

## SIZING UP THE COMPETITION:

### THE FUTURE OF INTERNATIONAL POSTSECONDARY STUDENT ENROLLMENT IN THE UNITED STATES

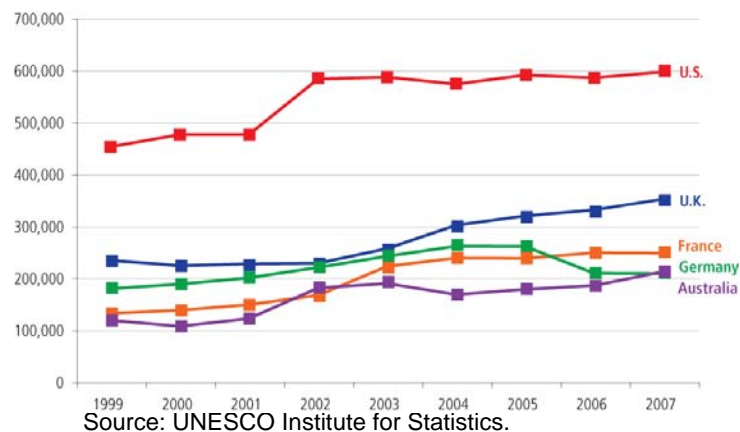
In 2007, there were an estimated 2.8 million internationally mobile students, up from 1.8 million in 1999.<sup>1</sup> Those numbers are expected to continue to increase. The United States enrolled the largest number of these students (595,874), which represented 20 percent of the internationally mobile student population.<sup>2</sup>

Historically, the United States has been a magnet for international students, whose presence affirms the quality and attractiveness of U.S. higher education; who represent a significant proportion of graduate students in math, science, and engineering; and who contribute to the internationalization of U.S. campuses. Graduates returning to their home country bring with them firsthand knowledge of U.S. people and culture and, frequently, ties to friends and colleagues in the United States.

However, the past does not necessarily predict the future. After the events of September 11, 2001, U.S. enrollments of international students briefly dipped, as visa restrictions tightened and perceptions grew in some countries that America no longer welcomed international students. At the same time, for the past decade, other countries have been intensifying their efforts to bring international students to their institutions. As a result, the U.S. share of the growing international student market fell from 28 percent to 20 percent between 2000 and 2006.<sup>3</sup>

To help postsecondary institutions understand and adjust to the new competitive landscape for international students, this issue brief examines the trends in enrollment of internationally mobile students in the top five destination countries—the United States, the United Kingdom, Germany, France, and Australia (see **Chart 1**) and summarizes the

**Chart 1: International Postsecondary Student Enrollment in Top Five Destination Countries: 1999–2007**



<sup>1</sup> UNESCO. (2009). *Global Education Digest*. Quebec, Canada: UNESCO-UIS.

<sup>2</sup> Ibid. Because of differing data collection methodologies and definitions of the *international student* across countries, there are often discrepancies between international student enrollment data reported by different organizations. (See the appendix for information on *international student* definitions and enrollment figures from other national agencies.) The authors of this issue brief have chosen to use data from UNESCO, as we believe it yields the best comparability across countries. An alternative source of data worth considering is Project Atlas ([www.atlas.iienetwork.org](http://www.atlas.iienetwork.org)).

<sup>3</sup> Organisation for Economic Co-operation and Development (OECD). (2002–2008). *Education at a Glance*.

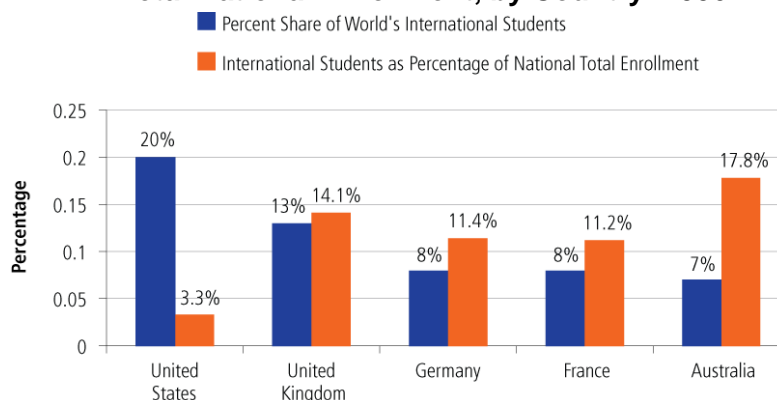
recruiting efforts of these nations. It also highlights relatively recent entrants into the competition for international students, including Singapore and the Gulf States, and suggests potential new patterns of mobility. The landscape of international student enrollments is shifting, and the preeminence of the United States as a destination for these students could be at risk.

## I. National Recruitment Strategies

Governments and higher education institutions support the recruitment and enrollment of international students for a variety of reasons. For some countries, income generation has been an important motive. Some benefits come in the form of cultural diplomacy—that is, improved perceptions and attitudes toward their culture and people. International students are sources of innovation and productivity. Institutions gain access to the best and brightest graduate students from around the world, and their students are exposed to greater diversity of experiences, opinions, and backgrounds. As **Chart 2** shows, the United States enrolled one-fifth of all international students in 2006, but these students constitute a small proportion of total U.S. enrollment compared to other countries.

The global marketplace for internationally mobile students has led nations to compete with one another by developing a variety of policies and strategies to attract these students. This section highlights the efforts made by the top five destination countries, in order of their share of the international student population.

**Chart 2: Share of all International Postsecondary Students and Proportion of Total National Enrollment, by Country: 2006**



Source: OECD (2008). *Education at a Glance*.

## 1. United States

### **Enrollment Trends**

The United States continues to be the world's leading higher education destination. Nearly 600,000 international students studied in the United States in 2006–07,<sup>4</sup> and the Department of Commerce estimates that international education contributed \$15.5 billion to the U.S. economy during that academic year.<sup>5</sup> The vast majority of these students come from Asia, although neighboring countries Mexico and Canada continue to be strong sources as well. Since 2002, India has sent the highest number of students to the United States—94,563 students in 2008, a 13 percent increase from 2007. China sends the second highest number of students (81,127 in 2008), followed by South Korea and Japan.<sup>6</sup>

### **Recruitment Efforts**

In the United States, the majority of recruitment efforts are conducted by individual institutions. Some colleges and universities partner with other institutions to promote higher education in their state or region. Study Philadelphia, for example, is the result of the Campus Philly partnership among 20 institutions, and Study Wisconsin is a marketing campaign conducted by 36 colleges and universities in that state.<sup>7</sup>

At the national level, the U.S. Department of State's Bureau of Educational and Cultural Affairs sponsors EducationUSA, a network of professional educational advisers and education information centers that promotes U.S. higher education worldwide and offers international students information on the application process, admissions requirements, potential scholarship funding, visas, and everyday living in the United States. EducationUSA maintains a web site, produces brochures in six languages, and operates 450 advising centers around the world. Additionally, the Bureau funds overseas regional and national educational advising coordinators to organize conferences and adviser training and to serve as a resource on national and regional trends. The Bureau also provides U.S. institutions with opportunities to host overseas advisers and to visit advising centers around the world.<sup>8</sup>

### **Scholarships**

The U.S. government offers a range of scholarship opportunities. The Fulbright Foreign Student Program, sponsored by the U.S. Department of State and funded at \$95 million per year, awards more than 3,000 scholarships annually. The Fulbright program is merit-based and targets graduate students. The awards cover support such as tuition, living allowances, travel, and health coverage. Other programs include the Department of State's UGRAD Program and Community College Initiative, and the U.S. Agency for International Development's Collaborative Research Support Program and Cooperative Association of States for Scholarships Program. Awards are made based on either merit

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<sup>4</sup> UNESCO. (2009). *Global Education Digest*.

<sup>5</sup> Government Accountability Office. (2009). *Higher Education: Approaches to Attract and Fund International Students in the United States and Abroad*. GAO-09-379.

<sup>6</sup> Bhandari, R. & Chow, P. (2008). *Open Doors 2008: Report on International Educational Exchange*. New York: Institute of International Education.

<sup>7</sup> For more information on city, state, and regional recruiting consortia, visit the Study USA Department of Commerce web site at [www.buyusa.gov/studyusa/97.html](http://www.buyusa.gov/studyusa/97.html).

<sup>8</sup> For more information on the Bureau's regional and country educational advising coordinators, visit the EducationUSA web site at [www.educationusa.state.gov](http://www.educationusa.state.gov).

or need, depending on the program.<sup>9</sup> It should be noted, however, that many U.S. institutions provide scholarships for international students as research or teaching assistantships. Despite such assistance, 62 percent of international students in the United States list personal or family funds as their primary source of funding for education.<sup>10</sup>

### **Visa Policies**

In response to the events of September 11, 2001, the federal government developed the Student Exchange Visitor Information System (SEVIS) to improve tracking of international students in the United States. In September 2009, a new generation of the system, SEVIS II, was launched in an effort to streamline procedures and create a more user-friendly process. An international student applying to study in the United States will typically pay a SEVIS I-901 fee, which doubled from \$100 to \$200 in fall 2008, and a visa fee of \$131 charged by the Department of State.

Students enrolled in U.S. undergraduate and graduate programs may extend their stay upon completion of their degree for up to 18 months for Optional Practical Training (OPT).<sup>11</sup> Additionally, as of April 2008, the U.S. government allows international students engaged in a STEM-field OPT program to apply for an additional 17-month extension of their F-1 student visa.

## **2. The United Kingdom**

### **Enrollment Trends**

In 2007, the United Kingdom hosted 351,470 international students.<sup>12</sup> International student enrollment has risen during the past decade, although with some slowdown in that growth in recent years. This slowdown may be attributable to the growth of English-language programs in Europe (the number of English-taught programs in Europe has roughly tripled since 2003) and to the limited capacity of some U.K. institutions with high international student enrollments to absorb additional students.<sup>13</sup>

In spite of new, more stringent visa requirements, the Universities and Colleges Admissions Service (UCAS) reported in June 2009 a 12 percent increase in the number of international undergraduate applications from the same time last year. International student enrollment in the United Kingdom may rise once again.

### **Recruitment Efforts**

In 2006, then Prime Minister Tony Blair launched the second in a series of international education initiatives (PMI2), which aimed to “secure the U.K.’s position as a leader in international education and sustain the growth of U.K. international education delivered in the U.K. and overseas.”<sup>14</sup> The targets for 2011 set by the initiative include the recruit-

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<sup>9</sup> Government Accountability Office. *Higher Education*.

<sup>10</sup> Bhandari & Chow. *Open Doors 2008*.

<sup>11</sup> For more information on the OPT program, visit the U.S. Citizenship and Immigration Services web site at [www.uscis.gov/portal/site/uscis](http://www.uscis.gov/portal/site/uscis), click on Press Room, and see the release titled Questions and Answers: Extension of Optional Practical Training Program for Qualified Students, under April 2008.

<sup>12</sup> UNESCO. (2009). *Global Education Digest*.

<sup>13</sup> Wächter, B. & Maiworm, F. (2008). *English-Taught Programmes in European Higher Education. The Picture in 2007*. Bonn: Lemmens.

<sup>14</sup> See the British Council web site, PMI2 Overview, [www.britishcouncil.org/eumd-pmi2-overview.htm](http://www.britishcouncil.org/eumd-pmi2-overview.htm).

ment of an additional 100,000 international students and doubling the number of countries that send more than 10,000 students per year to the United Kingdom. The plan targets 24 countries<sup>15</sup> and focuses on improving the reputation of the U.K. higher education and further education sectors (similar in concept to U.S. community colleges) in the international arena through marketing campaigns and the development of partnerships. The Education UK brand was developed for the PMI2 and uses the slogan “Innovative. Individual. Inspirational.” A network of British Council offices located in more than 100 nations markets the U.K. higher education sector to potential students using this brand and offering information on scholarship opportunities.

### **Scholarships**

The United Kingdom has three major scholarship initiatives for international students; all are for graduate study. The Chevening Scholarships aim to bring future leaders for one year of study during a formative time in their career. The Chevening program offers approximately 1,000 scholarships annually. The Commonwealth Scholarships offer Commonwealth citizens from developing countries funds for travel, tuition, fees, and living expenses for up to three years of graduate study. Approximately 450 students study in the United Kingdom under this program each year. Finally, the Overseas Research Students Award Scheme (ORSAS) meets the difference between the home and overseas level tuition fees for an international graduate student in a research degree program. As of fall 2009, the ORSAS will be discontinued in England and Wales but will continue in a new format for those wishing to study at Scottish universities.

### **Visa Policies**

New visa regulations were implemented in 2009 aiming to provide a simpler and more objective system for international students and crack down on fraudulent colleges. The new policies increase visa application fees from \$164 to \$240<sup>16</sup> (£99 to £145), with other increases in fees for extensions, in-person applications, and dependent applications. The visa application process uses a points-based system that requires students to obtain 40 points: 30 given with proof of acceptance to an approved higher education provider and 10 given with proof of funds to cover course fees and living costs.<sup>17</sup> There are reports that the transition to the new process has led to lengthy delays and inconsistencies.<sup>18</sup> Additionally, the United Kingdom will roll out a new tracking system for international students in the fall of 2009.

## **3. Germany**

### **Enrollment Trends**

Recent trends in Germany’s international student recruitment demonstrate a move toward greater regional recruitment and less emphasis on the global market share.<sup>19</sup> Enrollment from non-European countries has remained steady, while enrollment of

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<sup>15</sup> As reported by the British Council web site: Australia, Bangladesh, Brazil, Canada, China, Ghana, The Gulf (including Saudi Arabia and UAE), Hong Kong, India, Indonesia, Japan, Korea, Malaysia, Mexico, Nigeria, Pakistan, Russia, Singapore, Sri Lanka, Taiwan, Thailand, Turkey, USA, and Vietnam.

<sup>16</sup> Unless otherwise stated, all dollar amounts are in U.S. dollars.

<sup>17</sup> UK Border Agency’s Quick Guide for Students. See [www.ukba.homeoffice.gov.uk/studyingintheuk/quickguideforstudent/adultstudents/applyingforanadultstudentvisa](http://www.ukba.homeoffice.gov.uk/studyingintheuk/quickguideforstudent/adultstudents/applyingforanadultstudentvisa).

<sup>18</sup> Lipsett, A. (2009, 23 February). New Visa Rules ‘Could Damage Higher Education.’ *The Guardian*; and Shepard, J. (2009, 21 July). Tough visa rules deterring overseas students coming to the UK. *The Guardian*.

<sup>19</sup> UNESCO. (2009). *Global Education Digest*.

students from Europe has grown. According to UNESCO data, Germany hosted 206,875 students in 2007, about 8 percent of the total global international student enrollment.<sup>20</sup>

### ***Recruitment Efforts***

The German Academic Exchange Service (DAAD) operates in 64 offices worldwide. DAAD is an intermediary organization between German higher education and government agencies. According to its web site, the service “offers higher education institutions the opportunity to become actively involved in Germany’s foreign cultural, education and research, and development cooperation policies.”<sup>21</sup> The agency works in five areas: scholarships for foreign students to study in Germany; scholarships for Germans to study abroad; the internationalization of German universities; the promotion of German studies and the German language; and educational cooperation with developing countries. DAAD helps institutions recruit international students through information and advertising campaigns, using the “Study in Germany: Land of Ideas” slogan to attract students and managing a “Research in Germany: Land of Ideas” campaign to attract international post-docs and faculty.

DAAD offers a range of programs to promote study of the German language. It offers funding and scholarships for foreign Germanists to study in Germany, works in partnership with universities abroad to promote the establishment of degree courses in German, and offers funding for the creation of centers for German and European studies at universities around the world.

### ***Scholarships***

DAAD administers a variety of scholarship programs to attract international students to Germany. In 2007, the German Academic Exchange Service awarded 26,139 scholarships to international students, amounting to approximately \$140 million (€100 million). These included annual awards as well as funds for short visits, internships, and summer programs.<sup>22</sup>

### ***Visa and Immigration Policies***

Visas costs are relatively low at approximately \$86 (€60). The German government makes it possible for academics and scientists to remain in the country after graduation. Upon completion of a postgraduate degree, highly qualified foreigners are immediately eligible to receive a settlement permit without the approval of the Federal Employment Agency.

## **4. France**

### ***Enrollment Trends***

The French share of international students has remained steady since 2000 at approximately 8 percent. Seven of the top 10 sending countries to France are

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<sup>20</sup> UNESCO data indicate a significant decrease in international student enrollment in Germany after 2005. Prior to 2005, Germany reported international student enrollment based on students’ citizenship status; after 2005, the data were based on the location of the prior education of the student. This accounts for a large portion of the drop in the reported international student enrollments after 2005.

<sup>21</sup> See the DAAD web site, About Us, [www.daad.de/en/index.html](http://www.daad.de/en/index.html).

<sup>22</sup> For an overview of all DAAD scholarship programs, see [www.daad.de/deutschland/foerderung/stipendiendatenbank/00462.en.html](http://www.daad.de/deutschland/foerderung/stipendiendatenbank/00462.en.html).



francophone,<sup>23</sup> and francophone students make up about 32 percent of the total international student population in France. In 2007, UNESCO reported 246,612 international students enrolled in France's colleges and universities.

### **Recruitment Efforts**

When the annual number of international students began decreasing in France in 1994, the government began to think more strategically about promoting the French higher education system. EduFrance was established in 1998 as a national agency to promote French higher education abroad, and was replaced by CampusFrance in 2006. CampusFrance currently has 100 offices in 75 countries.<sup>24</sup> The agency assists international students throughout their student experience, from navigating the application process through the students' returns to their home countries. Additionally, CampusFrance organizes promotional events (education fairs, forums, thematic visits, university tours) throughout the year in cooperation with French higher education institutions.

### **Scholarships**

France offers a number of scholarship programs. In total, the French Ministry of Foreign and European Affairs financed \$142 million (€100 million) for their international student grant program in 2007. The Eiffel grants, for example, provide financing for graduate study in priority areas (science, economics, law, and political science); and the Major merit grants provide financial aid for international undergraduate and graduate students who have a degree from a French high school abroad.<sup>25</sup>

### **Visa Policies**

Recently, the Minister of Foreign Affairs has launched the *Centres pour les Etudes en France* (Centers for Studies in France), which operate in 30 countries under the banner of CampusFrance. These centers act as a one-stop shop for international students applying to French schools. Moreover, changes to the visa system have enhanced the attractiveness of the French system. In 2006, the government enacted a new streamlined procedure for granting visas to international students that also allows students to extend their stay in France for two additional years of work after they complete a master's degree. In June 2009, the visa process changed to allow international students to receive a visa that covers the entire period of their studies in France.

## **5. Australia**

### **Enrollment Trends**

In 2007–08, education services were the third largest export revenue category in Australia, just behind coal and iron ore. International students make up almost 20 percent of total higher education enrollments in the country. In 2007, Australia hosted 211,526 international students, a 15 percent increase from the previous year.

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<sup>23</sup> The top 10 sending countries to France (in rank order) are: Morocco, Algeria, China, Tunisia, Senegal, Germany, Cameroon, Lebanon, Vietnam, and Italy. Campus France. (2008). International Student Mobility: Key Figures.

<sup>24</sup> Siganos, A. (2008, 29 January). *From EduFrance to CampusFrance (1998–2008)*. Speech given at the colloquium on French and francophone foreign cultural action at the Sciences Po Paris. See [www.campusfrance.org/en/b-agence/10ans\\_01.htm](http://www.campusfrance.org/en/b-agence/10ans_01.htm).

<sup>25</sup> For more information on scholarships and grants to study in France, visit the CampusFrance's online database at [www.campusfrance.org/fr/d-catalogue/campusbourse/cfbourse/index.html#](http://www.campusfrance.org/fr/d-catalogue/campusbourse/cfbourse/index.html#).

### **Recruitment Efforts**

As an English-speaking country with a vocational education sector strongly linked to national and regional labor markets, Australia has traditionally been an important destination for students from the Asia-Pacific region. Australia has led “Study in Australia” campaigns with the slogan “Live. Learn. Grow.”<sup>26</sup>

The newest version of this marketing campaign, “Study in Australia 2010,” includes a \$2.8 million drive to support the international education sector. The plan includes a focus on six key markets: China, India, South Korea, Indonesia, Malaysia, and Thailand, although Australia Education International (AEI) officials note that they will continue to reach out to other emerging markets such as Brazil. Regarding this drive, the Minister for Education, Julia Gillard, writes that, “It is underpinned by four key themes: showcasing Australian education and training excellence, positioning Australia in the global market, enhancing the student experience, and supporting the Australian international education sector.”<sup>27</sup>

AEI is the international arm of the Australian government’s Department of Education, Employment and Workplace Relations (DEEWR). AEI has 25 offices in 17 countries that serve both as outreach centers for potential students and as the international student market research center for the government.

### **Scholarships**

AEI advises students on scholarships available to study in Australia. The government-funded Endeavor Awards, for example, are merit-based scholarships for research, study, or professional development in Australia. The program awards approximately 620 scholarships annually, totaling \$30 million. The government also annually provides \$6 million to Australian universities in support of undergraduate student exchange scholarships and initiatives. Additionally, the Australian government offers a number of development assistance scholarships such as \$85 million annually to over 1,000 scholars from developing nations and \$15 million annually for 150 Australian Leadership Awards.

### **Visa and Immigration Policies**

The student visa application charge is higher than in other countries—approximately \$427 (Aus\$540), about 20 percent of which goes to support international education through the DEEWR. Before 2008, international students who wished to work while studying in Australia were required to apply for a separate student work visa. Now, international students are automatically granted permission to work up to 20 hours per week under their student visa.

Many Australian development scholarship programs require that recipients return to their home country after graduation. Other international student graduates are eligible to apply for a “graduate-skilled” visa that will allow them to work in Australia after they complete their studies.

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<sup>26</sup> See the Study in Australia web site at [www.studyinaustralia.gov.au](http://www.studyinaustralia.gov.au).

<sup>27</sup> Australian Education International (AEI) web site. Government drive to raise Australia’s international education profile. See [www.aei.gov.au/AEI/SIA2010.htm](http://www.aei.gov.au/AEI/SIA2010.htm).



Changes to Australia’s immigration policies that tighten restrictions to apply for permanent residency could have significant effects on numbers of students coming into the country from India and China. Although restrictions implemented in December 2008 mainly target vocational students, colleges and universities throughout the higher education sector are concerned, because vocational colleges often serve as feeder schools for higher education courses.<sup>28</sup>

**Table 1: Recruitment Strategies Among Top Five Destination Countries for International Postsecondary Students in 2007**

	<b>National Strategy/ Slogan/Web Site</b>	<b>Recruitment/ Information Centers</b>	<b>Major Annual Scholarship Initiatives (Total Number and Dollars Available)</b>	<b>Visa Fees (in U.S. Dollars)</b>
<b>United States</b>	No slogan. <a href="http://www.educationusa.state.gov">www.educationusa.state.gov</a>	Education USA; 450 advising centers worldwide	Fulbright Foreign Student Program (3,200; \$95 million); Global Undergraduate Exchange Program or UGRAD (450; \$23 million); Community College Initiative (250; \$8.5 million); Collaborative Research Support Program (160; \$10 million)	\$331 visa and SEVIS fees
<b>United Kingdom</b>	Education UK; slogan: “Innovative. Individual. Inspirational.” <a href="http://www.educationuk.org">www.educationuk.org</a>	British Council: offices in 100 countries	Chevening Program (1,885; \$47.8 million); Commonwealth Scholarships (450; \$21.6 million)	\$240 entry/ visa fee
<b>Germany</b>	Study in Germany; slogan: “Land of Ideas.” <a href="http://www.daad.de">www.daad.de</a>	German Academic Exchange Service (DAAD): 64 offices worldwide	German Academic Exchange Service Study Scholarships and Research Grants (26,139; \$140 million)	\$86 entry/ visa fee
<b>France</b>	Slogan: “Choose France.” <a href="http://www.campusfrance.org">www.campusfrance.org</a>	Campus France; 100 offices in 75 countries	Eiffel Excellence Grants (400) Corporate Partnership Grants; \$142 million budget for the international student grant program	\$70 entry/ visa fee, plus \$44 or \$122 for a residence permit
<b>Australia</b>	Study in Australia; slogan: “Live. Learn. Grow.” <a href="http://www.studyinaustralia.gov.au">www.studyinaustralia.gov.au</a>	Australia Education International (AEI): 25 offices in 17 countries	Endeavor Awards (620; \$30 million); Australian Development Scholarships (1,000; \$85 million) Australian Leadership Awards (150; \$15 million)	\$427 entry/ visa fee

<sup>28</sup> Maslen, G. (2009, 19 July). Australia: Has the export education bubble burst? *University World News*; and (2009, 26 July). Australia: International Education at a Crossroads. *University World News*.

## **II. Education Hubs: Regionalization as a Trend in Mobility**

Another trend that is changing the landscape for international student mobility is growing regionalization. Examples of regional hubs are Singapore for Asian students, and the United Arab Emirates (UAE) and Qatar for students from the Middle East.<sup>29</sup> These countries and cities develop strategies to attract foreign institutions but have the added effect of attracting students from the region. Additionally, through the Bologna Process and the development of a “European Higher Education Space,” Europe is seeking to attract students from outside that region. This trend could have different implications for the United States. To the extent that regional hubs are inviting U.S. institutions to offer programs, they represent potential growth areas for the United States. They also could effectively decrease the number of students willing to travel outside their home region for a foreign education when they can obtain it in a neighboring country.

### **1. Asia: Singapore**

In an effort to shift its economic focus to the development of knowledge-based industries in the 1980s, the city-state of Singapore looked to attract foreign higher education institutions and students to its shores. In 1999, Singapore announced its plan to attract at least 10 world-class foreign higher education institutions by 2009 and 150,000 international students by 2015. The Global Schoolhouse strategy, as it is called, has exceeded its goals. By 2007, there were 15 foreign institutions operating niche programs mainly for international students in Singapore.<sup>30</sup> In 2006, Singapore enrolled more than 80,000 foreign students, an 11 percent increase from the previous year. These branch campuses and partnership programs have solidified Singapore as a gateway for students who want a Western education taught in English that also provides access to Chinese language instruction and China’s business market.

### **2. Middle East: Abu Dhabi, Dubai, and Doha**

Over the past decade, the United Arab Emirates (UAE) and Qatar have attracted internationally renowned universities to create higher education hubs for students from the region. As part of a long-term development strategy, these nations have invested vast amounts of money in tertiary education, fully funding institutions from the United States, United Kingdom, Europe, and Australia to set up branch campuses that will attract local and international students. Education City in Doha, University City in Abu Dhabi, and Knowledge Village in Dubai are all models of this strategy. Universities such as Georgetown, Johns Hopkins, The University of Paris, Massachusetts Institute of Technology, and Carnegie Mellon are just a few of the prestigious institutions that have participated in these initiatives. These experiments in public/private/government

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<sup>29</sup> China is also seeking to grow its international student population by expanding the capacity and quality of its domestic institutions and offering a growing amount of scholarship funding for international students. Major discrepancies, however, between international student enrollment data presented by the Ministry of Education in China and UNESCO make comparisons with other host countries dubious.

<sup>30</sup> Gribble, C. & McBurnie, G. (2007). Problems within Singapore’s Global Schoolhouse. *International Higher Education*, no. 48.

partnerships are in the relatively early stages.<sup>31</sup> The idea of a high-quality foreign education at home, or close to home, is proving to be an attractive option for students in the region.

**Table 2: Foreign Branch Campuses Established in Abu Dhabi, Dubai, and Doha**

### 3. Europe: The Bologna Process

The Bologna Process, involving 46 nations, seeks to create an integrated European Higher Education Area (EHEA) through harmonization of degree structures, enhancement of credit transfer, and increased European student mobility. Europe also aims to increase its attractiveness to students from outside the region through the Bologna Process. First, the synchronization of degree structures across countries creates greater access and flexibility among European degree programs for non-European students. The creation of a system of comparable degrees based on a two-degree cycle (undergraduate of at least three years, and master's and/or doctoral degrees), establishes a common frame of reference for programs across those 46 countries, strengthening degree recognition and mobility. Second, the removal of structural barriers to collaboration with institutions outside Europe creates a favorable environment for joint and dual degrees and other forms of transnational education. Third, European institutions are increasingly offering programs in English, enhancing their attractiveness to international students. Finally, an outgrowth of the EHEA has been creation of the European Research Area (ERA).<sup>32</sup> The ERA seeks to encourage industry to increase its investment in research and to attract the best talent to research careers in Europe. This regional movement toward cooperation and cohesion will strengthen the entire continental system. The Bologna Process serves not only to spotlight the EHEA on the world stage, but also to fortify its position as a dynamic

<b>Abu Dhabi, United Arab Emirates: University City</b>
Insead (France)
Johns Hopkins University
Massachusetts Institute of Technology (with Masdar Institute of Science and Technology)
New York University
Université Paris Sorbonne (France)

<b>Dubai, United Arab Emirates: Knowledge Village</b>
Boston University
Harvard Medical International
Michigan State University
Middlesex University (UK)
Rochester Institute of Technology
Saint-Petersburg State University of Engineering and Economics (Russia)
University of Wollongong (Australia)

<b>Doha, Qatar: Education City</b>
Carnegie Mellon University
Georgetown University
Northwestern University
Texas A&M University
Virginia Commonwealth University
Weill Cornell Medical College

<sup>31</sup> For more information on U.S. branch campuses abroad, see Green, M., Kinser, K., & Eckel, P. (2008). *On the Ground Overseas: U.S. Degree Programs and Branch Campuses Abroad*. Washington, DC: American Council on Education; and Green, M. et al. (2007). *Venturing Abroad: Delivering U.S. Degrees Through Overseas Branch Campuses and Programs*. Washington, DC: American Council on Education.

<sup>32</sup> For more information on the European Research Area, see the web site at [http://ec.europa.eu/research/era/index\\_en.html](http://ec.europa.eu/research/era/index_en.html).

knowledge center that attracts the best and the brightest students to a system defined by movement and flexibility.

### **III. Conclusion**

The demand for higher education is increasing globally, and research suggests that the number of internationally mobile students will increase.<sup>33</sup> Postsecondary students will be “pushed” to seek higher education outside their home countries if the domestic capacity is insufficient, or the quality of a foreign education is superior to that of their home country, and “pulled” by the attractiveness and recruiting efforts of the host countries. If the overall size of the pie increases, that is good news for all receiving countries, even if each country’s share does not grow. The data reviewed in this paper draw a picture of a changing landscape for international student mobility, one in which the continued preeminence of the United States is not a certainty.

With international students representing only 3 percent of total U.S. enrollment, there is untapped capacity for increasing their number and indeed, many domestic institutions are seeking to increase their international student population. Additionally, because 19 percent of all international students in the United States enroll in only 25 institutions, and more than half are enrolled in just over 150 institutions, there are many institutions among the more than 4,000 accredited degree-granting colleges and universities that could help meet additional demand for a U.S. education.<sup>34</sup> Some states, however, are experiencing capacity issues with respect to domestic students and, therefore, boosting international enrollment is not seen as a viable option in the current economic climate. Other states do not see international students in direct competition with U.S. students for enrollment, especially in graduate programs in STEM fields where there are shortages of U.S. candidates.

The extent to which international education enrollments grow in the United States will depend on a number of factors:

#### **1. Demand from International Students**

The demand from internationally mobile students may be affected by three factors. One is the global financial crisis. With a majority of international students in the United States paying their own way, growth will to a large extent depend on an increase in the number of students who are willing and able to pay. Students interested in a foreign education may instead opt for programs that permit them to complete part of their degree at their home institution under a partnership agreement with a foreign college or university. Additionally, travelling shorter distances to gain a foreign education at a regional hub may become a more attractive option, even after the financial crisis lessens.

A second factor that will determine the number of students seeking an education abroad is the increasing capacity of the sending nations. China, for example, has dramatically increased its enrollments and capacity and, over time, may send fewer students abroad. South Korea and Japan, the third and fourth largest sending countries, are experiencing a decline in the populations of college-age students, and are seeking to

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<sup>33</sup> Douglass & Edelstein. (2009, July-August). Whither the Global Talent Pool? *Change Magazine*.

<sup>34</sup> Bhandari & Chow. *Open Doors 2008*.

attract international students in part to compensate for this decline. These developments may prompt U.S. institutions to boost efforts to attract international students from elsewhere. India, for example, continues to have great unmet demand for higher education and has not increased its domestic capacity as aggressively as China. India is likely to develop policies and a legal framework that will allow foreign institutions to deliver programs within its borders, which eventually could affect the number of Indian students seeking an education abroad.

Third, as other countries ramp up their recruiting efforts (making it easier for students to identify appropriate institutions to attend) and develop favorable scholarship and visa policies, they may continue to increase their share of the overall internationally mobile student population. Competition from other countries will play a significant role in the future of internationally mobile students.

## **2. U.S. Recruitment Efforts**

Current U.S. practice in the recruitment of international students is largely a matter of the initiatives of individual institutions. While this has worked well for a small number of institutions, most other institutions have very few international students, if any. Some colleges and universities are beginning to partner with one another to recruit international students to their city, state, or region. Clearly there is room for inter-institutional cooperation, additional collaboration between institutions and government, and intensified statewide and national efforts.. Similarly, the federal government could play a more vigorous role by strengthening Education USA as well as the advising capacity in the embassies around the world. NAFSA and other associations have called for a comprehensive U.S. policy to “marshal the vital resources for international education for national purposes.”<sup>35</sup>

## **3. U.S. Visa and Immigration Policies**

A third major factor will be the policies and efforts of the United States to recruit and welcome international students. The requirement for a personal interview when applying for a visa has deterred some potential applicants. Negative publicity about visa delays and refusals of entry to foreign scholars have played a role in making the United States a less attractive destination for some students. In addition, the cost of a student visa doubled to \$200 in October 2008 in order to help fund the implementation of SEVIS II. Although the visa application process has improved considerably in the past few years, there are still delays and unexplained and seemingly arbitrary visa refusals. Finding optimal systems to balance security and openness remains a challenge. Policies that prevent international graduate students from staying in the United States after their studies are also an obstacle to increasing international student enrollments.

## **4. Scholarships**

Although most international students who come to the United States finance their studies from family or national resources, the availability of scholarships provided by institutions

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<sup>35</sup> See NAFSA: The Association of International Educators and the Alliance for International Educational and Cultural Exchange. (2007, October). An International Education Policy: For U.S. Leadership, Competitiveness, and Security.

and the government is a key factor in attracting bright students of limited financial means. Given the efforts of other countries, the United States will need to affirm the value of both institutional and federal support for international students as an investment in the quality of U.S. education as an instrument of public diplomacy and in building the country's talent pool.

This survey of the changing landscape of internationally mobile students points to the conclusion that the continued success of the United States is by no means guaranteed. In the past, the country has counted on being the most attractive destination for international students. But as suggested here, it would be unwise to assume that the past will predict the future.

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## Appendix: Defining International Students

Differing data collection methodologies and definitions of the *international student* across countries have often led to discrepancies among the international student enrollment data reported by different organizations. The authors of this issue brief have chosen to use data from UNESCO, as we believe it yields the best comparability across countries.

**UNESCO Definition:**<sup>36</sup> The definition of an *internationally mobile student* currently used by UNESCO is a person who crossed his or her national border to pursue education. Operationally, UNESCO uses permanent residence and place of prior education for classification. One additional criterion for classifying internationally mobile students is the length of study. The UNESCO definition excludes those students who are in programs for less than one year.

### Working Definitions of International Students in Top Host Countries

**Australia:** Data provided to UNESCO and other international collections are drawn from the Higher Educational Statistics Collection (HESC),<sup>37</sup> which counts of all overseas students, including those studying offshore in overseas campuses or by distance education. The HESC counts all students enrolled at Australian higher education providers, both onshore and offshore. Overseas students are defined in this collection as any student who is not in one of the following categories:

- An Australian citizen.
- A New Zealand citizen or a diplomatic or consular representative of New Zealand.
- A permanent visa holder other than humanitarian visa.
- A permanent humanitarian visa holder.

Australia Education International (AEI) uses a data collection methodology and definition for international students different from those of HESC. AEI counts actual course enrollments, using permanent residence as the defining criterion. A student enrolled in two different courses in the same reference period (for example, English Language Intensive Courses for Overseas Students and bachelor's degree courses) will have both enrollments counted. In addition, students will be counted as enrolled in Australia even if they have left Australia temporarily, for example, during end of year holidays. However, students are not recorded as enrolled in Australia if, for example, they are moving between institutions at the date of reporting and their new course details have yet to be entered. According to AEI data, there were 325,935 international enrollments in 2007 (compared with 211,526, as reported by UNESCO/HESC).<sup>38</sup>

**France:** France defines an *international student* as any non-citizen who is registered in a higher education institution with the intent to obtain a French diploma. According to CampusFrance, there were 263,094 international students in 2007 (compared with the UNESCO figure of 246,612).

**Germany:** Germany defines *international students* as nationals of any country besides Germany (or stateless students) who are matriculated at a Germany higher education institution. This definition includes two categories of students: (1) *Bildungsauslaender* students, that is, those who gained their higher education entrance qualification at a foreign school and/or completed their foreign school qualifications by attending a German Studienkolleg (preparatory course for higher education admission), and (2) *Bildungsinlaender* students, or those who gained their higher education entrance qualification at a German school or who passed a Gifted Students Test or Aptitude Test in Germany. According to DAAD, there were 246,369 international students in Germany (compared with 206,875, according to UNESCO).

**United Kingdom:** The United Kingdom uses permanent residence as a primary criterion for international students. According to the Higher Education Statistics Agency (HESA), there were 351,470 international students in 2007, which was the same number reported by UNESCO. In 2008–09, HESA began collecting data on non-UK nationals (rather than on domicile), resulting in a count of 389,330 international students.<sup>39</sup>

<sup>36</sup> UNESCO-UIS/OECD/Eurostat, 2008.

<sup>37</sup> See [www.dest.gov.au/sectors/higher\\_education/publications\\_resources/statistics/publications\\_higher\\_education\\_statistics\\_collections.htm](http://www.dest.gov.au/sectors/higher_education/publications_resources/statistics/publications_higher_education_statistics_collections.htm).

<sup>38</sup> Australia Education International (AEI). What is the AEI international student data? See [www.aei.gov.au/AEI/MIP/Statistics/StudentEnrolmentAndVisaStatistics/Explanatory.htm](http://www.aei.gov.au/AEI/MIP/Statistics/StudentEnrolmentAndVisaStatistics/Explanatory.htm).

<sup>39</sup> Lightfoot, L. (2009, 21 May). More overseas students 'found.' BBC News.

**United States:** An *international student* is defined as an individual who is enrolled for credit at an accredited higher education institution in the United States on a temporary visa, and who is not an immigrant (permanent resident with an I-151 or Green Card), a citizen, an illegal alien (undocumented immigrant), or a refugee.<sup>40</sup> According to the Institute for International Education's 2008 *Open Doors* survey, there were 582,984 international students in the United States in 2006–07 (compared with 595,874, according to UNESCO).

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<sup>40</sup> *Open Doors 2008*.