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International Student Mobility: Recent developments and prognosis with special reference to India

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Abstract

This paper examines global student mobility. It finds that student mobility has been on the rise rapidly in the last five years, mostly of a global nature, rather than intra-regional, especially in the case of Indian students. Students are highly aspirational and seek an edge in the labour market through specialist studies and post study work rights, and are focussed on obtaining a strong return on educational investment. Universities around the world increasingly seek to cater to these aspirations. Beyond the traditionally dominant inbound countries, a number of others, including especially in Asia, are becoming hubs of international student activity both as senders and receivers. Australia is becoming an increasingly key location for students, especially in recent times for Asian students. From a strategic standpoint, it will be important to maintain freedom of movement for students to benefit individuals and host and home countries.

Key words: student mobility, India, student aspirations, home country, host country.

Introduction

This paper is in six key sections. Section one examines the recent trend and global outlook for student mobility, followed by a regional and country perspective, and also looks at the growing movement of students from emerging Asia. The second section examines the growing segmentation of students by discipline and level of study. Section three considers the key influencing factors for student decision making. The fourth section builds on section three by examining recent trends in the mobility of Indian students abroad, their motivations, including in reference to key markets of the US and Australia. Section four also canvasses student mobility into India as India attempts to reform and upgrade its own higher education scene. Section five looks at some strategic implications, especially in relation to India. Section six provides some concluding remarks.

Section One: Students everywhere

Global student mobility continues to accelerate (Institute for International Education 2018)². The benefits for students are profound, including enhanced skills and experience, potential employment prospects, nurturing and consolidating ties and networks for personal, commercial and cultural reasons. For host countries is the possibility of skilled labour through student attraction, addressing economic and labour market needs. Home countries can benefit from advanced skills on the return of students, or at least have access to a vibrant diaspora (including trade and investment ties, cultural links, ideas and knowledge connection) should students not return. A review of short term international student mobility indicated, among other things, key outcomes in terms of enhanced cultural awareness, language skills, cross-cultural communications skills, cultural adaptability and inter cultural competence or the ability to cope with life in another culture (Roy et al 2019). In cold, hard terms the direct and indirect economic impact of international students has been estimated at \$57bUS for the US, \$25.5bUS for the UK, and almost \$20bUS for Australia, with Germany and France

¹ The views expressed in this paper are the author's alone.

² Note this paper was prepared prior to the outbreak of the coronavirus, which is impacting and likely to further impact on student mobility to and from China for the foreseeable future.

over \$14USb and Canada over \$11bUS. The total global direct and indirect economic impact of Indian students is estimated at almost \$18bUS with the corresponding impact of Chinese students at \$51bUS (Choudaha 2019). The main beneficiaries of Indian and Chinese student mobility have been the US, UK, Canada and Australia.

The short period between 2013 and 2017 reveals immense growth globally in student movement from 4,230,955.1 to 5,309,240.4. Some estimates have overall growth of international enrolment rising by 51% between 2015 and 2030 or some 2.3 million students (Choudaha 2019). According to Choudaha (2019) there are, and have been, “three waves” of international student mobility: the period **2001- 2008** defined by terrorist attacks of 9/11 leading to student demand shifts from the US to Australia, Canada and the UK, the emergence of world class universities in Asia and the growth in intra- European student mobility; the period **2008-2016** characterised by the impacts of the Global Financial Crisis, more pro-activity in the US in regard to student attraction and retention, the continued rise in Asian institutions in terms of rankings, and as regional hubs, the growth of China’s middle class, Indian students desire for post-graduate studies, as well as tightening of post work study rights in UK and Australia amid concerns about students using study as a vehicle for permanent residency; and the period **2016 and beyond** aligned with growing inward looking sentiment on the part of Governments in US and UK especially, concerns in Canada and Australia about over-reliance on a few countries and therefore issues of sustainability of growth, as well as political and economic uncertainty in Europe, and the emergence of lower-middle income countries such as India, Nigeria and Vietnam in driving demand. Based on a range of economic, social and demographic factors, the British Council estimates (British Council 2018) that outbound student mobility growth will slow between 2015 and 2027, due in some part to slower growth in China’s tertiary age population (offset though by increase in gross enrolment ratio which means China will still be a dominant player in outbound student mobility), but also noting expected growth in outbound student mobility from other key markets, especially India, Pakistan, Nigeria and Bangladesh, associated with favourable demographics, and strong economic growth, for example. Various parts of the world, including Germany, countries in Eastern Europe, Brazil, South Korea, Malaysia, Singapore and HongKong, are expected to experience declines in outbound students, in large measure because of declines in tertiary age populations (British Council 2018).

Regional mobility

We turn to the regional implications and effects of student mobility. Our findings, drawing on UNESCO data, are that the student mobility is focused on well- known global destinations and that intra-regional flows are not becoming especially dominant save for a few areas. For example, for outbound students we find that the share of students from South and West Asia to other places in South and West Asia³ has grown slightly from 5.6 to 5.9%, as it has for central and Eastern Europe, while for North America and Western Europe it has declined as it has for Latin America (UNESCO Institute for Statistics 2019). Data for other regions intra-regionally is not available. In an inbound sense, intra-regional movement has increased in the Arab States, and for South and West Asia and Latin American, but declined for all other regions. Thus, it appears that students are quite prepared to travel far and wide when deciding where to study, rather than being bound by proximity, familiarity, and possibly cultural connections. A bold globally oriented cohort is evident.

If we examine the changing numbers and market share inbound for key countries around the world, then it is the case that the old favourites stand out. In 2017, eight countries accounted for more than 50% of students by destination. These are Australia, Germany, Japan, Russia, UK, US and Canada and

³ See Appendix One for country composition in regions.

China. While there is talk of a significant downturn in the U.S market share of international students, in fact the US has slightly increased its share of international students between 2013 and 2017 from 18.5% to 18.6%. This however is masking changes in the intervening years. The US share, for example, was more than 19% in 2016 and close to this in 2015, rising from 18.7% in 2014 (UNESCO Institute for Statistics 2019). In reality, the biggest shift and decline in the period between 2013 and 2017 was to the UK which lost 1.6% in global market share, associated in large measure due to restrictions on post study work rights, and possibly in the latter period with Brexit uncertainty. The winners in share terms have been student diversion to Australia, and to a lesser extent Germany, China and interestingly Turkey, noting the rapid growth in China. All countries have experienced growth in raw numbers. In share terms, there has been some re-alignment in that high income countries have lost some share to the upper-middle and middle income countries⁴, in part reflecting the “China effect”.

Others point though more explicitly to the “Trump factor” and that growth rate of international students in 2017 in the U.S was half that of the previous year, which was the lowest increase in US numbers over the previous 7 years, noting although that the US still is a number one destination for international students (M.M Advisory 2018). A survey of more than 500 US Institutions (Baer 2018) examining new enrollments of international students in Fall 2018 compared to Fall 2017 found that 49% of institutions experienced a drop, 44% an increase and 7% indicated stability. The top four reasons for the drop off in order of importance are: visa application processes or visa delays/denials; social and political environment in the US; enrolling in another country’s institutions; cost of tuition/fees and financial assistance issues. Other key reasons include feeling unwelcome in the US, inability to secure a job there after studies and, physical safety (e.g gun violence, civil unrest) (Baer 2018). A number of these reasons were also prevalent in previous years.

⁴ As at July 2019, according to the World Bank, low income countries are those with GNI per capita of current \$US 1025 or less in 2018, lower middle countries are between \$ US 1026 and \$ US 3995, upper middle income between \$ US 3996 and \$ US 12375, and high income countries greater than \$US 12,376

Table 1 inbound student flows (market share in brackets): Main destinations

	2013 numbers of inbound students	2017 numbers of inbound students	Inbound mobility ratio 2013	Inbound mobility ratio 2017	GDP per capita latest year PPP constant 2011 International \$	Ranked Institutions per capita latest year (population 15-64 years)	Global Innovation Rankings 2019 (out of 129 countries)	World Happiness Ranking 2019 (out of 156 countries)
Australia	249,868 (5.9)	381,202 (7.2)	-	21.48	45,439	2.1	22	11
China	96,409 (2.3)	157,108 (2.95)	0.28	0.40	16,187	0.08	14	93
Germany	196,619 (4.6)	258,873 (4.9)	7.07	8.37	45,959	1.6	9	17
India	34,419 (0.8)	46,703 (0.9)	0.12	0.13	6,899	0.06	52	140
Ireland	12,861 (0.3)	19,983 (0.4)	6.45	8.88	70,855	2.8	12	16
Japan	135,803 (3.2)	164,338 (3.1)	3.52	4.27	39,294	1.4	15	58
Malaysia	99,648 (2.2)(2014)	100,765 (1.9)	8.83	8.07	28,176	0.6	35	80
Netherlands	68,943 (1.6)	96,289 (1.8)	10.23	11.0	49,787	1.2	4	5
NZ	41,352 (0.97)	52,678.5 (0.99)	16.12	19.61	36,354	2.5	25	8
Poland	27,767 (0.7)	63,925 (1.2)	1.46	4.12	28,752	0.5	39	40
ROK	55,536 (1.3)	70796 (1.3)	1.66	2.26	36,777	0.8	11	54
Russian Federation	213,347 (2014) (4.7)	250,658 (4.7)	3.05	4.26	24,791	0.5	46	68
Saudi Arabia	62,143 (1.5)	78,344 (1.5)	4.58	4.66	48,996	0.3	68	28
Spain	56,361 (1.3)	64,927 (1.2)	2.86	3.23	35,056	2.5	29	30
South Africa	42,351 (1.0)	45,334 (0.9)	4.09	4.06	12,145	0.3	63	106
Sweden	25,437 (0.6)	28,747 (0.5)	5.83	6.74	47,194	1.9	2	7
Turkey	54,387 (1.3)	108,076 (2.0)	1.09	1.5	25,287	0.6	49	79
Ukraine	49,686 (1.2)	52,768 (0.99)	2.25	3.07	7907	0.2	47	133
UAE	59,227 (1.4)	64,447 (1.2)	44.63	33.60	66,616	0.5	36	21
UK	416,693 (9.8)	435,734 (8.2)	17.46	17.92	40,158	2.3	5	15
US	784,427 (18.5)	984,897 (18.6)	3.93	5.18	55,681	0.8	3	19
Belgium	48,748 (1.2)	44,978 (0.9)	9.98	8.54	43,218	1.1	23	18
Canada	151,244 (3.6)	209,979 (3.95)	9.72	12.92	44,070	1.2	17	0
Lower-middle income	222,551.3 (5.3)	266,152 (5.0)	0.39	0.41				
Middle	1,024,157.5 (24.2)	1,364,986.3 (25.7)	0.73	0.84				
Upper Middle	801,606.2 (18.9)	1,098,834.3 (20.7)	0.96	1.13				
High	3,148,615.7 (74.4)	3,886,512.1 (73.2)	5.75	7.17				
World	4,230,955.1	5,309,240.4	2.11	2.38				

Source: UNESCO Institute for Statistics 2019, Global Innovation Index 2019, World Bank 2019, World Happiness Report 2019, Times Higher Education 2020

Table 2 Outbound Student Flows (market share of total outbound students in brackets): Main Sources

	2013 outbound students	2017 outbound students	Outbound student mobility ratio 2013	Outbound student mobility ratio 2017	GDP per capita latest year, PPP constant 2011 International \$	Ranked Institutions per capita latest year (population 15-64 years)	Global Innovation Ranking 2019(out of 129 countries)	World Happiness Ranking 2019 (out of 156 countries)
Bangladesh	37,235 (0.9)	57,675 (1.1)	2.57 (2014)	2.09	3,879	0.009	116	125
Brazil	39,560 (0.9)	58841 (1.1)	0.52	0.69	14,283	0.3	66	32
China	719,357 (17.0)	928,090 (17.5)	2.11	2.10	16,187	0.08	14	93
France	76,654 (1.8)	89,379 (1.7)	3.28	3.53	39,556	0.9	16	24
Germany	120,510 (2.8)	122,195 (2.3)	4.33	3.95	45,959	1.6	9	17
India	190,636(4.5)	332,033 (6.3)	0.68	0.99	6,899	0.06	52	140
Iran	49,493 (1.2)	52,521 (0.98)	1.13	1.21 (2016)	19,098	0.7	61	117
Italy	50,290 (1.2)	74,268 (1.4)	2.69	4.04	35,739	1.7	30	36
Kazakhstan	54,172 (1.3)	84,681 (1.6)	6.93	13.51	24,738	0.2	79	60
Malaysia	59,826 (1.4)	63,253 (1.2)	5.36	13.51	28,176	0.6	35	80
Morocco	40,322 (0.95)	51,164 (0.96)	5.70	5.07	7,509	0.2	74	89
Nepal	32,168 (0.8)	64,054 (1.2)	6.74	17.26	2,724	0.06	109	100
Nigeria	63,904 (1.5)	85,251 (1.6)	-	-	5,316	0.04	114	85
Pakistan	40,338 (0.95)	53,023 (0.99)	2.11	2.73	4,928	0.1	105	67
Korea	113,857 (2.7)	105,399 (1.98)	3.41	3.36	36,777	0.8	11	54
Russia Federation	51,462 (1.2)	56,659 (1.1)	0.68	0.96	24,791	0.5	46	68
Saudi Arabia	74,981 (1.8)	84,310 (1.6)	5.53	5.02	48,996	0.3	68	28
Syria	25,084 (0.6)	53,612 (1.0)	3.80	6.70 (2016)	-	-	-	149
Ukraine	45,259 (1.1)	77,639 (1.5)	1.93	4.66	7,907	0.2	47	133
US	75,645 (1.8)	86,566 (1.6)	0.38	0.46	55,681	0.8	3	19
Vietnam	55,979 (1.3)	94,622 (1.8)	2.49	3.58 (2016)	6,609	0.04	42	94

Source: UNESCO Institute for Statistics 2019, Global Innovation Index 2019, World Bank 2019, World Happiness Report 2019, Times Higher Education 2020

Country mobility

Tables 1 and 2 highlight the top 20 or so inbound and outbound student countries (ie receiving and sending) where the top 20 relate to 2017 data⁵. Apart from the dominant sender countries e.g China, India and dominant receiving countries e.g US, UK, Canada and Australia, are a group of countries that we describe as hybrids, who are significant receivers and senders. These 9 countries are China, Germany, India, Malaysia, Republic of Korea, Russian Federation, Saudi Arabia, Ukraine and the US. Several important and interesting trends and features can be observed. Firstly, is that the hybrid group is mixed by way of development levels, as measured by GDP per capita, ranging from \$7907 in Ukraine to \$55,681 in the U.S. Second, that the most number of these hybrid countries are in Asia, suggesting that the Asian region is becoming a hub for multi-flows of students. The inbound importance of Asian countries stems from their investments in, and growing sophistication of their higher education base, offering of English language courses, rising development levels and their welcoming and indeed facilitative policy stances to inward student mobility. The hybrids also continue their traditional outward student mobility in the context of seeking alternative experiences, premium education abroad, access to global labour markets, and rising disposable incomes.

Dominant inbound mobility

It is also the case that dominant inbound countries are characterized by the following features:

- highest living standards (although not totally conclusive given the prominence of India, China, Ukraine, Turkey and South Africa)
- the strongest distribution of ranked institutions per capita as a quality indicator
- strength in overall innovation (apart from just education systems), as reflected in the latest Global Innovation Index, including the broader development and diffusion of research, knowledge and technology, which in turn, arguably, could be associated with stronger job and entrepreneurial opportunities for skilled graduates in innovation and knowledge intensive fields, and commercialization of knowledge from research.

Further, there is some association between inbound mobility and higher degrees of happiness amongst host countries, as measured by the World Happiness Index. However, this is not totally conclusive, as reflected in the strength of inbound student mobility and low happiness in for example, South Africa, Ukraine, India, China and Malaysia. Thus, it would appear that in some cases there are specific regional factors influencing the inward mobility of countries e.g. other African countries studying in South Africa, rather than general factors such as innovation, happiness and level of economic development as host factors. There seems, on balance, a stronger association between inbound mobility and global innovation rankings than in relation to happiness.

A number of Asian countries are undertaking significant policy developments, allied with initiatives of Higher Education Institutions, focused on inward student mobility. For example, Philippines is becoming more popular for English language programs, Japan is increasingly recruiting within Asia, China is a leading nation for hosting international branch campuses, and Taiwan's Ministry of Education plans to more than double the inward student intake over a two year period to 2019

⁵ The section pertaining to Tables 1-3 for student mobility draw on UNESCO Institute for Statistics (UIS) data. According to UNESCO and OECD international students are those who have crossed a national or territorial border for the purpose of education and are now enrolled outside their country of origin. These data do not include short term study experiences or exchanges.

(Studyportals 2017). The importance of Asia as study destination is underscored also by its later internationalization process, meaning it has significant capacity compared to Europe which has reached maximum capacity. One “game changer” is the growth in English language offerings, particularly the case in Malaysia, China, Taiwan and Hong Kong (Studyportals 2017).

Outbound student mobility

Outbound student mobility is dominated by China and India (although not so pronounced when considering outbound mobility ratio which measures outbound students relative to domestic tertiary base), and to a lesser extent Vietnam, Korea, Saudi Arabia, and interestingly the US (which highlights in general its global reach). As is to be expected, in general terms, outward mobility is associated with lower levels of GDP per capita, and the lower reaches of happiness. Students are moving to countries by and large which have a higher number of ranked institutions relative to population, to countries which are better off economically and have higher living standards (which in turn is associated with their capacity to offer high quality education and broader facilities) and (with some exceptions) to happier countries than their own, as reflected in the fact that countries which are major senders are also those that are at the lower reaches of happiness. However, what is not so clear cut is any association between outbound mobility and Global Innovation. It is not always the case that students are moving in droves from lower innovation nations. It may possibly be that education and training are de-linked from the broad innovation capabilities of a home nation, including in the minds of students.

Table 3, drawn from UNESCO Institute for Statistics (2019), shows the outbound mobility of some emerging nations from Asia, which is of growing importance, even though a number of these are not yet in the top 20 outward sending nations in absolute terms. Growth in student flows is associated with rising income levels and aspiration, and welcoming host country policies. Even in the relatively short time frame that we have data for, what we see is the rapid growth from Vietnam, Philippines, Nepal, Bangladesh, and of course India and China is pronounced. In a number of these countries, growth is coming from a low base admittedly. Further, and interestingly, overall growth in outbound mobility exceeds growth in the movement of goods and services for a number of these nations. Thus, it is the people movement via students, that appears to be the principal driver of global and regional engagement when compared with trade. The gap between student flows and trade flows is particularly apparent for India, Nepal, Bangladesh and Bhutan (in the latter two countries trade has declined). Of interest also is that most outbound students from Asia are not just going to the traditional destinations in Oceania, US and Europe, but also to “non-traditional” locations such as Saudi Arabia, Thailand, and Egypt. There are to be sure, in some of these cases, very specific historical ties and close geographic proximity. Of note also is that India is emerging as a destination for international students, which we consider later in this paper.

Table 3 Outbound student flows Asia

	2013 outbound students	2017 outbound students	% change in outward student mobility	Main countries 2017	Change in trade 2013-2017
Vietnam	55,979	94,662	69.1%	Australia, France, Germany, Japan, U.S, UK	73.7%
Thailand	26,103	32,119	23.0%	Australia, Egypt, Japan, UK, US	5.2%
Sri Lanka	16,042	20,735	29.3%	Australia, India, Japan, Malaysia, US,	30.4%

	2013 outbound students	2017 outbound students	% change in outward student mobility	Main countries 2017	Change in trade 2013-2017
Phillipines	11,721	17,197	46.7%	Australia, US, Canada, UK, NZ	71.4%
Pakistan	40,338	53,023	31.4%	Australia, Malaysia, Saudi Arabia, UK, US	18.6%
Nepal	32,168	64,054	99.1%	Us, UK, India, Australia, Japan	66.6%
Bangladesh	37,235	57,675	54.9%	US, Malaysia, Canada, Australia, UK, Germany	-0.5%
Bhutan	3,677	4,393	19.5%	India, Thailand, Australia, US, Sri Lanka	-0.3%
Myanmar	7,418	8,965	20.9%	Us, Thailand, Japan, Australia, UK	NA
Lao	4,822	5,064	5.0%	Vietnam, Thailand, Australia, Japan, ROK	26%
Indonesia	39,448	47,574	20.6%	US, Australia, Malaysia, UK, Japan	3.5%
India	190,636	332,033	74.2%	See Table below	11.3%
China					NA
Cambodia	4,449	5,928	14.8%	Thailand, Australia, France, US, Japan	34.4%

Source: UNESCO Institute for Statistics 2019, World Bank 2019

Section Two: A nuanced view of student mobility

This section highlights the growing specialisation and differentiation of student mobility, as students increasingly seek higher value study options.

Table 4 Mobile students as a share of all students (%): Select OECD countries

	2013			2014			2015			2016		
	Bachelor	Masters	Ph.D	Bachelor	Masters	PhD	Bachelor	Masters	Phd	Bach	Masters	PhD
Australia	14	38	33	13	40	34	13	43	34	14	46	34
Canada	8	14	27	8	11	29	10	14	30	10	18	32
Belgium	8	16	38	8	20	37	9	18	42	9	20	44
France	8	13	40	7	13	40	7	13	40	7	13	40
Germany	4	12	7	4	12	7	5	13	9	5	13	9
UK	13	36	41	14	37	42	14	37	43	14	36	43
US	3	8	32	3	9	35	4	9	38	4	10	40

Source: OECD 2019

Table 4, drawing on OECD data (OECD 2019), demonstrates over time, the share of mobile students in total students, by level of study in selected major host OECD nations. What is observed is consistency over time, and that students seek out post graduate studies, especially Ph.D's in overseas markets. Thus, students are looking for a specialist orientation in their studies, to seek an edge in the labour market via value added courses and offerings. To the extent that overseas work permits are allowed, then specialist training can also be considered an entrée into residency and higher value jobs. For example in Australia, post graduate courses allow for longer post study work rights compared to undergraduates.

Student mobility by level and field

If we drill down further and look at mobile students as a share of all students by level and field based on OECD data (OECD 2019), we observe the following (Tables 5, 6, 7):

- Generally the share of international students is higher for post graduate compared to under graduate, as already seen
- Doctorates in the US are dominated by international students in engineering and construction and ICT, which one would surmise is the “Indian and Chinese” effect
- Engineering post graduate is the dominant occurrence across all countries, but to a lesser extent in Germany
- With the exception of the UK and the US, arts and social sciences is less pronounced in other countries. This may be a reflection of the traditional strengths of the US and UK in liberal arts courses, and in the case of the UK, design specialties. Much focus is on knowledge intensive science and engineering based courses, areas of continued and likely enhanced growth
- Also of interest is the popularity among overseas students of business, law and administration courses reflecting both the potentially lower cost of a number of these courses, and their popularity as a springboard to entrepreneurship and related ventures

Table 5: Mobile students as a share of all students in selected OECD countries %: Bachelors 2016

	Education	Arts and Humanities	Social sciences, journalism and information	Business Admin and Law	Natural Sciences, Maths Statistics	ICT	Eng, Manufac, Construction	Agriculture, fisheries, forestry Vet	Health and Welfare	Services
Australia	2.7	8.3	6.5	25.8	11.3	28.2	22	11.9	8.8	8.6
Canada	1.4	9.4	9.9	13.9	11.8	17.7	15.1	12.1	2.1	1.9
France	3.6	8.3	7.5	8.2	7.4	13.8	11	5.1	1.8	2.5
Germany	1.4	6.6	5.1	4.1	4.5	6.4	6.5	2.0	3.4	2.3
UK	1.6	10.1	14.4	26.2	9.5	13.3	24.7	11.7	7.8	-
US	0.7	3.0	3.9	6.4	4.4	4.7	9.3	8.2	1.5	1.9

Source: OECD 2019

Table 6: Mobile students as a share of all students in selected OECD countries %: Masters 2016

	Education	Arts and Humanities	Social sciences, journalism and information	Business Admin and Law	Natural Sciences, Maths Statistics	ICT	Eng, Manufac, Construction	Agriculture, fisheries, forestry Vet	Health and Welfare	Services
Australia	11.9	31.5	21.3	61.6	41	81.5	63.2	35.3	18.1	31
Canada	5.7	12.9	14.8	17.2	21	38.7	41.9	21	8.9	4.0
France	4.7	21.8	21.7	14.5	21.3	28.6	15.2	2.9	5.8	10.8
Germany	3.0	13.9	14.4	11	8.4	22.6	25	17.7	9.5	7.0
UK	9.6	42.4	40.1	60.1	29.9	50.4	51	25.9	12.8	-
US	2.5	13.2	9.0	12.6	17.3	38.2	34.5	0.9	5.9	2.2

Source: OECD 2019

Table 7: Mobile students as a share of all students selected OECD countries % Doctoral 2016

	Education	Arts and Humanities	Social sciences, journalism and information	Business Admin and Law	Natural Sciences, Maths Statistics	ICT	Eng, Manufac, Construction	Agriculture, fisheries, forestry Vet	Health and Welfare	Services
Australia	22.8	18	21.4	35.9	40.8	54.3	51.8	48.4	23.9	31.1
Canada	13.1	21.2	17.5	27.4	38.6	46.5	53.5	47.5	20.7	7.7
France	29.6	39.7	39.6	39.4	36.7	53.2	49.7	-	25.2	24.8
Germany	8.4	8.6	10.7	5.7	9.1	11.4	14	8.5	6.0	8.0

	Education	Arts and Humanities	Social sciences, journalism and information	Business Admin and Law	Natural Sciences, Maths Statistics	ICT	Eng, Manufac, Construction	Agriculture, fisheries, forestry Vet	Health and Welfare	Services
UK	31.1	37.6	46.3	57	37.6	58.2	60.2	44.1	32.9	-
US	6.1	26.4	28	25.3	53.1	80.3	85.3	74.2	22.8	23.4

Source: OECD 2019

Aspirations

That students have different aspirations, expectations, financial capacity, labour market attachment and personal traits is exemplified by Choudaha, Ororsz and Chang (2012) in segmenting international students who wish to study in the US. According to the authors there are four types of prospective students: Explorers (most interested in the personal experiences and who plan to attend a second tier institution and generally have low academic preparedness and high financial resources); High Fliers (academically well prepared and who have financial means, and usually look to study in high reputation institutions); Strugglers (limited financial resources and relatively low academic preparedness and often need additional preparation for overseas study); and Strivers (those employed either part time or full time during the application process, who have high academic preparedness and seek financial aid and wish to study in top tier institutions). According to the research, some 46% of Indian respondents to a survey were strivers, followed by 27% who are strugglers, 14% high fliers and explorers 13%. By contrast, the corresponding numbers for China are 19%, 21%, 32% and 28%. In short, prospective Chinese students are better academically prepared and have less financial concerns and constraints than Indian counterparts. In fact, India has the highest percentage of explorers compared to Chinese, Korean and the average of all countries prospective students to the US.

Just as one sees segmentation by students, so to must Institutions move with the times. In an environment in which global competition for students is strong and growing, Universities are, and will need to, define and re-define their basis of advantage, around niche research focus, student experience centric institutions, industry focused ones and digital hubs, allied with strategic responses around what the best approach is to innovating new programs, delivering existing programs in innovative fashion, both onshore and offshore, and English versus non English language programs (Choudaha and Rest 2018).

Section Three: The Student View

Increasingly, students are viewed by institutions as customers or core stakeholders, whose expectations need to be understood, addressed and met. Institutions and indeed nations are much more acutely aware of student sentiment particularly among the globally mobile students who actively choose which countries and institutions to study in. As such, consumer satisfaction survey data is important to understand. A recent global survey of student satisfaction, encompassing both domestic and international students, revealed a number of important features. Overall, students are very satisfied with their study experience, more so for post graduate students, older students, and international students compared to domestic students. In addition, less teacher-student engagement is also a barrier for domestic students undertaking bachelor's courses because of larger class sizes and demands of higher studies when compared to secondary studies. (Studyportals 2019). Older students and those undertaking post graduate studies have greater career and study clarity, and life and study experience which might account for their greater satisfaction compared to undergraduate and younger cohorts. The greater satisfaction of international students might be linked with studying in locations which are of better living standards, having higher quality institutions with greater resourcing and facilities, and stronger reputation than those institutions in their home country.

The following table drawn from Study Portals (2019), with author modifications, outlines student satisfaction in various locations, in comparison with global averages. “Above” refers to above global averages, “below” to below global averages and the remaining category is “at average” global standards.

Table 8: Student ratings of study markets

	Overall Rating	Teacher-student interaction	Admission process	Career development	Student diversity	Quality of student life
UK	Above	Above	Above	Above	Above	Above
Ireland	Above	Above	Above	Above	Above	Below
Belgium	Above	Below	Below	Below	Below	Above
Netherlands	Below	Below	Below	Below	Below	At global average
Austria	above	below	below	above	above	above
Switzerland	above	above	above	above	above	above
Germany	below	below	below	below	below	below
US	Above	Above	Above	Above	Above	Above
Canada	Above	Above	Above	Above	Above	Above
Cyprus	below	above	above	below	above	below
Israel	below	below	below	below	below	below
Turkey	below	above	above	above	below	below
Lebanon	below	above	above	above	above	above
Iran	below	below	below	below	below	below
UAE	below	above	below	below	below	below
Egypt	below	below	below	below	below	below
Jordan	below	below	below	below	below	below
Iceland	above	above	above	above	above	above
Denmark	above	above	above	above	above	above
Norway	above	above	above	above	above	above
Sweden	above	above	above	above	above	above
Finland	above	above	above	above	above	above
Estonia	above	above	above	above	above	above
Latvia	Below	above	above	above	Below	Below
Lithuania	above	above	above	above	Below	Above
Australia	Above	Above	Above	Above	Above	Above
New Zealand	Below	Above	Below	Below	Above	Below
Spain	Below	Below	At global average	Above	Below	Above
Portugal	Portugal	Above	Above	Above	Above	At global average
Italy	Below	Below	Below	Above	Below	Above
France	Below	Below	Below	Above	Above	Below
Malta	Below	Below	Below	Above	Below	Below
HongKong	Above average	Above	Above	Above	Below	Below
Indonesia	Above average	Above	Above	Above	Above	Above
Philippines	Above average	Above	Above	Above	Above	Above
Taiwan	Above average	Above	Above	Above	Above	Above
Malaysia	At global average	Above	Above	Above	Above	Above

	Overall Rating	Teacher-student interaction	Admission process	Career development	Student diversity	Quality of student life
South Korea	Below global average	Above	Above	Above	Below	Above
China	At global average	Below	At average	Below	Above	Above
Singapore	Below average	At global average	Above	Above	Above	Above
Japan	Below average	Above	Above	Above	Above	Above
Mexico	Above	Above	Above	Above	Above	Above
Brazil	Above	Above	Above	Above	Above	Above

Source: Study Portals 2019 with author modification

This table of satisfaction drivers which incorporates both domestic and international students, shows that the U.S, UK, Canada, Iceland, Denmark, Norway, Finland, Sweden, Estonia, Australia, Mexico and Brazil, are considered above global average in all dimensions. Many of these are traditional destinations for international students. Nordic and Scandinavian countries, if not dominant in world terms, have a reputation for high quality education. Results for countries such as Iceland, Mexico and Brazil, are somewhat surprising since they are not known for being hubs of international student activity. It may be that they are highly satisfactory largely for domestic students, which account for these ratings. Also surprising given the volume of international students, and its low or non-existent tuition fees is Germany which obtained below average results. A key reason includes the absence of strong teacher-student interface (Studyportals 2019). In the Asian domain, a number are above global average on all or a number of metrics suggesting the rise of Asian institutional strength.

The data on the drivers of international higher education mobility and associated “push” and “pull” factors highlights the importance of employment goals in student intentions, including post study work rights, but also from a host country perspective, the balance between education and migration. A number of countries now have significant programs in place to promote post study work rights of various length, and different periods depending on level of study (Berquist et al 2019). In the US optional practical training is included in the student statistics as it requires the approval of the host institution, and thus become part of the student journey. The importance of employment post study is seen by the sharp decline of UK enrolment following the abolition of post study work rights in 2012.

Australia is also a good case in point of the interface between study and work. The explosion of vocational education and training (VET) in the latter part of last decade was fueled in large measure by the desire and intention to obtain permanent residency (Hall 2019). Accordingly, the policy was tightened to break the nexus between education and migration, and enrollments declined dramatically. Following further policy re-alignment including new visa arrangements, enrolment again picked up. The new policy arrangements allowed for two streams of temporary work visa after graduation (and more flexibility of work while studying), centred around addressing occupations in demand with a visa for 18 months after study completion, and a longer term working visa for 2-4 years with even longer periods for higher levels of qualification, and willingness to re-locate to regional areas (Berquist et al 2019). In Australia, five countries have accounted for 70% of such temporary visas: India, China, Nepal, Pakistan and Vietnam. Not coincidentally, India and China have dominated enrolment growth (Hall 2019). Surveys conducted in Australia reveal that temporary work visa following graduation does not confer a competitive advantage in the labour market in

Australia, in terms of employability as such (but does act as a pathway to permanent residency), but its benefits lie more in networking, English language skill development, building professional contacts and gaining some work experience, which can assist eventually with employment outcomes (Tran, Rahim, Tan 2019).

Section Four: Indian Student Mobility

What then of Indian student mobility? Indian outward student mobility is driving significant growth in international student mobility. According to UNESCO statistics, Indian outward mobility has grown from 190,636 students in 2013 to 332,033 by 2017, a growth of 74% in just four short years and a rise in its share of outbound global mobility from 4.5% to 6.3% (UNESCO Institute of Statistics 2019).

In 2017, just three markets, US, UK and Australia, accounted for close to three quarters of India's international student outflow. However, there has been some re-alignment in the share of Indian students abroad going to Australia and Canada, at the expense of the UK and US (although US is still the dominant host for Indian students by a considerable margin). Thus, although the overall US market for all nationalities has not shifted much in share terms (in fact has marginally increased as we saw), *it has declined markedly for Indian students.*

What is apparent from table 9 is that in the eyes of Indian students, a number of countries are becoming increasingly attractive (for more than 1000 Indian students in any one year). Despite being relatively small when compared to the traditional destinations of UK, US, Australia and Canada, the share of Indian students going to these other countries e.g NZ has increased, and even where the share might have declined the raw numbers have grown, with the one exception of the UAE which has declined in share terms and raw numbers. Some other insights can be noted. Indian students do not have a significant presence in Asia, except in Malaysia, suggesting that intra-Asian mobility is not a significant factor in Indian outward mobility. Second, Eastern Europe has loomed as an important destination for Indian students, arguably reflecting these countries' commitment to high quality education and the strength of India's general political and other ties with these nations. Also what is apparent is the importance of certain Middle Eastern nations as destinations. Favourable work arrangements could be one element of this.

Table 9: Indian student mobility and destination

	2013 outward	2017 outward	2013 share of outward Indian mobility	2017 share of outward Indian mobility
Italy	999	2,887	0.5%	0.9%
Kyrgyzstan	1,137	4,745	0.6%	1.4%
Malaysia	1,765 (2014)	2,263	0.9%	0.7%
Netherlands	873	1,933	0.5%	0.6%
New Zealand	6,844	12,552.4	3.6%	3.8%
Poland	223	2,084	0.1%	0.6%
Russia	2630 (approx. share as data is 2014)	6544	1.4%	1.97%
Sweden	1,069	1,840	0.6%	0.6%
Ukraine	2,627	5,885	1.4%	1.8%

	2013 outward	2017 outward	2013 share of outward Indian mobility	2017 share of outward Indian mobility
UAE	8,247	7,395	4.3%	2.2%
Kazakhstan	205	2,425	0.1%	0.7%
Ireland	536	1,621	0.3%	0.5%
Georgia	911	2,433	0.5%	0.7%
France	1,828	2,823	0.95%	0.9%
Saudi Arabia	1,573	2,020	0.8%	0.6%
Australia	16,150	51,976	8.5%	15.7%
Canada	13,626	32,616	7.1%	9.8%
France	1,828	2,823	0.95%	0.9%
Germany	5,645	13,387	2.96%	4.0%
Italy	999	2,887	0.5%	0.9%
UK	22,155	16,421	11.6%	4.9%
US	92,596.8	142,618.2	48.6%	42.95%

Criteria more than 1000 students in any of the one years.

Source: UNESCO Institute for Statistics 2019, Author Calculations

Determinants of Indian choice

What determines choice of location and institution abroad for study by Indians? Quantitatively this is as follows:

Table 10: Determinants of Indian students' choice

Tuition Fees	47%
Career Support at University	41%
Teaching Quality	41%
University reputation amongst academics	37%
Student experience	23%
University research quality	23%
University reputation amongst employers	23%
Location of University	18%
Social life	10%
Diversity of students and staff	6%
Cost of living	30%
Post study work rights	23%
Ease of getting a visa to study	11%
Safety	9%
Ease of getting a visa to work	5%

Source: QS Intelligence Unit 2019 (a), adapted by author

In qualitative terms, the following are the key “push” and “pull” factors that drive Indian students to study offshore and in particular institutions and locations (QS Intelligence Unit Reports). These are summarized as below

Table 11: Push and pull motivations for Indian students

Employability, particularly STEM
High competition for places for post graduate in STEM in India, and for jobs
Lack of industry and practical orientation to programs in India
Cutting edge research and facilities abroad
Availability of professors and their reputation offshore
Greater academic freedom abroad in choice of research
Personalised learning
Flexibility of study in overseas countries, including ability to switch subjects, undertake multi-disciplinary studies and to study courses not available in India
Cross disciplinary collaboration in research
Glass ceilings on careers in India for females and increasing ageism
Broader orientation in overseas universities, including mentoring, career guidance, internships, work experience options
Post study work rights in countries abroad and part time work options while studying
Prominent alumni of overseas institutions
Importance of new perspectives, overseas networks, cultural experiences, meeting new people from different backgrounds
Importance of family ties in a foreign location to minimize cost
Importance of subject as opposed to overall rankings

Source: QS Intelligence Unit 2016, QS Intelligence Uniy 2018 (a, b), QS Intelligence Unit 2019 (a,b,c,d) author modifications

Tables 10 and 11 indicate that Indian students take a wider, strategic and multifaceted approach when deciding when and where to study, in institutions and locations. While cost is clearly important, there are broader issues including academic quality, career prospects and seeking the best that overseas research and scholarship offers. In addition, most students prioritise the reputation of the study market over the location per se. Access to leading edge academics, facilities, and the reputation of the institution is pivotal, although broader locational attributes cannot be discounted. Further, students make calculations on overall return from educational investment rather than just purely narrower cost considerations alone, where the return on investment encompasses job prospects and post study work rights, value for money, salary, reputation and quality of institutions and visa rules (QS Intelligence Unit 2019 (a)).

The importance of high quality education for India students is underscored by examining and comparing data for Indian students in the UK and the prevalence of ranked institutions. Table 12, based on author calculation drawn from Times Higher Education data, shows that more than 50% of Indian students in the UK studied in UK institutions ranked in the top 1000 approximately in the world, with the greater proportion studying in the top 200 Institutions.

Table 12 Indian students and University Rankings

Rank of Institutions (Times Higher Education 2018)	% Indian Students in the UK 2017 by ranked institution
1-100	12.9%
101-200	11.2%
201-300	1%
301-400	3.4%
401-500	4.4%

Rank of Institutions (Times Higher Education 2018)	% Indian Students in the UK 2017 by ranked institution
501-600	4.5%
601-800	15.3%
800+	1.1%

Source : Times Higher Education 2018, Higher Education Statistics Agency 2019, Author Calculations

A recent study (Cturtle 2019) of completed student experiences of Asians from India, China and other Asian countries, who studied in Australia, Canada, NZ, UK, US and Europe revealed important insights: the importance of alumni in providing the most reliable sources of pre-departure information; that career is the dominant motivation for studying abroad; and that almost three quarters of these graduates obtained a job within 3 months of graduation, longer for post-graduation; and most international students of Canada return back to Canada. Interestingly, the study finds that Indian students are least happy with their return on investment from international investment and are more likely to take up internships (alongside Vietnamese and Singaporeans) than other country students. This once again demonstrates the highly demanding nature of Indian students when undertaking international education, and their strong career orientation.

Indian and Chinese students in the U.S

Tables 13, 14 and 15, drawing on Open Doors data (USA Institute of International Education 2019) demonstrate the importance and impact of Indian and Chinese students in the US. As can be seen, both Indian and Chinese students account for significant proportions of international students in the US, in the case of China, almost one-third, and India, almost one-fifth. India's share has improved significantly over the five year period. Correspondingly, India and China's share of total enrolment in the U.S education system has increased over the five year period. The sharp divide between the profile of Indian students in the US compared to China can be seen in the much higher share of post-graduate and Online Practical Training (OPT) in India's international student mix compared to China (although volumes are higher from China) . By contrast, China has a much higher share of undergraduate in its study mix. It should be noted that India's post graduate share most recently has declined (although OPT has increased). Overall, the Indian experience demonstrates the importance of seeking out of higher value, specialist training which could lead to a labour market "edge" as exemplified by post graduate and OPT data. Also, and arguably, OPT is a pathway to potential migration. The preference for post graduate over undergraduate could also be associated with affordability issues in the sense that Indian students may be saving up through some work at home, before venturing overseas to undertake further studies.

Table 13: Indian and Chinese share of total international students in US

	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018
India share of international students	11.8%	11.6%	13.6%	15.9%	17.3%	17.9%
China share of international students	28.7%	30.97%	31.2%	31.5%	32.5%	33.2%

	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018
India numbers	96,754	102,673	132,888	165,918	186,267	196,271
China numbers	235,597	274,439	304,040	328,547	350,755	363,341
Total International student numbers	819,644	886,052	974,926	1,043,839	1,078,822	1,094,792
Total student enrollment	21,253,000	21,216,000	20,300,000	20,264,000	20,185,000	19,831,000
India share of overall enrollment in US	0.5%	0.5%	0.7%	0.8%	0.9%	1.0%
China share of overall enrollment in US	1.1%	1.3%	1.5%	1.6%	1.7%	1.8%
International share of total enrollment	3.9%	4.2%	4.8%	5.2%	5.3%	5.5%

Source: Institute of International Education 2019 and Author calculations

Table 14: Indian share of international enrollments in US by level of study (raw numbers in brackets)

	Undergraduate	Graduate	Non-degree	OPT
2012/2013	13.2% (12,740)	56.4% (54,607)	1.6% (1,576)	28.85 (27,831)
2013/2014	12.3% (12,677)	59.5% (61,058)	1.2% (1,242)	27.0% (27,696)
2014/2015	12.4% (16,521)	64% (85,055)	1.4% (1,924)	22.1% (29,388)
2015/2016	11.6% (19,302)	61.4% (101,850)	1.5% (2,438)	25.5% (42,328)
2016/2017	11.8% (21,977)	56.3% (104,899)	1.2% (2,259)	30.7% (57,132)
2017/2018	11.9% (23,346)	48.7% (95,651)	0.95% (1,884)	38.4% (75,390)

Source: Institute of International Education 2019 and Author calculations

Table 15: Chinese share of international enrollments in the US by level of study (raw numbers in brackets)

	Undergraduate	Graduate	Non-degree	OPT
2012/2013	39.8% (93,789)	43.9% (103,505)	6.1% (14,335)	10.2% (23,968)
2013/2014	40.3% (110,550)	42.2% (115,727)	5.4% (14,761)	12.2% (33,401)
2014/2015	40.96% (124,552)	39.6% (120,331)	5.3% (16,043)	14.2% (43,114)
2015/2016	41.3% (135,629)	37.5% (123,250)	5.3% (17,475)	15.9% (52,193)
2016/2017	40.7% (142,851)	36.6% (128,320)	5.6% (19,749)	17.1% (59,835)

	Undergraduate	Graduate	Non-degree	OPT
2017/2018	40.9% (148,593)	36% (130,843)	5.0% (18,225)	18.1% (65,680)

Source: Institute of International Education 2019 and Author calculations

Indian Students in Australia

The comparison of Indian and Chinese students in Australia over the last few years is shown in the tables below based on Department of Education data (Australian Government 2019). Tables 16 and 17⁶ compare Indian and Chinese students by type of course, rather than level or field of study. It shows higher growth in higher education for Indian students compared to China, but Chinese growth has been stronger in all other categories. In raw numbers, Indian students are far less than in China, except in the vocational sector. There was an “explosion” of enrolment from India in vocational education in the latter part of the last decade, as a pathway to permanent residency, and also to address key skills shortages. It may also reflect the possibility that Australia does not attract the most academically orientated students from India. It should be noted that things are changing with India’s share of international higher enrolments rising from 12.9% to 18% in just three years, at the expense of vocational enrolment. Both China and India’s share of the total international market in Australia has grown in recent years. By comparison with China the school market is under-developed for India.

Table 16: Indian students in Australia: numbers and share of international students in Australia (in brackets)⁷

	2015	2016	2017	2018	% change
Higher Education	35,137 (12.9%)	44,324 (14.5%)	54,040 (15.5%)	72,050 (18.0%)	105.1
Vocational Education and Training	28,629 (17.0%)	27,298 (14.97%)	27,258 (12.6%)	29,784 (12.2%)	4.0
Schools	224 (1.1%)	218 (0.9%)	230 (0.9%)	269 (1.0%)	20.1
Elicos	7,593 (5.3%)	5,616 (3.7%)	5,062 (3.3%)	5,687 (3.6%)	-25.1
Non Award	398 (1.1%)	335 (0.8%)	376 (0.8%)	502 (1.0%)	26.1
Total India	71,981 (11.2%)	77,791 (11.0%)	86,966 (10.9%)	108,292 (12.4%)	24.5
Total all nations	642,231	709,330	796,130	876,399	

Source: Australian Government 2019

⁶ This data is onshore international students. Note that students engaged in two different courses, for example, will have enrolments counted twice.

⁷ Elicos is English Language Intensive Courses for Overseas Students

Table 17 Chinese students in Australia: numbers and share of international students in Australia (in brackets)⁸

	2015	2016	2017	2018	
HE	96,766 (35.6%)	112,511 (36.8%)	133,548 (38.2%)	152,712 (38.3%)	57.8
VET	13,291 (7.9%)	13,776 (7.4%)	18,475 (8.5%)	22,341 (9.1%)	68.1
Schools	10,265 (50%)	12,044 (51.8%)	13,494 (52.6%)	13,662 (50.97%)	33.1
Elicos	38,498 (26.7%)	41,894 (27.9%)	45,589 (29.4%)	47,762 (30.5%)	24.1
Non Award	10,858 (28.9%)	15,478 (35.1%)	19,575 (39.2%)	19,419 (38.9%)	78.8
Total China	169,678 (26.4%)	195,703 (27.6%)	230,681 (28.97%)	255,896 (29.2%)	50.8
Total all nations	642,231	709,330	796,130	876,399	

Source: Australian Government 2019

It should also be noted that these developments need to be seen in the context of growing enrolments in Australia generally, including especially from Asia (Australian Government 2019). For example, overall student growth in HE has been very significant, albeit from a low base in many cases, between 2015 and 2018, from Bangladesh (32.6%), Bhutan (150.8%), Cambodia (89.2%), Indonesia (16.7%), Nepal (135.9%), Pakistan (26.6%), Philippines (8.3%), Singapore (57.3%), Sri Lanka (88.1%) and Vietnam (24.1%). All nationalities have grown in Higher Education by 46.9% for Australia. Similarly large growth has been observed from these locations in vocational education.

Transnational Education

Beyond international movement of students is the growing provision of offshore education, or transnational education, through establishment of campuses abroad, partnerships, and other agreements. The growing importance of offshore education is due to prospects of servicing wider markets, having access to industrial and research hubs abroad, the welcoming attitude of governments abroad, cost factors for students, and as a means of obviating constraining immigration policies and rules in the country that supplies the education. While data is limited, some evidence is instructive. Data for Australia offshore provision (Australian Government 2017 (a)) indicates that there has been growth (with some perturbations along the way), with the share of the total international provision of education accounted for by offshore rising from 24.2% in 2011 to 27.2% in 2017. Thus, offshore provision now accounts for more than a quarter of international education provision. In 2017, there were 6,735 Indian enrollments in offshore education provided by Australian Institutions, making India the fifth largest offshore enrolment behind Singapore (26,965), China (22,834), Malaysia (19,916) and Vietnam (6,816) (Australian Government 2017 (b)).

A variation on this is the growth in international study experiences abroad, which comprise faculty led and other study tours, internships, classes at a host university, exchange programs, summer programs and research related experiences. For Australian students, Europe dominated these study experiences comprising around 30% of such experiences, followed by North East Asia (19.9%), South

⁸ Elicos is English Language Intensive Courses for Overseas Students

East Asia (16.8%) and Northern America (14.7%). South Asia does not as yet loom large in this provision and uptake of such experiences, accounting for only 6% of international study experiences, of which India dominates, accounting for 3.6%. In North East Asia China predominates accounting for 11.2% (Australian Government 2017 (c)). One would expect that India as a destination for study experiences would increase over time, as India becomes more of a destination for study more generally, and as it partners with overseas countries in their provision of offshore education, as well as the more liberalized approach to international education by the Indian Government.

India as a host

Table 18 shows growth in students in India drawn from UNESCO data (UNESCO Institute for Statistics 2019) It should be noted that the main sources and most growth have come from neighbours in South Asia (dominated by Nepal), Africa and the Middle East. Most of the students in India are therefore from less developed and nearby countries, reflecting affordability factors in large measure. It should also be noted that most of the students tend to be male, in undergraduate rather than post graduate courses, and concentrated in one State, Karnataka (Government of India 2018). Thus, to be a powerhouse, India needs to be able to attract students from a wider source, including from prominent global knowledge hubs, and be able to offer more variety in programs and courses and have a broader spatial distribution of international students within India. In the 2017 Project Atlas report, India was considered an emerging destination for students (Institute of International Education 2017). To be fair the recent Indian Draft Education Policy has made inward student mobility in India a priority (Government of India 2019).

Table 18 International Students in India (main sources)

	2013	2017
Congo	588	511
Ethiopia	274	723
Kenya	435	530
Nigeria	661	2086
Somalia	96	492
Sudan	1,649	2,073
Canada	325	836
US	849	1,118
Afghanistan	2,330	4,378
Bahrain	155	435
Bangladesh	774	1,526
Bhutan	2,362	2,253
Iran	2,109	1,459
Iraq	1747	813
Malaysia	1,874	1,638
Nepal	6,983	10,494
Sri Lanka	991	1,269
UAE	805	1,217
Yemen	529	1,341
Australia	75	359

Source UNESCO Institute for Statistics 2019

Section Five Strategic Implications

Overall, subject to the vagaries of international policy stances, including possible further shifts to an inward, protectionist mindset, the outlook for growing outbound mobility of India students is likely to continue. This is enhanced by India's growing economy, rise of its aspirational middle class, the growing reach of English speaking programs around the world, and favorable demographics, as indicated previously. It will be essential for India to retain and enlarge its connection to its influential diaspora as a source of new ideas, remittances, commercial, trade and other cultural links, which in turn could further stimulate inward and student mobility, in a positively reinforcing cycle.

It is also likely that India will itself become a destination for students, although noting the severe imbalance between incoming and outgoing students (Wadhwa 2018). However, a number of points need to be made. Firstly, in our view, India will need to be attractive to other sources of students from more developed nations to capitalize on leading edge research, and promote access to global research and knowledge hubs. At present India is seen as a lower cost option for the developing world. Second, India will need to improve its competitive environment as a destination. Although improving, India only has 4 cities out of 120 (and ranked in the lower reaches) in QS Best student cities (QS Best Cities 2019). Third, India should continue to improve its overall quality, transparency, reputation and governance of its education system. Of promise is the recent Draft Education Policy in India. The policy call for, among other things: two way international staff and student mobility; collaborative research; process improvements to ease student access to study in India and to work; and offering unique Indian courses. The policy builds on previous efforts to increase inward student mobility. This is on top of proposed reforms to improve accountability, transparency and governance in the sector (Government of India 2019, Kulkarni 2019). India's rise in the global university rankings is also a positive sign.

In terms of a more detailed strategic response we argue that India could utilize short term study experiences in the country as a "taster" for longer term study options, and also to canvass more job oriented, internship programs, which in turn will require significant investment in career guidance, mentorship and labour market access arrangements. Further, innovative program offerings (and modes of delivery) which identify, showcase and offer programs based on India's traditional and emerging strength areas (e.g grass roots innovation, traditional medicine) and their nexus could be further deployed. India could also continue to liberalise and free up the sector to expose it to more international competition, including through autonomous branch campus activity, noting the need for safeguards around quality and probity. Importantly also will be flexibility in study options including the growth of dual degrees, collaborative education arrangements, flexible "fly in fly out" study options, and capitalizing on the expansion of Indian institutions outward to bring further alignment with global student expectations.

Globally, it will be important for countries to resist the inward looking sentiment that appears to be on the rise, in order to reap the benefits of student mobility to address skills needs, bring personal connections and potential to bear, enrich diversity, become influential diaspora and facilitate the multi-country flow of ideas, knowhow, technology, expertise, and collaboration, central to knowledge economies. Ensuring also that females can participate in and benefit from global mobility will also be important, as student mobility for the most part is male dominated.

Section Six: Concluding Remarks

Students are on the move, more globally than intra- regionally, as our observations find. Asia is becoming a hub for higher education mobility. Students are motivated by a variety of things, with career and career support looming large, and the desire to obtain an edge in the labour market, through post-graduate studies, especially for Indian students. There are different segments of students for universities to cater to and to derive a competitive advantage.

The U.S is still the number one destination for Chinese and Indian students, although there is some evidence that an inward looking sentiment is affecting the willingness of students to move there. The UK lost market share, through its closing off post study work rights some years ago. This is now being revised. Australia, Canada and other nations have been beneficiaries of this “student diversion”.

Growth in student mobility globally, but to Australia especially, has been pronounced. Australia has one of the highest rates of internationalization of the higher education system in the world, open to all from all parts of the world, including especially Asia.

India has been sending students in large numbers although as a share of total enrollment it is not especially high. To fully capitalize on the global flow of ideas, research, collaborations and knowhow, India will need to further open up its education and training system to students especially those from advanced research hubs. To be sure and fair, the latest draft education policy in India, is flagging such a more significant role for India in inward student mobility. Further reform though is needed.

APPENDIX ONE: Description of Regions

Arab States	Central and Eastern Europe	Central Asia	East Asia and the Pacific	Latin America and the Caribbean	North America and Western Europe	South and West Asia	Sub-Saharan Africa
Algeria	Albania	Armenia	Australia	Anguilla	Andorra	Afghanistan	Angola
Bahrain	Belarus	Azerbaijan	Brunei Darussalam	Antigua and Barbuda	Austria	Bangladesh	Benin
Djibouti	Bosnia and Herzegovina	Georgia	Cambodia	Argentina	Belgium	Bhutan	Botswana
Egypt	Bulgaria	Kazakhstan	China	Aruba	Canada	India	Burkina Faso
Iraq	Croatia	Kyrgyzstan	China, Hong Kong Special Administrative Region	Bahamas	Cyprus	Iran (Islamic Republic of)	Burundi
Jordan	Czechia	Mongolia	China, Macao Special Administrative Region	Barbados	Denmark	Maldives	Cabo Verde
Kuwait	Estonia	Tajikistan	Cook Islands	Belize	Faeroe Islands	Nepal	Cameroon
Lebanon	Hungary	Turkmenistan	Democratic People's Republic of Korea	Bermuda	Finland	Pakistan	Central African Republic
Libya	Latvia	Uzbekistan	Fiji	Bolivia (Plurinational State of)	France	Sri Lanka	Chad
Mauritania	Lithuania		Indonesia	Brazil	Germany		Comoros
Morocco	Montenegro		Japan	British Virgin Islands	Gibraltar		Congo
Oman	North Macedonia		Kiribati	Cayman Islands	Greece		Côte d'Ivoire
Palestine	Poland		Lao People's Democratic Republic	Chile	Greenland		Democratic Republic of the Congo
Qatar	Republic of Moldova		Malaysia	Colombia	Holy See		Equatorial Guinea

Arab States	Central and Eastern Europe	Central Asia	East Asia and the Pacific	Latin America and the Caribbean	North America and Western Europe	South and West Asia	Sub-Saharan Africa
Saudi Arabia	Romania		Marshall Islands	Costa Rica	Iceland		Eritrea
Sudan	Russian Federation		Micronesia (Federated States of)	Cuba	Ireland		Eswatini
Sudan (pre-secession)	Serbia		Myanmar	Curaçao	Israel		Ethiopia
Syrian Arab Republic	Slovakia		Nauru	Dominica	Italy		Gabon
Tunisia	Slovenia		New Zealand	Dominican Republic	Liechtenstein		Gambia
United Arab Emirates	Turkey		Niue	Ecuador	Luxembourg		Ghana
Yemen	Ukraine		Palau	El Salvador	Malta		Guinea
			Papua New Guinea	Grenada	Monaco		Guinea-Bissau
			Philippines	Guatemala	Netherlands		Kenya
			Republic of Korea	Guyana	Norway		Lesotho
			Samoa	Haiti	Portugal		Liberia
			Singapore	Honduras	San Marino		Madagascar
			Solomon Islands	Jamaica	Spain		Malawi
			Thailand	Mexico	Sweden		Mali
			Timor-Leste	Montserrat	Switzerland		Mauritius
			Tokelau	Nicaragua	United Kingdom of Great Britain and Northern Ireland		Mozambique
			Tonga	Panama	United States of America		Namibia
			Tuvalu	Paraguay			Niger
			Vanuatu	Peru			Nigeria
			Viet Nam	Puerto Rico			Rwanda
				Saint Kitts and Nevis			Sao Tome and Principe

Arab States	Central and Eastern Europe	Central Asia	East Asia and the Pacific	Latin America and the Caribbean	North America and Western Europe	South and West Asia	Sub-Saharan Africa
				Saint Lucia			Senegal
				Saint Vincent and the Grenadines			Seychelles
				Sint Maarten (Dutch part)			Sierra Leone
				Suriname			Somalia
				Trinidad and Tobago			South Africa
				Turks and Caicos Islands			South Sudan
				Uruguay			Togo
				Venezuela (Bolivarian Republic of)			Uganda
							United Republic of Tanzania
							Zambia
							Zimbabwe

Source: UNESCO Institute for Statistics 2019

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