planning to pursue a master's degree (69%). The other 31% of respondents intended to pursue a bachelor's degrees, a PhD and a summer course or a short course.

Destination countries

The survey was distributed through the Neso offices. Therefore, it is no surprise that about 80% of respondents indicated that they were leaning towards the Netherlands as their destination for studying abroad. Nonetheless, a quarter (26% of respondents) also indicated that they might very well decide to pursue their studies in a country other than the Netherlands. Other countries that were mentioned were mainly EU-countries, with Germany, Belgium and Sweden as leading preferences. The most popular non-EU countries mentioned were Australia, Canada and the United States. The majority of respondents indicated that they had already applied to their selected Dutch higher education institution(s). About 56% had already received an admission letter, while 32% had not submitted an application yet and 12% were still awaiting the decision on their application.

Is it likely for you to pursue your studies in the Netherlands?

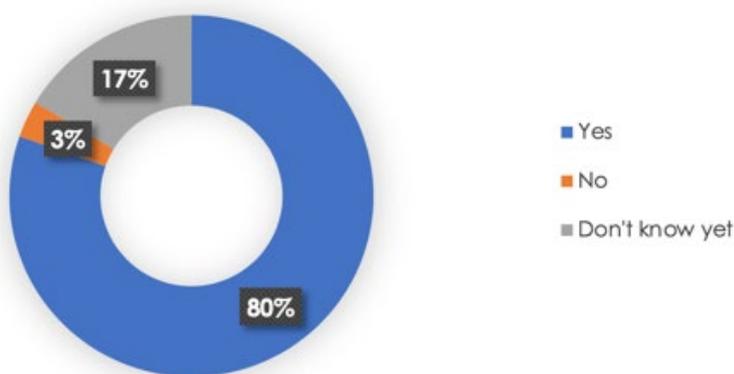


Illustration: Question 4 – Is it likely for you to pursue your studies in the Netherlands?

Will they come to the Netherlands?

While the majority of prospect students hope to come to the Netherlands, we have asked them whether they felt COVID-19 constituted a deterrent. A significant proportion of the respondents (40%) is not deterred from studying in the Netherlands, but 24% think they will have to give up on coming here and almost 36% are not sure yet. This shows that, while there are many uncertainties that may affect their plans, there is still a substantial willingness to come to the Netherlands.

Uncertainties

When asked about the main uncertainties they are currently facing, prospect students indicate that the main uncertainties revolve around travel restrictions, the availability of scholarships, financial constraints and visa procedures. Other uncertainties centre around admission conditions (for example, getting their national exam results in time, being able to pass a language test, etc.) and the mode of instruction (online, on campus or blended). This is important, as the main share of the respondents is planning to start their studies in September 2020. Issues around personal health conditions and access to the Dutch healthcare system are mentioned least, although prospect students (and their parents too) do indicate these as uncertainties.

“Are you planning to start classroom education this fall or online, if it is online till when would it be? And would you reduce the tuition fees?”

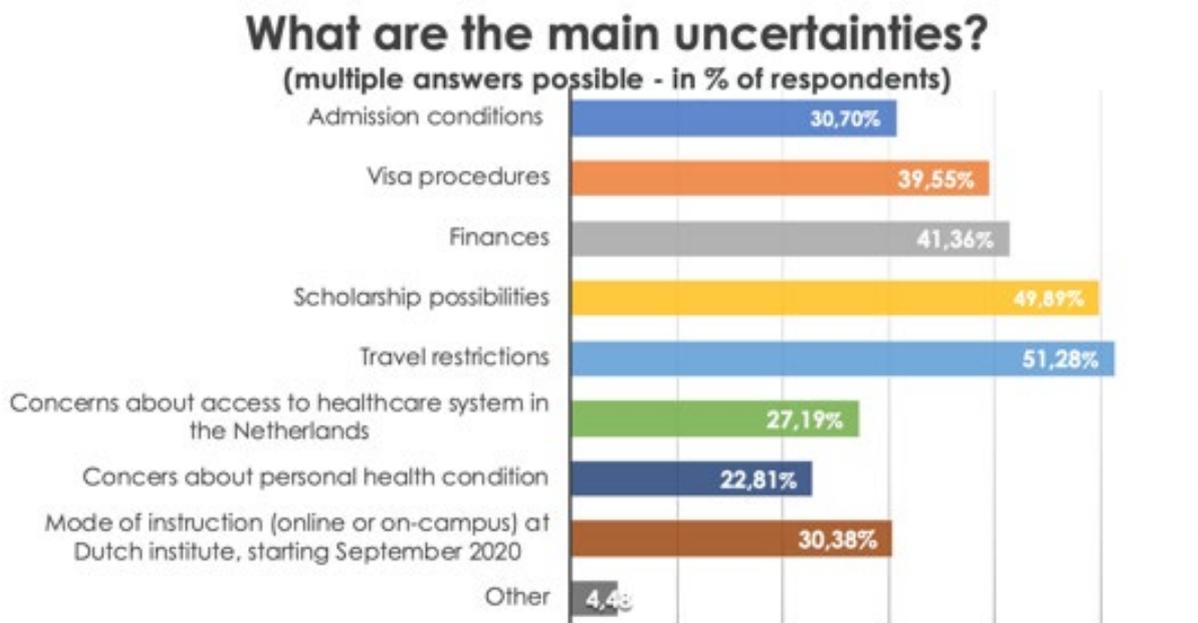


Illustration: Question 11 - What are the main uncertainties?

Need for information

The presence of doubt and uncertainty among prospect students is underlined by the fact that approximately 20% of respondents wrote additional questions in the open response field, for 187 questions in total. These questions show a great need for clear and transparent information, regarding for example: postponement of admission conditions, visa deadlines and the start of the academic year, whether tuition fees will be lowered, if education is offered online and whether scholarship opportunities or student housing will be impacted by this crisis.

Differences between countries

Moreover, differences can be seen between the ten Neso countries. Prospect students in Indonesia, Mexico and Brazil are facing a postponement in the possibility to apply for governmental scholarship programmes, whereas Chinese and South Korean prospect students chiefly worry about access to Dutch healthcare facilities. This might be due to the fact that China and South Korea were among the first to suffer a substantial outbreak of COVID-19 and prospect students and parents from these countries expect a high level of government provided health measures and security. The largest Indonesian scholarship programme, LPDP, has advised students to postpone the start of their study programme. (A separate briefing on LPDP scholarship programme is available from Neso Indonesia.) The main scholarship provider in Mexico, Conacyt, has postponed the deadline and the publication of the results of their scholarships selection process to the second half of August 2020, so even if a student is selected as a scholarship awardee, he/she will not be able to start a programme in September.

“How will the coronavirus crisis impact on my scholarship?”

In addition, the exchange rate of the national currency of Mexico has dropped significantly versus the Euro (about 25%) sharply increasing the cost of studying in the Netherlands. Prospect students in Brazil, Turkey, Russia (which were already affected earlier by a combination of sanctions and very low oil prices) and Indonesia are dealing with the same problem. Scholarships granted in local currencies may also no longer be sufficient to cover the full tuition fee or living costs.

Russian, Indian and South African prospect students are substantially more worried about travel restrictions and China is the only country where the greatest cause of insecurity is the mode of instruction (online or on-campus classes), though this is a relevant concern in other countries as well. In the country-specific information in section C. you will find more background information about the differences between countries.

Changing plans?

Now that coronavirus measures have been put in place globally and the world looks completely different from when most of these prospect students probably started planning their study abroad, do they still want to proceed with their plans to obtain a degree at a Dutch higher education institution?

What do you prefer most at the moment? (in % of respondents)

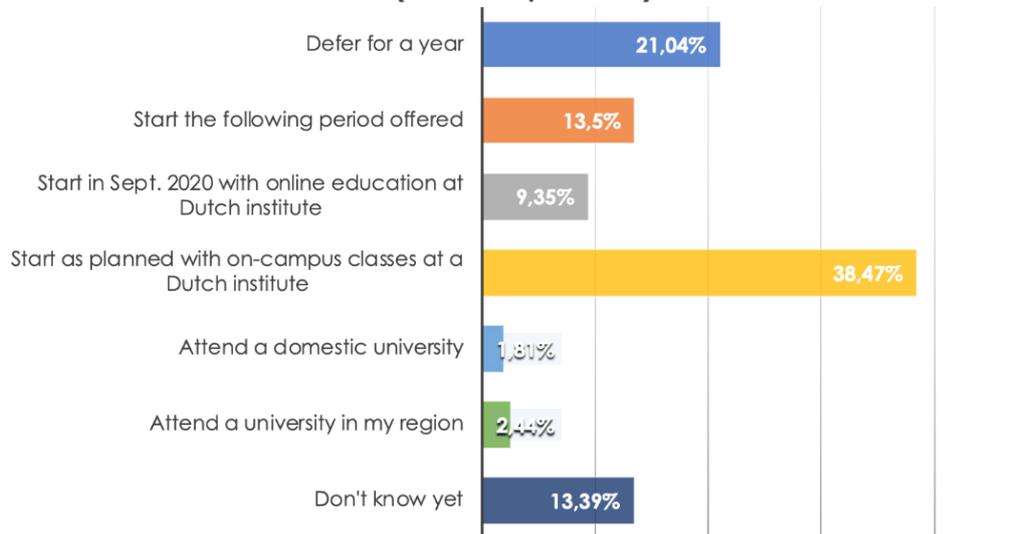


Illustration: Question 10 - What do you prefer most at this moment?

When asked about their current preference, 38% of the respondents state they would like to start their studies as planned at a Dutch institute with on-campus classes. Only a small minority (4%) would rather attend an institution in their home country. However, a rather large group (about 44% in total) would prefer to change their initial plan, for example by a. deferring their stay for a year (21%), b. starting in the first subsequent period (14%), or c. starting with online classes (9%). Another 14% didn't know yet what they would prefer most. This also shows how uncertain things are for many prospect students and that decisions about to go or not to go are still to be taken in the near future. This underlines the importance of providing them soon with the information they need, for example what they can expect when coming to the Netherlands.

C. Neso country-specific information

At the end of April, in parallel with the survey, all ten Neso offices collected country-specific information on the impact of COVID-19 on the internationalisation of Dutch higher education. The information constitutes a reflection on the situation in these countries. Neso offices have quick access to relevant information, including government reports, media publications and other relevant surveys. Many contributions also included individual or more detailed examples that help to clarify the bigger picture.

A continued interest in studying in the Netherlands, with some exceptions

In most Neso countries, interest in studying in the Netherlands there does not yet appear to have dropped significantly. "Postponement is not a strong narrative" reports Neso South Africa. The interest is more or less the same (Neso Mexico and Indonesia), is only "a bit smaller" (Neso Brazil) or has "slightly decreased" (Neso Turkey). The students who intend to go to the Netherlands, especially those who plan to rely on their own funding and/or partial scholarships from Dutch higher education institutions, are optimistic about continuing their studies this year, amid the outbreak and the lockdown policy in the Netherlands.

Continued interest in studying in the Netherlands can also be observed at similar or higher levels of applications for scholarship funding in these countries, such as the Orange Tulip Scholarship (OTS). However, the continued interest in studying in the Netherlands is conditional upon a number of concerns, foremost of which are financial constraints, travel restrictions and the question of whether studying in the Netherlands will offer sufficient on-campus and offline education, instead of completely moving online, which is seen as less attractive.

Number of international students from countries with a Neso office 2006 - 2019

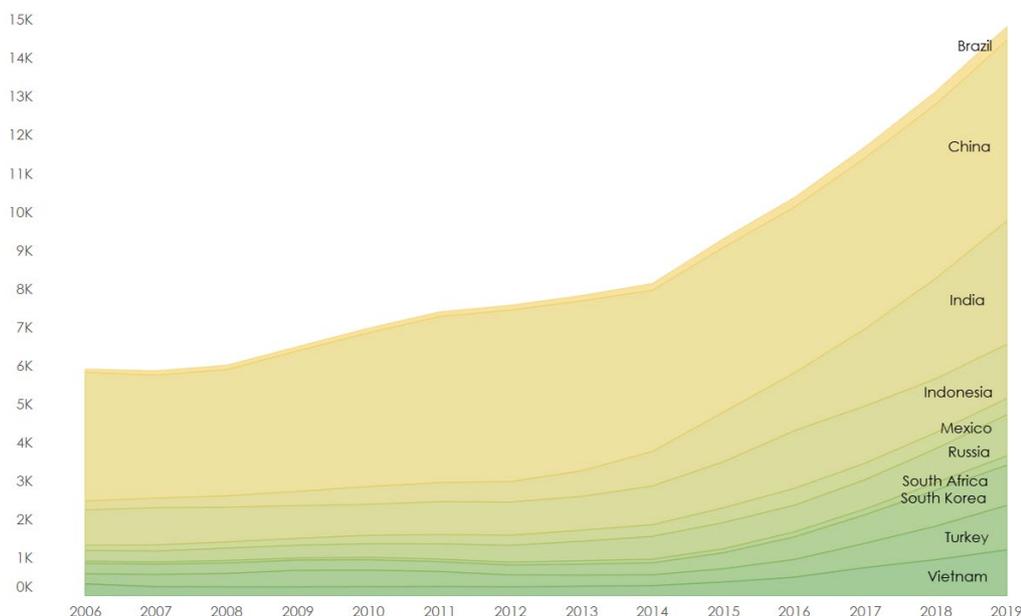


Illustration: Number of international degree students from countries with a Neso office from 2006 to 2019. The number of international students from Neso-countries has increased from 5,907 in 2006 to 14,821 in 2019. An increase of students is visible in every single Neso country.

The main exceptions indicating less interest into studying in the Netherlands are China, South Korea, and to a lesser extent, Vietnam. Neso China has reported a decreased level of interest since the beginning of the year, most likely because of the COVID-19 situation. The number of OTS applications in China decreased from 532 in 2019 to 320 in 2020, and the amount of student counselling by the Neso office also has decreased. It is important to add that Chinese prospect students usually prefer to call and visit the office for the counselling. Due to the current situation, with employees working from home, student counselling was only possible through email and social media channels. That might have caused a lower number of contacts as well.

Neso South Korea received almost no requests for student counselling in March and April when the country was in the peak of the outbreak of COVID-19.

In Vietnam, education agents are reporting a 50-70% drop in application processes for studying overseas. This is corroborated by data from the Neso office, which also received fewer emails and calls from prospect students. However, the number of OTS applications in Vietnam decreased only slightly.

Overall, the information collected by Neso offices supports the findings from the survey among prospect students. As said, the situation is very dynamic and these findings have to be read with care.

***“Will non-EU students get visa approval for the September 2020 intake?
And will non-EU students be quarantined for 14 days after arrival?”***

The balance between online and offline education

Several Neso offices report that interest in coming to the Netherlands will also depend on whether the educational programme will be offered as usual or will instead be offered online. For an international student, the experience of living in the Dutch society, including travel and leisure activities, is on the main reasons of studying in the Netherlands.

Furthermore, prospect students might prefer not to receive education online, because the quality and reputation of online education is not yet as good as offline education and prospect students are looking forward to an on-campus and offline experience while living in the Netherlands. Moreover, in Turkey there are doubts about the official recognition of online education. In the same vein, prospect students in different countries are asking whether tuition fees will decrease if education is offered online.

D. Conclusion

Based on this analysis, the majority still want to study in the Netherlands and hope to start in September 2020. However, their practical concerns will need to be addressed quickly to turn their aspiration into reality. Clarity on when and how the new academic year will start and on any specific requirements or conditions that will apply because of lockdowns and preventive measures will be crucial.

The Dutch government has recently taken the first tentative steps in relaxing its COVID-19 containment measures. However, face-to-face on-campus education is not yet possible at the moment of writing and Dutch higher education institutions are still teaching their courses online. Official government line *at this moment* is that from 15 June it will be looked into what might be possible in the Dutch higher education sector. As the situation further evolves and the beginning of the academic year comes closer, follow up assessment of the situation will be necessary. This is scheduled for June or July.

Finally, there are other parties that, like Nuffic, have conducted studies and shared insights regarding the impact of COVID-19 on global student mobility. Our sister organization in Germany, DAAD, has put together this comprehensive overview: www.daad.de/covid-studies .

If you have any questions after reading this analysis, please do not hesitate to contact us at studyinholland@nuffic.nl.



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