

Trends in International Student Mobility: A Comparison of National and Institutional Policy Responses in Denmark, Germany, Sweden and the Netherlands.

By Steve Woodfield, Kingston University

December 2009

Table of content

Introduction.....	2
1. Key Trends and Policy Issues in International Student Mobility	3
Growth and Diversity in International Student Mobility (ISM)	3
Development of National Strategic Approaches to Internationalisation	3
Increasing Collaboration and Co-operation	4
2. Comparative Overview	6
Nature and Extent of International Student Mobility	6
Strategic Approaches to Internationalisation	11
3. National Policy Responses by Key Themes	16
Marketing and Recruitment Strategies.....	16
Student Finance and Tuition Fees for International Students.....	19
Immigration and Visa Policies and Employment Regulations.....	29
International Partnerships and Transnational Education.....	32
Quality Assurance and Services and Support for International Students	37
Curriculum Reform and Foreign-Language Provision.....	40
4. Conclusions and Implications of the Research Findings for the Danish Higher Education Sector	45
Full-Degree Mobility	45
Short-Term Mobility.....	45
Strategic Approaches to Internationalisation	45
Marketing and Recruitment Strategies.....	46
Student Finance and Tuition Fees	46
Immigration and Visa Policies and Employment Regulations.....	46
International Partnerships and Transnational Education.....	46
Quality Assurance and Services and Support for International Students	46
Curriculum Reform and Foreign-Language Provision.....	47
Sources of Information	48

Introduction

This report is based on the findings from a desk-based research project commissioned by The Danish Agency for international Education that was undertaken between November 2008 and August 2009. The project focused on analysing current trends in international student mobility in higher education, and comparing the Danish response to these trends with national strategies and policies and institutional activities in a small sample of countries namely Germany, the Netherlands and Sweden¹. These countries were selected for comparison because in recent years they have, to varying degrees, increased their national-level strategic focus on attracting increasing numbers of international students (both from within and outside the European Union (EU) and the European Economic Areas (EEA)²) through co-ordinating and targeting their marketing activities, revising their policy and regulatory frameworks, and supporting institutions to develop recruitment strategies and programmes targeted at international students.

The research findings are intended to provide valuable comparative information and guidance to all Danish higher education institutions as they develop their international higher education strategies, and their policies and activities related to international student mobility³.

The first part of the report provides an analytical overview of the current issues and international policy developments related to international student mobility in higher education (both within Europe and beyond) based on a review of recently published journal articles, reports and other literature.

The second part of the report begins with an analysis of publicly available data on trends in international student mobility (for example, OECD and UNESCO statistics, data from national agencies and student survey data) focused on Denmark and its key comparator countries⁴. It then continues with a summary of some key elements of the national strategic approaches to international student mobility in each comparator country in comparison with approaches used in Denmark, using information from national-level international strategy documents and other reports.

The third section of the report is a detailed analysis of the national policy and regulatory framework related to international student mobility in each comparator country in comparison with Denmark in the following key policy areas:

- Marketing and international recruitment strategy (e.g. branding, information provision, overseas offices)
- Student finance & tuition Fees
- Visa, employment and immigration regulations
- Strategic government-to-government partnerships and alliances
- Institutional level partnerships (related to collaborative teaching provision, student exchange, study abroad and work placements)
- Quality assurance and student services related to international students
- Curriculum content and delivery (e.g. English-language provision, internationally-orientated content)

Where possible, this section of the report features examples of interesting or innovative initiatives related to the promotion of student mobility and international student recruitment, undertaken at national or institutional level.

Finally the report concludes with an analysis of the implications of the research findings for the Danish higher education sector.

¹ Current strategy and practice in other countries is also discussed where relevant. For example, the section on tuition fees and finance includes comparisons with major English-speaking destination countries (MESDCs) where appropriate.

² The term 'non-EU/EEA' is used to identify students who are eligible to be charged fees and require a student visa, etc. However, in some countries there may be slightly different arrangements about eligibility for fees, visa requirements.

³ The research focuses on student mobility rather than faculty or researcher mobility (except where researchers are students).

⁴ The literature analysis focuses mostly on material available in the English language.

1. Key Trends and Policy Issues in International Student Mobility

Growth and Diversity in International Student Mobility (ISM)

In the past 30 years, the number of students enrolled in higher education outside of their country of citizenship has risen dramatically from 0.6 million worldwide in 1975 to 2.9 million in 2006, and the number of international students is estimated to reach 8 million by 2025⁵. This rapid expansion has meant that the nature of ISM has changed rapidly and is constantly evolving in terms of mobility patterns and trends. The changing patterns of ISM can be viewed in two ways – growth and diversity. Firstly there has been an observable growth in both demand for overseas educational opportunities and capacity in higher education institutions worldwide, which is predicted to increase yet further⁶. Secondly there is a noticeable trend towards increased diversity in the types of provision (or delivery modes), host countries, and the types of students and providers engaging in international student recruitment. For example, higher education institutions are able to offer educational programmes outside of their home states and regions (transnational education), either through a physical presence overseas, or via distance education or e-learning. In many cases this programme mobility requires significant cooperation with overseas partners. This growth and diversity has been accompanied by intensified competition between countries and between providers in the recruitment of internationally-mobile students, and an increase in the volatility of international student mobility, and thus the predictability of overseas student flows. In recent years the term 'circulation' has been used to signify that flows are becoming more complex and multi-directional⁷.

Development of National Strategic Approaches to Internationalisation

In parallel with the changing patterns of cross border mobility, there has been a growth in the development of international or 'internationalisation'⁸ strategies at both national and institutional levels⁹. The motivations for such strategies are partly cultural and partly economic, although most now focus on the role of higher education institutions in developing human resources to promote national (and international) socio-economic development through recruiting the best students and staff, enabling students to pursue valuable overseas study and work experience opportunities, and supporting research collaboration with high-quality overseas partners¹⁰. International student recruitment (and mobility in particular) is becoming more important strategically in terms of the economic and social benefits that it provides for both importing and exporting countries¹¹. Within Europe, many of the national strategies have emerged in response to countries' engagement with the Bologna process which aims to develop a European Higher Education Area by 2010 that is attractive to internationally mobile students. Thus, many countries are also now actively seeking to increase their share of the international student recruitment market, particularly the recruitment of students outside the EU and EEA who may be eligible to be charged higher fees (depending on national policies).

Although the strategic approach followed in each country or institution is contextually defined, international strategies (at both national and institutional level) tend to focus on the following areas in relation to international student mobility¹²:

- a) **Marketing and Recruitment** – both national governments and individual institutions are investing in marketing and recruitment strategies to help attract overseas students either for full-programmes ('diploma mobility') or for short-term study typically up to a year in length ('credit mobility') such as study abroad and exchange programmes. Such strategies include developing national branding and marketing initiatives, analysing marketing intelligence on student profiles and decision-making¹³,

⁵ As shown by combined OECD and UNESCO data. See OECD (2008), p.352.

⁶ See Bohm, et al. (2004) and OECD (2008) op cit.

⁷ See de Wit (2008) for a fuller description of these trends.

⁸ The concept of 'internationalisation' as related to higher education is interpreted differently in different national and institutional contexts. It can be understood as a national approach or response to educational, economic and social globalisation or it can be used to relate to institutional strategies related to their various international activities. See Knight (2005) for a fuller discussion of internationalisation.

⁹ See Fielden, J. (2007).

¹⁰ The OECD has identified four main national approaches to cross-border education in use in higher education world-wide: mutual understanding; skilled migration; revenue building; and capacity building (See OECD 2004).

¹¹ OECD (2008) Op cit.

¹² International student mobility (ISM) is understood by the OECD and UNESCO as referring to situations where students physically 'cross' national borders for the purpose of study (and in some cases for volunteering or work experience placements).

¹³ There is currently very little systematic research related to international students' study choices, although the evidence that is available suggests that students choose their destination country before selecting an institution and programme. See Santiago et al

developing an overseas presence in selected locations, and fostering collaborative relationships within key countries at both national and institutional levels. Within Europe there has been a trend towards developing programmes in non-native languages aimed at helping to recruit more overseas students (e.g. particularly in the Netherlands, but also in Germany and the Nordic countries). In many European countries there is a specific national policy to support and encourage institutions to develop English-language provision. English is widely perceived as the global language of business and education and such policies are designed to help recruit a wider-range of international students and to provide home students with the English language skills to help encourage more outward mobility in both study and employment. Some countries also provide recruitment incentives to international students, such as scholarships and grants, and have modified immigration and visa regulations to provide international students with the ability to work during and after study.

- b) **Changing Financial Arrangements** – in most countries worldwide there has been a reduction in the amount of public funding per student for higher education combined with government encouragement for institutions to generate additional sources of income, usually via student fee income. In Europe, national governments are becoming less willing to subsidise students from outside the EU/EEA, and the introduction of tuition fees for such students is a relatively new and sometimes controversial development. The fee income from international students in most European countries is usually focused on covering the cost of recruiting, teaching and supporting students rather than generating surplus revenue through differentiated fees for non-EU/EEA students (as is the case in the UK or Australia for example). National governments expect institutions to use this additional income to improve the quality of their education provision, facilities and student support services, all of which have been identified as key factors in attracting international students and developing institutions' reputations internationally.
- c) **Educational Capacity Building and Quality Enhancement** – institutions and national governments world-wide are seeking to enhance the quality of their higher education provision and view international mobility as a key element in achieving this goal. For emerging economies, cross-border education (both ISM and transnational education) can play a key role in capacity building in terms of skills development, widening access, building research capacity and a broader contribution to socio-economic development (e.g. in the Middle East and Asia). For institutions in more developed countries international strategies which focus on international student recruitment and engaging in collaborative projects and programmes (in teaching, research and knowledge transfer) can help improve academic and research capacity, and help support a wider 'internationalisation' agenda in terms of developing globally relevant curricula, facilitating student and faculty exchange, and improving campus diversity.
- d) **Regulation and Quality Assurance** - at the national level, governments are increasingly emphasising the importance of regulation and quality assurance related to international student mobility and there is considerable scope for innovative practice in this area to help gain competitive advantage. There is usually a marketing rationale for such policies which often seek to ensure that the quality perceptions of a national education system overseas are not damaged by low quality and substandard provision, and inadequate entry standards. In many countries immigration and employment regulations have been reviewed so as to attract and retain highly-qualified international scholars. Some countries (e.g. the UK) have developed guidance on quality assurance in this area and others have focused on consumer protection as a means of ensuring minimum standards of support for international students (e.g. the Netherlands and Australia). Individual institutions are also participating in benchmarking activities to gain an insight into the quality of their academic and administrative services to international students.

Increasing Collaboration and Co-operation

Although there is a trend towards intensified competition in international student mobility (at both national and institutional levels) mutually beneficial collaborative and cooperative partnerships remain a major feature of international education, particularly within different regions but also inter-regionally¹⁴. At the national level within Europe, there are also a significant number of government to government, or multi-lateral partnership agreements related to student mobility that are designed to foster collaboration and achieve mutual benefit for both partners – for example through promoting student or researcher exchange and joint degree programmes. In addition, many European countries are also pursuing strategic national-

(2008) for an interesting discussion about student decision making and Altbach et al. (1985) for a discussion on 'push' and 'pull' factors affecting student choices.

¹⁴ OECD (2004) op cit.

level alliances with key countries outside Europe, such as the USA, China and India which they hope will foster student, researcher and staff mobility and other types of collaboration in areas such as research and collaborative teaching provision. There are an increasing number of offshore or transnational offices or bases in Asia and the Middle East and these are often intended to act as regional hubs, which can help to support student recruitment and other types of international engagement (e.g. with the business sector) in key countries and regions.

At the institutional level, there are also many examples of bi-lateral partnerships between institutions which often have a focus on facilitating student mobility (and also faculty and researcher mobility) as part of a broader range of collaborative international activities. Where collaborative teaching provision is involved this is usually described as 'transnational provision' which is envisaged as a complement to overseas study, through the creation of new (and stable) channels of overseas recruitment, and to provide different study options for students overseas without the need to leave their home country. There is also a growing trend towards either self-funded or externally-funded dual or joint degree programmes which are emerging as a new type of mobility (usually not captured by mobility statistics). This type of provision includes the Erasmus Mundus programme which supports multi-institutional partnerships within Europe, and the Atlantis/FIPSE (a joint European-US program) which involves US institutions in partnership with institutions in Europe and other parts of the world. These programmes generally require students to study in more than one of the partner institutions.

2. Comparative Overview

Nature and Extent of International Student Mobility

Recent research reports suggest that supply and demand for cross-border education have increased dramatically in recent years, and are projected to increase dramatically in the next twenty years¹⁵. Interestingly, trend data shows that international student numbers in different countries (and from different source countries) can vary from year to year, meaning that the market is volatile and relatively soft, which makes projections related to student flows very difficult. This is particularly the case with transnational education. Students can gain a range of personal and professional benefits from an international study experience including studying in a different language and living, working and studying with people from different cultures and the opportunity for employment and migration overseas after the study period ends.

Global student flows impact on different countries in different ways, some of whom are major host destinations whilst others see large numbers of their students travel overseas either for part or all of their studies. International student mobility is also closely integrated with debates around whether student mobility acts as a subset of highly skilled migration, more so for diploma than credit mobility. International student mobility could be described as 'brain circulation' but could equally be described as 'brain gain' or 'brain drain' for importing and exporting countries depending on their national context. Students travelling overseas to study can also benefit sending countries through capacity-building should the students return home after their studies to help contribute to national socio-economic development goals. Thus it is important to understand where internationally mobile students are going and coming from and to compare the balance of 'inward' and 'outward' mobility in different countries. National governments are promoting both outward and inward mobility and in the Leuven Communiqué of 2009 European Ministers Responsible for Higher Education set a target that 20% of students graduating in the European Higher Education Area at some point during their education should undertake a period of study or training abroad¹⁶.

Some experts¹⁷ suggest that little is known about the true nature and extent of international student mobility, because of a lack of accurate and comparable data in different countries, and the limited number of large-scale research studies on this topic. Although official statistics on international enrolments are collected by UNESCO, OECD and EUROSTAT these do not cover 'credit mobility' (although some study abroad is covered) are incomplete at doctoral level, and often do not distinguish between Bachelor and Master's students. The main reason for this is that data is collected by national agencies for their own purposes (e.g. to keep track of overseas enrolments and to monitor trends (e.g. in subjects, country of origin, etc.) using their own data collection definitions which often differ (e.g. whether the definition of an international student is based on residency, nationality, etc.))¹⁸. For this reason, this report mainly uses data from national agencies and a summary of this mobility data and the key challenge of international student recruitment is provided below in Table 1.

¹⁵ See Bohm et al. (2004) op cit. and OECD (2008) op cit.

¹⁶ 'The Bologna Process 2020 - The European Higher Education Area in the new decade'. Communiqué of the Conference of European Ministers Responsible for Higher Education, Leuven and Louvain-la-Neuve, 28-29 April 2009. Available at: http://www.ond.vlaanderen.be/hogeronderwijs/Bologna/conference/documents/Leuven_Louvain-la-Neuve_Communique%C3%A9_April_2009.pdf

¹⁷ See Santiago et al. (2008) op cit., Lasanowski (2009) and Teichler (2008). for a fuller discussion of these issues.

¹⁸ For example, in Sweden, there is no systematic recording of student nationalities, and many students are unclassified. Furthermore, many students recorded as 'free moving students' are not registered for full-degrees, there are taking shorter courses, lasting one or two semesters (for which they receive credits).

Table 1: Mobility Data by Country

	Internationally mobile students (%) ^a	Diploma		Credit		Key Current Issue for Mobility
		Inward	Outward	Inward	Outward	
Denmark^b	5.5%	7,757	3,154	6,713	4,950	Negative impact of fees for non-EU/EEA recruitment
Germany^c	11.3%	224,687	N/A	8,919	26,286	Lack of alignment with Bologna structures
Sweden^d	5.4%	16,700	20,000	11,200	6,000	Limited number of full-degree non-EU/EEA students & plans to introduce fees for Non-EU/EEA Students in 2011
Netherlands^e	4.7%	33,000	38,830	7,250	5,700	Recent introduction of non-subsidised non-EU/EEA fees

a. Data from the OECD Education at Glance (2009). All data relate to students who cross borders for the purpose of study - except in Germany where data covers all students with a 'foreign' nationality. The Netherlands data is believed to be an underestimate.

b. Data from 2006-7

c. Data from 2007-08, except for outward mobility where it is from 2006. In 2006 there were 83,000 German students studying abroad in total - the credit mobility data includes Erasmus students only.

d. Data from 2006-7

e. Data from 2008-9

Denmark

In recent years the number of foreign students in Denmark has increased steadily. In 2007-08 there were 15,265 international students¹⁹ in Denmark including 7,202 exchange students and 8,063 international full-degree students, a total rise of around 2% compared to 2006/07. In 2007-08 there were 1,100 Chinese students in Denmark and 600 from India, Iran, Iraq, Pakistan and Russia. Of these there were 1,600 international non-EU/EEA diploma-mobile students in Denmark, including 995 students from China and 256 from India (the second largest source country). The number of new non-EEA full-degree students in Denmark in the academic year 2007/8 was 813, up from 741 in the previous academic year. However, in year 2005/06 1,274 international students were enrolled in a full-degree programme, the last year before tuition fees were introduced in 2006-07. Universities Denmark reported that 178 non-EEA students paid tuition fees in 2006, 322 in 2007 and 512 in 2008²⁰.

The highest number of full-degree international students in 2007-08 (2,917) came from other Nordic countries, 2,061 (26%) came from other EU/EEA countries and 30% (2,448 students were from outside the EU/EEA)²¹. In the short-cycle sector, just over half of international students came from outside the EU/EEA, whilst universities and the medium-cycle sector had the most students from other Nordic countries. The proportion of non-EU/EEA students grew, but is still below 2005-06 levels, which is considered to be influenced by the introduction of tuition fees for non-EU/EEA students effective from 2006/07. Most international full-degree students were studying at university level (5,341) and on Master's programmes. Historically, Denmark has attracted foreign students because of perceptions of high quality education and the country's safety, as well as the lack of tuition fees which offset the higher living costs than some other countries so it is unsurprising that the introduction of fees for non EU/EEA students has made Denmark less attractive for many of these students.

In 2006 there were concerns about the number of foreign students (mainly from Sweden) enrolled in courses in medicine and veterinary science, given that a high number of Danish applicants were unable to gain entry into medicine potentially harming future doctor recruitment. In the same year Swedish students accounted for 50% of veterinary students and 25% of medical students enrolled in Danish universities, attracted to Denmark because of limited access at home, and the availability of internships. Unlike Norway,

¹⁹ In Denmark an international student is defined as someone who has moved to Denmark for the purpose of study. Foreign students resident in Denmark are not included in this category.

²⁰ See The Danish Agency for international Education (2008) and Carlsson et al., (2009) for a more detailed discussion of recent data on international student mobility in Denmark.

²¹ There was another 637 international students without information of home-country. These have not been included in the statistics.

as an EU country Denmark was unable to set a quota of Swedish students due to the EU's anti-discrimination legislation²².

Most of the inward international student mobility in Denmark relates to either postgraduate taught Master's programmes or credit mobility/exchange programmes (lasting less than an academic year). The relatively low numbers of international students in Denmark is linked to the limited number of English-language programmes compared with other neighbouring countries (particularly the Netherlands and Sweden). Denmark has ambitious plans to increase its proportion of international students in the next five years (both from the EU/EEA and beyond) and also hopes that a significant number of foreign graduates will remain in Denmark after their studies for employment to help contribute to Denmark's economic competitiveness²³. This will be achieved through a more focused internationalisation strategy and by co-ordinating institutional and national efforts.

In terms of outward mobility in 2007/8 8,272 Danish students studied abroad (5,123 on exchange programmes). Outward mobility for exchange programmes has increased steadily in recent years, but full-degree outward mobility has declined. Denmark has an imbalance regarding credit and exchange mobility, and there have been recent initiatives to try to ensure greater parity in exchange. The 2004 Danish internationalisation strategy prioritised increasing the numbers of Danish students to study abroad as part of their studies, particularly via the EU-funded Erasmus, and Tempus programmes and also as part of the Nordic mobility programmes Nordplus funded by the Nordic Council of Ministers to promote co-operation in higher education between the Nordic countries, Greenland, the Faroe Islands and the Baltic countries.

Germany

Germany is the world's third largest recruiter of international students (234,000 in 2007-08²⁴), after the USA and the UK. Germany is the world's third largest economy and the largest in the EU and has a higher education system that is highly competitive internationally: its research universities are world-renowned, while its universities of applied sciences²⁵ have competitive advantages such as the fact that they offer vocationally-orientated programmes which combine academic and practical elements, have small class sizes, and offer partnerships with employers (e.g. for work placements and applied research) and professional organisations both in Germany and internationally. The quality of technical and engineering programmes at German HEIs is also considered to be very high.

However, the total number of international students in 2007-08 declined from over 246,000 in 2006-07. Since 2003 the number of first-year international students with non-German HE entrance qualifications has been slowly declining, which has prompted a drive to improve international student recruitment.

In 2007-08 56,000 international students earned their university entrance qualification in Germany ("Bildungsinländer") and the other international students earned their entrance qualification abroad ("Bildungsausländer"). The percentage of international (EU and non-EU) students in German higher education increased from 8.3% in 1997 to 11% in 2002 and 12.4% in 2007 but has stagnated in recent years. In 2006, 51% of all international students in Germany came from other European countries (mainly Poland, Bulgaria and Russia), 32% from Asia, 11% from Africa, and 6% from North and South America. Germany recruits significant numbers of students from China (10%) which is Germany's most important partner in education and research co-operation²⁶. It also has large numbers of students from other countries with which it has strong social, political and economic ties such as Turkey, Morocco, Russia and the Ukraine – the latter two countries as part of Germany's cooperation with the Commonwealth of Independent States (CIS) in research and technology. The most popular areas of study (at both Bachelor's and Master's levels) for international students in Germany are language and cultural studies (including music), law, economics and business, and maths, natural sciences and engineering²⁷. At institutional level, different German HEIs have different target markets, and thus attract students from a range of different countries, whilst applied universities attract a higher proportion of students at undergraduate level.

²² See OBHE (2006) for a more detailed discussion of this issue.

²³ See OBHE (2008a) for more details.

²⁴ See DAAD and HIS (2009) for recent data on international students in Germany.

²⁵ The German Universities of Applied Sciences (Fachhochschulen) focus on professional, rather than traditional academic education and have strong links with business and industry.

²⁶ See OBHE (2008b) for a useful discussion of recent mobility data in Germany.

²⁷ See Berchem, T. (2007) and data from Wissenschaft weltweit 2008. Please note that these data are based on those international students that have acquired their HE entry qualification outside of Germany only.

In 2006, there were 83,000 German students studying abroad (an increase of 7% from 2005), the most popular destinations remain the Netherlands, the UK, Austria and Switzerland, attracted by proximity and in some cases the course structures and examination systems. Around 16% of German students take a semester abroad during their studies and German students are relatively mobile, particularly those from higher socio-economic groups. In addition to regional programmes such as the Erasmus programme, German institutions have their own individual arrangements. However, the European Credit Transfer System (ECTS) is not being applied by all higher education institutions in Germany, and the Lisbon Recognition Convention was only signed by Germany in 2007, although all Germany's higher education institutions are expected to adopt the Lisbon requirements into their quality assurance systems by 2009²⁸. The German government has a target to increase the number of Germans studying abroad to 100,000 and since January 2007 German students have been able to receive financial support for the full length of study courses abroad²⁹.

Sweden

Despite having a relatively small higher education sector, Sweden has enjoyed significant increase in overseas enrolments in recent years (27,900 international students³⁰ were enrolled in 2006/7, an increase of 9% on the previous year³¹). International students now comprise just over 7% of the total student population in Sweden, and international student numbers have risen by 13% on average per year since the mid 1990s. Most international students studying in Sweden are either exchange students (around 50%) or students studying on short courses rather than full degree programmes. In 2007 international students comprised half of all students enrolled on Master's programmes and 29% of doctoral students³².

A number of Swedish higher education institutions have strong international reputations in business and technology and they are valued partners in networks and alliances with 'world-class' institutions abroad. A Högskoleverket survey suggests that half of the free movers are well motivated students who want to study in Sweden in order to improve their career opportunities. Approximately one third of the free movers come for the personal experience. They choose to study in Sweden because English is the medium of instruction, the programmes are appropriate and the tuition is free. Students use the HEI ranking in order to select a HEI if they have no prior knowledge of Sweden. Their experience of Sweden as a study destination is very positive³³.

Two-fifths of all international students are studying in Sweden as part of an exchange programme (11,200) and the numbers of such students have more than doubled over the last decade. The remaining international students in Sweden apply directly to Swedish HEIs and are described as 'free movers' (approximately 16,700 students in total). It is estimated that only 20-40% of these students are registered for complete programmes (almost all at Master's level) and most 'free-movers' are enrolled on shorter courses of one or two semesters in length.³⁴ Since 1983 all students in Sweden study on 'courses' with credit attached which last between 5 and 20 weeks, and only a proportion of such students enrol onto a complete educational programme such as a Master's rather than collect credits (there were only 1,650 such students enrolled in 2004³⁵). However, the number of international students enrolled on complete programmes (in English) has been rising in recent years as more programmes are being provided as Sweden aligns its higher education system to the Bologna three-cycle model.

It is difficult to gain robust data about the nationality of international students studying in Sweden because Swedish institutions are not permitted to ask for data about nationalities of their students. In practice this information is often inferred from whether or not they have a Swedish registration number, although the data is not comprehensively or systematically collected (especially for free movers), shown by the fact that in 2006/7 5,203 students were classified as 'origin unknown within Europe'. In total Sweden appears to attract most of its international students from four countries (Finland, Germany, France and China).

²⁸ See Gardner (2009) and Gardner (2008a) for a fuller discussion of these issues.

²⁹ See Gardner (2008b) for more details.

³⁰ This figure includes both students from abroad (21,800) and those resident in Sweden but with a foreign background (i.e. non-Swedish heritage).

³¹ The Högskoleverket annual report (Högskoleverket (2008a)) provides more detail on international student data.

³² Carlsson et al., op cit.

³³ The Högskoleverket report (Högskoleverket (2008b)) provides fuller details of the survey findings

³⁴ All HE in Sweden is offered in the form of courses, which vary in length (from five to 20 weeks) and which can be combined together with a great deal of flexibility to form an educational programme, such as a Master's degree.

³⁵ See Statens Offentliga Utredningar (2008) for more details.

However, 80% of exchange students compared with 50% of free-movers come from the EU/EEA so looking at international students in Sweden in total conceals the different source countries for different types of students.

Finland is an important source country due to its proximity and national co-operation activities, whilst France and Germany are significant sending and receiving countries in the mobility market. Norway and Denmark are also major sources of free movers in Europe, whilst outside the EU/EEA the largest numbers of students come from China, Pakistan, India, Iran and Bangladesh, and China is also a significant (and growing) sender of exchange students. 30% of all free movers enrolled in Sweden 2006/07 (just over 5,000) were from Asia a rapidly growing source market for Swedish HE. The main subject areas which attract 'free mover' international students in Sweden are technology, business, social sciences and natural sciences. The Swedish Institute reports a growing number of PhD researchers currently from over 80 countries, which may be because in Sweden the university has to arrange financing by employment or grant.

In 2006/07 there were 25,600 Swedish students studying abroad (compared with 28,664 in 2002/03), around 20,000 arranging their own studies and 6,000 participating in exchange programmes. The UK and the USA were the largest single host countries with other popular destinations being Spain, Denmark, Australia, France and Germany. The proportion studying in Asia is increasing and is now 7%. During 2007, just over 1,000 doctoral students travelled abroad to take part in exchanges lasting at least three months. At the same time, Sweden was the host country for just over 800 doctoral exchange students. Just over half the exchanges in both directions took place with an EU country although a considerable number of doctoral students participated in exchanges with the USA.

Netherlands

Given the relatively small size of its higher education sector the Netherlands recruited an impressive 70,000³⁶ international students in 2008/9 (comprising 12% of all students). The Netherlands doubled its international student population between 2000 and 2005 and international student numbers continue to grow. In 2008/09 the Netherlands had 33,000 full-degree international students from the EU/EEA, 17,850 non-EU/EEA full-degree international students, and 7,250 international exchange students. In the same year 70% of international students with known nationality were from the EU/EEA. Whilst 22% of the 44,781 foreign students in public institutions were Master's students, 77% were studying at Bachelor's level and only 1% at post-Master's level. Dutch HEIs recruit significant number of international students on applied English-language Bachelor's programmes. Several Dutch HEIs are very strong in science and technology fields. In some subject areas at least half of the number of Master's students consists of international students, while in PhD positions this is sometimes as high as 80% (on average between 35% and 60% of PhD students are from abroad).

Dutch universities are popular with international students because of the large numbers of English language programmes, (until recently) relatively low fees, institutions' multi-national student bodies and international outlooks, as well as highly practical teaching approaches (e.g. the problem-based group orientated approach used at the University of Maastricht). Research in the Netherlands has shown that international students choose the Netherlands because of the academic quality and the cosmopolitan atmosphere³⁷. Dutch universities have also been engaged in international student recruitment for many years and began to adopt the Bologna model earlier than many other countries.

An internship/period of work practice is a compulsory part of many Dutch HE programmes and this is often attractive to non-EU/EEA students. The major source countries of international students (both diploma and credit mobile) enrolled in Dutch HE in 2008/9 were Germany (19,750 students), China (5,000), Belgium (2,500), Spain (1,950) and France (1,650) although different institutions attract different proportions of international students (e.g. some of the newer universities are more EU focused). Of all international non-EU/EEA students in the Netherlands, the largest group is from China, Indonesia (1,350 students), the USA (1,300), Turkey (1,100), and Surinam (600).³⁸ US students are attracted by the perceived high quality of Dutch HE and the country's low living costs whilst the Netherlands has social and cultural links with Indonesia, Turkey and Surinam.

³⁶ See Nuffic (2009) for more detailed data on internationalization in the Netherlands. The 76,000 figure includes all types of diploma and credit mobile students. Excluding inbound credit mobile students (outside exchange programmes) the figure is 58,100.

³⁷ See Nuffic (2008) for more details.

³⁸ Nuffic (2009) op cit.

In 2008-09 there were 44,350 Dutch students studying abroad (20,450 excluding 'other credit mobile' students) including 11,850 in the EU/EEA, 2,900 outside the EU/EEA and 5,700 exchange students. Most go to other European countries with the UK receiving the largest group (4,550 students in 2007-08). The Netherlands spends €2.5 million on scholarships for Dutch students studying outside the Netherlands, with more than half of Dutch students at foreign universities receiving scholarships from their government or from international funding bodies³⁹.

Strategic Approaches to Internationalisation

In recent years, many national governments and government agencies worldwide have begun to develop national level co-ordinated approaches to the international activities of their higher education institutions. In some countries, national governments have significant control over institutional higher education activity, whilst in others there is substantial decentralisation and institutional autonomy. However, in most countries there is a strategy which outlines national-level objectives related to international higher education and the policies that will help achieve this. All of the four comparator countries have developed an overall strategic approach to internationalisation and international student mobility, although the particular approach adopted varies according to public policy objectives in each country and its position in the international student recruitment market. An analysis of the internationalisation strategies in each country is provided in Table 2.

Table 2: Strategic Approaches to Internationalisation by Country

	Strategic Prioritisation	National Investment	Institutional Activity	Key Strategic Challenge
Denmark	Strong	Limited	Limited	Institutional finance to support internationalisation
Germany	Strong	Medium	Limited	Alignment with Bologna & Lisbon agendas
Sweden	Strong	Limited	Limited	Institutional finance to support internationalisation
Netherlands	Strong	Medium	Strong	Institutional finance to support internationalisation

National international education strategies have sought to respond to these flows in a number of ways. Prior to the 1990s, within Europe, national mobility strategies were mainly driven by academic rationales, and a desire to cooperate for mutual benefit and to support educational and socio-economic development. Policies included free tuition and scholarships for overseas students (including support for living costs), financial support for student exchange and study abroad partnerships. Although these rationales persist, European governments are increasingly focusing on the financial and economic benefits of increased student mobility, both for institutions and for national socio-economic development. Many governments have identified increasing mobility as a key factor in developing national competitiveness in a global knowledge economy, through promoting skilled migration of students and staff, enabling students to pursue valuable overseas study and work experience opportunities, and supporting research collaboration with high-quality overseas partners.

Many countries are also now actively seeking to increase their share of the international student recruitment market, particularly the recruitment of students outside the EU and EEA who are eligible to be charged higher fees. Institutions in some countries (e.g. the Netherlands) already rely on international enrolments to populate programmes in key disciplines (e.g. Science, Engineering, Technology and Mathematics (STEM) subjects), and demographic trends suggest that a number of European countries (especially Germany) will experience a decline in home student enrolments in the near future, meaning that they must also actively seek students from overseas.

There has also been a reduction in the amount of public funding per student in higher education in most European countries combined with government encouragement for institutions to generate additional sources of income. National governments are becoming less willing to subsidise students from outside the EU/EEA and the introduction of tuition fees for such is a relatively new and sometimes controversial development in many European countries. The fee income from international students in most European countries is usually only aimed at covering the cost of recruiting, teaching and supporting students rather

³⁹ See OBHE (2006a) for more details about these scholarships.

than making a profit (as in the UK). National governments expect institutions to use this additional income to improve the quality of their education provision, facilities and student support services, all of which have been identified as key factors in attracting international students⁴⁰ and developing institutions' reputations internationally.

National strategies and policies within Europe tend to support both cooperative and competitive approaches to increasing student mobility. Cooperative approaches are based on encouraging mobility through overseas partnerships whilst competitive approaches focus on improving the attractiveness of the national education sector to international students, often in direct competition with other countries. In many cases a national higher education brand has been developed to help institutions market themselves and their programmes overseas, whilst in some countries significant funding has also been provided to help institutions attract students (e.g. by establishing overseas offices in key countries) and to develop programmes aimed at overseas students (e.g. Germany and the Netherlands). In many European countries there is also a national policy to support and encourage institutions to develop English-language provision designed to help recruit international students and to provide home students with the language skills to help encourage greater mobility. Some countries also provide recruitment incentives to international students, such as scholarships and grants, and the ability to work during and after study.

Denmark

In 2004 the Danish Ministry of Education and the Ministry of Science, Technology and Innovation (MSTI) published a policy paper⁴¹ that provided a detailed plan for enhancing the internationalisation of Danish education and training at all levels. The paper outlined a strategic approach which was aimed at ensuring that the Danish education sector remained internationally competitive and able to participate in the global knowledge economy in the future. It contained a number of strategic objectives to achieve this, including: internationalising the curriculum content of study programmes (including more English-language programmes); promoting the outward mobility of Danish students; attracting more overseas students to Denmark; developing institutions' use of e-learning internationally; and promoting overseas collaboration and cooperation with overseas institutions (in Scandinavia and beyond), and international agencies and networks (e.g. in China)⁴².

In 2006, this plan was superseded by a more ambitious government-wide globalisation strategy⁴³ which focuses on enabling Denmark to maintain its position as a competitive force in the global economy whilst ensuring that social coherence is promoted through the welfare system. This includes upgrading skill levels, improving education attainment, and intensifying links between universities and industry. To support this strategy the Danish government is focusing on collaboration between Danish and other Scandinavian universities and the rest of the world and there are plans to increase public sector research funding to around 1% of GDP to help improve research outputs. This is linked to the Lisbon agenda target of research funding comprising 3% of GDP – the other 2% is expected to come from the private sector. These measures are designed to ensure a higher profile in global research in order to enable the country to attract talented international students and researchers⁴⁴.

In 2007 the Council for Internationalisation of Danish Education was established and given a range of objectives including: expanding the number of higher education programmes offered in English; ensuring that Danish students acquire global and intercultural competences and skills; making Danish education and institutions attractive to foreign students and foreign teachers; and assisting Danish educational institutions to develop professional environments able to attract talented staff globally⁴⁵. A research project⁴⁶ undertaken for The Danish Agency for International Education in 2006-07 suggested that Denmark has the potential to generate a significant economic impact from non-EU/EEA international student recruitment and attracting skilled overseas students to study and work in Denmark and recommended a number of policy approaches that could achieve this. The Danish Council for Research Policy recently proposed that the

⁴⁰See International Graduate Insight Group (2008)

⁴¹Ministry of Education and the MSTI (2004)

⁴²In 2008, the Ministry of Science Technology and Innovation produced a strategy on knowledge-based collaboration between Denmark and China and has recently announced the establishment of a Danish University Centre in Beijing.

⁴³The Danish Government (2006)

⁴⁴See Slattery (2009) for more details about these measures.

⁴⁵Carlsson et al., op cit.

⁴⁶Rogers and Kemp (2007)

number of foreign PhD students in Denmark should be raised from the present 7% to 20% of the total Ph.D intake⁴⁷.

Denmark's strategic approach to internationalisation is aimed at ensuring that the Danish education sector remains internationally competitive and able to participate in the global knowledge economy. Increasing the level of international student mobility can help enhance the international dimension of Danish campuses, provide opportunities for Danish students to gain overseas experience, and will also help to attract talented students from overseas who can contribute to Danish socio-economic goals. The Danish higher education sector is not focused on the potential revenue-generation of international student recruitment, nor is it hoping to provide programmes designed solely for international students. However, it is seeking to reduce the tax burden on Danish taxpayers, and reducing expenditure on education for non-EU/EEA students fits into this policy.

Danish institutions are encouraged to develop their own internationalisation strategies and to make these publicly available. It is expected that internationalisation initiatives will be evaluated and data on student mobility and other indicators will be collected systematically so any progress can be measured. Institutions are also encouraged to engage in provision of E-learning, either on their own or through consortia⁴⁸. So far, what has been lacking in the Danish internationalisation and globalisation strategies is support for collaborative partnerships with overseas institutions, a likely future growth area.

Germany

As in Denmark, Germany's national strategic approach related to international student mobility is integrated within the country's international trade, cultural and international development and co-operation policies which focus on enhancing global competitiveness in research and skilled manpower. Germany began a drive to internationalise its tertiary sector in the mid-90's which is focused on enhancing the international reputation and attractiveness of German higher education and developing a 'European dimension' within the sector.

A key aspect of Germany's internationalisation strategy is to increase the number of foreign students studying in Germany and encouraging German universities to operate abroad. Germany's rationale for increasing international mobility is firmly based on a skilled migration approach, and employers are major stakeholders in developing policies related to student recruitment. The expansion of overseas recruitment has a postgraduate and research focus, based on small enrolments in specialist subjects. This is a broadly non-commercial agenda compared with the approaches in the UK and Australia for example.

The German Federal Government has developed a range of policy mechanisms with significant funding attached to promote and support increased inward student mobility. The policy mechanisms are designed to both counter the projected difficulties in recruiting sufficient home students in the coming decade due to a declining birth rate, and to recruit 'the best' international students. It has developed a target that 10% of all students in German higher education should be international and believes that German universities have the capacity to recruit more international students than is currently the case.

There are some concerns that the German higher education sector is less than enthusiastic about implementing structural reforms and the internationalisation agenda although in recent years the Federal government has begun to assist German universities in their attempts to become more internationally competitive and attractive to potential international students through providing financial support to high-quality institutions via the 'Exzellenzinitiative', described below in Example 1.

⁴⁷ op cit.

⁴⁸ See OBHE (2004a).

Example 1: The 'Exzellenzinitiative' in Germany

The 'Exzellenzinitiative', introduced in 2005, aims to promote excellence across all areas of research, from infrastructure to human capital. The Federal Government and German Research Foundation report that the initiative alone will inject €1.9 billion into the German higher education sector by 2012⁴⁹. The Federal government has designated six institutions as 'elite research universities' along with 21 graduate schools and 20 Excellence Clusters (centres of research excellence at individual universities) and provided them with additional funding to help them improve their positions in global rankings⁵⁰.

Sweden

In the last ten years the Swedish government has adopted a more strategic role in the promotion of internationalisation of higher education. Internationalisation is one of the key goals in the annual government directives for higher education institutions and includes a broad range of policies related to increasing the international content of programmes, collaboration with other Nordic countries, and in Asia, Europe and Russia, and encouraging staff exchange and outward mobility of Swedish students.

Recent policy documents have called for an increase in the number of international students in Sweden (particularly from students outside the EU/EEA), as well as promoting other elements of internationalisation in higher education institutions including the development of partnerships and networks which encourage the exchange of staff and students, the support of Swedish students studying overseas, developing programmes (and students) that are global in outlook, and to raise the quality and global reputation of the higher sector in general.

The 2001 Higher Education bill stated that "a greater number of foreign students should be recruited to Sweden in order to increase the quality of higher education and to encourage international and cultural understanding", and also charged individual institutions with increasing international mobility, internationalising the content of programmes and promoting an "understanding of other countries and international conditions"⁵¹. The 2005 New World – New University bill on higher education emphasises the value of an internationally 'open' Swedish HE sector, and stressed the importance of strengthening the global attractiveness and competitiveness of Swedish HE. This report also set out the following priority areas for internationalisation in Sweden: periods spent abroad by Swedish students, teachers and other staff, internationalisation at home, recruitment of students from other countries to entire programmes in Sweden and international collaboration.⁵² Recent annual directives issued by the government to HEIs have also focused on encouraging various aspects of internationalisation including increasing mobility onto Swedish courses and programmes, improving the amount of English-language provision, increasing partnerships and collaboration with overseas institutions and increasing outward mobility.⁵³

A 2005 government study of Swedish HEIs' internationalisation activities reported that "higher education in Sweden is shifting from internationalisation where the emphasis has been on student mobility – and its extent – to strategic institutional cooperation [...with] the focus afforded to academic collaboration and its inclusion of research collaboration as well as teacher development and academically well organised student exchange".⁵⁴ The main findings include a significant increase in overseas enrolments and a decline in the number of Swedish students studying abroad. It found that HEIs are increasingly thinking beyond enrolling more international students on courses and programmes, to developing partnerships with other institutions or networks, collaborating in staff/student exchanges and research. However, the report also suggested that although Sweden has made substantial progress in internationalising higher education a more 'sustainable' approach may be required (e.g. introduction of tuition fees for students outside of the EU/EEA) in a context of declining public funding and growing overseas enrolments.⁵⁵

⁴⁹ See Europe Unit (2009)

⁵⁰ For example, between 2007 and 2011 the Technischen Universität München will receive €114m to enhance its international competitive.

⁵¹ Swedish Government Website. URL: <http://www.sweden.gov.se/sb/d/2034/a/21540>. Last accessed 22 September 2008; and URL: <http://www.regeringen.se/content/1/c6/02/15/40/74807ef2.pdf>, p.7.

⁵² Högskoleverket (2005), p.16.

⁵³ Ibid, p.17.

⁵⁴ Ibid., p.27.

⁵⁵ See OBHE (2005a) for more information.

Although committed to both 'internationalisation' and 'Europeanisation' the Swedish government has separate policies and goals related to its engagement with the European and international policy agendas, focused mainly on the differing impact of international student recruitment and tuition fee income. The Swedish government considers that engaging with the Bologna process and the Lisbon agenda can contribute to its goal of achieving an internationally competitive higher education sector that is attractive to international students. In July 2007, the country introduced a range of structural reforms including the development of a three-cycle degree structure, the development of new degree descriptions, aligning the credit system with the ECTS, a new qualifications framework, and the provision of Diploma Supplements for all programmes (including doctoral programmes). Sweden has also recently introduced a new two-year Master's degree (Masterexamen) alongside the one-year (Magisterexamen). This new two-year degree is more research-based and designed to provide students with credits to contribute to further study (i.e. a PhD). In addition, Sweden ratified the Lisbon convention in 2001 and has signed up to the Schengen agreement to allow greater freedom of travel in member countries and is a member of the ENIC-NARIC network of national centres aimed at improving academic recognition of diplomas in the EU/EEA.

Individual universities in Sweden also have their own approaches to internationalisation and the approach taken by Linköping University is described in Example 2. The 2005 Högskoleverket survey provides an overview of the internationalisation activities undertaken by responding institutions, and puts forth a series of recommendations to facilitate further developments in this area. Survey respondents reported a wide range of internationalisation objectives and strategies. The overall trend is towards explicating more detailed internationalisation strategies, with the desired institutional outcome of (in order of priority): enhancing academic quality; training students to work in the global economy; and bolstering programme and research competitiveness.⁵⁶

Example 2: Internationalisation Strategy at Linköping University in Sweden

In Sweden, at Linköping University the SAINT (Strategy Group for Internationalisation) has oversight for the activities at the university level whilst the faculties have overarching responsibility for the activities that take place across the faculty and departments have a number of objectives designed to internationalise its activities with the goal of improving the quality of education and research. It is focused on attracting more international students and staff to help diversify the campus, internationalising programmes (in terms of developing international perspectives and awareness, language, etc.), and developing international networks for students, researchers and staff to help promote research and study abroad.

Netherlands

The Dutch government has had a focus on internationalising Dutch higher education since the mid-1990s, with a strong emphasis on increasing international student recruitment. In 1996, the Dutch Ministry of Education published a policy paper which asked Dutch universities and other higher education institutions to actively recruit non-European students, and permitted them to charge full or differentiated fees. Previously non-existent or uniform tuition fees (i.e. foreign students paid the same amount as Dutch students) had provided little incentive for institutions to recruit more non-EU international students.

In 2006 Nuffic, the Netherlands Organization for Internationalization in Higher Education, published a strategic framework for internationalisation in higher education 'Enter Int!'. This tasks Nuffic with assisting Dutch institutions to internationalise through international student recruitment, curriculum reform, regional cooperation, and other forms of collaboration worldwide.

Dutch HEIs are currently focusing on attracting both more and 'the best' non-EU/EEA students. The Dutch government has developed a comprehensive and successful national level strategy related to international student recruitment, and it has implemented a range of policy measures designed to improve the Netherlands' competitive profile in the international market place. International students are becoming strategically important to the Netherlands, especially in science and technology subjects at Master's and PhD levels as there are not enough Dutch students studying these subjects. In some subject areas, at least half of Master's students are international students, whilst at PhD level this is sometimes as high as 80% (on average between 35% and 60% of PhD students are from abroad). At the institutional level, for example, the University of Maastricht's Strategic Programme 2007–10, recruitment activities concentrates on developing a professional recruitment approach and TNE initiatives.

⁵⁶ Ibid.

3. National Policy Responses by Key Themes

Marketing and Recruitment Strategies

Research has found that good quality information about prospective countries, institutions and programmes is a major factor in influencing international students' overseas study choices. All of the comparator studies in this study, as well as other countries worldwide (both major and emerging providers) have made recent moves to improve the quality of their marketing to prospective international students to boost their international student numbers. This includes developing a more strategic marketing approach through understanding market positioning, and developing national and institutional branding and the 'pull' factors which attract students to study in a particular country or region⁵⁷. A summary of the national level marketing approach in each of the comparator countries is provided in Table 3.

Table 3: National-level International Marketing Strategies

	National Agency	National Brand	Key National Activities
Denmark	The Danish Agency for International Education	Study in Denmark	National branding and marketing.
Germany	The DAAD	Study in Germany	Collaborative recruitment and admissions portal
Sweden	Swedish Institute	Study in Sweden	Promotion of English-language provision, centralised admissions portal
Netherlands	Nuffic	Study in Holland	Code of Conduct for care of international students. Network of overseas offices.

Denmark

The Danish government has realised that the country requires a more professional approach at institutional and system level and that there is a clear need to better understand the global market. Therefore, in cooperation with higher education institutions and relevant government bodies, The Danish Agency for international Education has developed a national strategy for promoting Denmark as an attractive study destination. This strategy outlines the Danish approach to international student mobility which seeks to enable the Danish HE sector to respond to the challenge of increasing international student recruitment in a context where the introduction of tuition fees for non-EU/EEA students has had an initial negative impact on recruitment of these students.

The strategy focuses on increasing the recruitment of the most able international students to Denmark to help improve institutional quality and to help meet the needs of the Danish labour market. Its key areas of activity include: marketing Denmark as study destination, providing information and guidance to prospective international students, supporting institutional activities through disseminating information and research findings, and working with key stakeholders to help remove barriers to student mobility. Key initiatives include: developing a national education brand, creating an information and guidance website for prospective students, the future development of a code of conduct for overseas recruitment, and representing the Danish education sector overseas at conferences and recruitment fairs. Recent research for The Danish Agency for International Education has highlighted that since the Danish HE sector has relatively limited experience in marketing to international students it may need a significant amount of government funding to help develop capacity⁵⁸. This is the case in the comparator countries, except perhaps the Netherlands, so there is a clear opportunity for Denmark to gain competitive advantage in this area.

Germany

⁵⁷ See Altbach et al. op cit, ACA (2006), and Mazzarol and Soutar (2002) for a fuller discussion about push and pull factors and student perceptions of overseas study destinations.

²⁶ Rogers and Kemp, op cit.

In cooperation with the Federal Government, the Deutscher Akademischer Austauschdienst (DAAD), Germany's agency for the support of international academic co-operation, organises targeted overseas recruitment campaigns, organises international student scholarships, funds German HEIs to enhance their international student support activities, co-ordinates international admissions (via uni assist), encourages German HEIs to organise international 'summer universities'⁵⁹ and provides funding for transnational education provision overseas.

In 2008, the Centre for Higher Education Development Consult (CHE Consult) published 'Analysing the Future Market – Target Countries for German HEIs'. This report made recommendations as to how overseas recruitment could help the German higher education sector meet future demographic challenges and the measures are required to improve Germany's attractiveness to international students, based on case studies of five key overseas markets: China; Bulgaria, Turkey; Brazil and the USA (Brandenburg and Carr, 2008).

International recruitment activities in Germany are carried out through various initiatives connected to the 'Joint Initiative on International marketing to promote study, research and training in Germany' launched in 2001, which includes collaborative marketing via GATE Germany described in Example 3 below.

Example 3: GATE Germany – Collaborative Marketing activity across German Institutions

GATE Germany (a collaboration between the DAAD and the Rectors' Conference) is part of the Joint initiative on international marketing to promote study, research and training in Germany launched in 2001. It has around 120 member universities and its main activities include the promotion of German education abroad as well as the training of international and marketing officers at German institutions. GATE is represented at a range of events across the world each year.

The DAAD has allocated significant Federal government funding to promote student mobility in Germany. For example it supports 52 German overseas offices that are focused on attracting international students and administering scholarship programmes. These offices are also designed to gain in-country knowledge, build connections between German and international universities, and to facilitate institutional student recruitment campaigns. DAAD's Strategic Programme for the period between 2008-2011 suggests that it plans to allocate more and more attractive scholarships for international students.⁶⁰ DAAD has also initiated a project to help German HEIs to place information about their course programmes online (aimed at Russian students) and in 2006 established a German academic test centre in Hanoi to assess the quality of Vietnamese applications to German HEIs. In 2009 DAAD began a joint initiative with the Federal Ministry of Education and Research (BMBWF) called 'A New Passage to India', involving the allocation of €4.3 million in funding. The Federal Government is also considering the use of private education agents to assist in attracting international students to Germany.

At the institutional level Becker et al (2009⁶¹) suggest that a minority of German higher education institutions have so far implemented a full internationalisation strategy, although some have plans to do so. Most German institutions target particular countries or regions, and subject areas in which they are likely to attract high quality international students.

Sweden

The Swedish government is becoming more focused on the active and targeted recruitment of international students to Swedish institutions, in preparation for the planned introduction of fees for non-EU/EEA students. There is a strong focus on recruiting students on to 'complete' Master's degrees, and growing the number of internationally marketable English language programmes, particularly in Asia. The 2001 Higher Education Act encourages institutions to actively recruit students from abroad, and the 2005 New World – New University bill facilitates the international recognition of Swedish qualifications, using the framework of the Bologna Process. The Swedish higher education sector expects that the introduction of tuition fees in Sweden will lead to a more coherent international student recruitment strategy at national and institutional levels.

⁵⁹ These are aimed at experienced international students seeking to lecture or undertake research in Germany.

⁶⁰ See DAAD (2008) for more details.

⁶¹ Except where specified, references to institutional initiatives in Germany, Sweden and the Netherlands in this report are based on information from the 2009 report produced for the UK International and Europe Units by the OBHE and Kingston University (with contributions from the author). See: OBHE and Kingston University (2009).

The Swedish Institute has responsibility for attracting students to study at universities and colleges in Sweden and to help support institutions' own marketing efforts. The Institute's main marketing activity is managing the 'StudyinSweden.se' website, a government-funded English-language information resource for prospective international students that was created in 2003. This web resource provides a database of English-language Master's programmes, information about Sweden's universities, information about application procedures, scholarships, visas, accommodation and resources for learning Swedish as a foreign language. There is also an internet-based centralized applications portal, 'Studera.nu'. In addition, the Swedish Institute also administrates around 150 scholarship programmes for international students and researchers at Swedish universities or university colleges each year, many of which are tailored for students in the Balkan and Baltic regions, the Ukraine, Belarus and Russia.

Swedish institutions themselves are becoming more active in international marketing activities including participation in overseas education fairs (e.g. the European Higher Education Fairs in Asia) and marketing tailored Continuing Personal or Professional Development (CPD) programmes to international businesses and organisations. Since Swedish institutions receive a government subsidy per student the recruitment of international students can help them to generate additional income, and ensure the continuation of programmes in which there is demand from international students, but where demand from Swedish students is not strong.

Netherlands

In recent years the Dutch government has developed a comprehensive national level strategy related to international student recruitment designed to boost the Netherlands' international competitiveness in higher education. International students are becoming strategically important to the Netherlands, especially in science and technology subjects at Master's and PhD levels where higher education institutions are unable to recruit enough Dutch students. Although the country's international student population doubled between 2000 and 2005, Dutch HEIs are focusing on attracting both more and 'the best' non-EU/EEA students.

In some subject areas at least half of the number of Master's students consists of international students, whilst at PhD level this is sometimes as high as 80% (on average between 35% and 60% of PhD students are from abroad). However, despite Dutch institutions' success in international student recruitment the Dutch government believes that there is scope for a significant increase in international student recruitment.

The Dutch government provides significant funding to support international student recruitment activities. It has funded the implementation of a range of policies in recent years to boost international student recruitment through Nuffic (The Netherlands Organization for International Cooperation in Higher Education) which coordinates national level internationalisation activities in the Netherlands. Nuffic has also developed a logo to be used in promoting Dutch HE abroad with the tagline is 'Study in Holland: open to international minds'. The brand can be used by higher education institutions who are accredited by the Netherlands-Flemish Accreditation Organization (NVAO). They must also have signed up to the Code of Conduct, which is a set of minimum standards for the teaching and care provided to international students in the Netherlands. In 2008 the Dutch government announced that the name 'Universities of Applied Sciences' (UAS) to refer in English to institutions offering profession-oriented study programmes, whilst universities focusing on pure academic learning and research will continue to be known as Research Universities. This represents an attempt to distinguish between academic and profession-oriented learning for the benefit of overseas students (Eurogates, 2008).

In 2001 Nuffic established the first Netherlands Education Support Office (NESO) and there are now seven such offices in six key target countries, including China, Indonesia (two offices), Mexico, South Korea, Taiwan and Vietnam, as well as a 'Study in Holland Desk' in India. The 'Study in Holland' branding was launched in January 2008. The NESOs are intended to promote Dutch HE in different world regions, enhance co-operation between Dutch and foreign HEIs, and to undertake market analysis and development. The Dutch government is currently planning to establish further NESOs in Brazil, Russia and Thailand. Dutch HE is also promoted abroad through research and teaching at ten Dutch academic institutes that are located in countries around the Mediterranean. In addition, the Dutch government has recently allocated €5 million to Dutch institutions on a competitive basis, designed to enhance the quality of selected internationally oriented Bachelor's and Master's programmes. In 2006 the Dutch government introduced a scholarship programme for high-quality international students aiming to study in the Netherlands and for Dutch students who like to study abroad.

At the institutional level, individual institutions have developed their own marketing and recruitment strategies designed to help them to recruit more international students, and the University of Maastricht's approach is described in Example 4.

Example 4: The University of Maastricht's Strategic Approach to International Recruitment

At the University of Maastricht international student recruitment has become more coordinated and strategically oriented over the last 10 years. The University's Strategic Programme 2007–10 identifies seven target countries for international recruitment: Germany, Belgium, the UK, Poland, Turkey, China and India. By 2010, the University hopes to recruit 3,100 Bachelor's and 2,750 Master's students in total each year. It has a target that 30% of Bachelor's students will be international students (20% of these from outside the EU/EEA), and 35% of Master's students originating from other EU/EEA countries and 15% from outside the EU/EEA. At both institutional and faculty levels the university has developed targeted recruitment activities to attract international Bachelor's and Master's students. At a central level, international student recruitment is organised in country teams and the University will soon open a student recruitment office in Bangalore, as well as an India and a Turkey Institute at its Maastricht campus. Each faculty has its own international office, which is in charge of all incoming and outgoing exchange students, as well as a marketing and communications office which is responsible for student recruitment. As well as increasing international student recruitment through developing a distinctive portfolio of internationally-oriented degree programmes and professionalised recruitment practice, the University is also seeking to improve the quality of its information, guidance and support for international students, and conducts online surveys with international students to seek to understand their experiences.

Dutch universities are also targeting the Indian market collaboratively, and six Dutch HEIs are co-operating in international recruitment through the Holland Education Consortium (HEC) (established in 2006) which they hope will provide them with combined expertise and resources to recruit more highly qualified international students at a lower cost, e.g. via streamlined representation at international fairs and shared marketing materials and a joint information portal⁶².

Student Finance and Tuition Fees for International Students

Recent research both in Denmark and elsewhere⁶³ has highlighted that financial considerations, especially the existence and level of tuition fees and associated living costs (often affected by fluctuating exchange rates), are an important factor in international students' decision making regarding their country of study especially for more 'cost aware' students. The recent decline in the share of the international student market of the UK and the USA may be partly attributed to high tuition fees in the face of competition from other Major English-speaking Destination Countries (MESDCs) (especially Australia) which provide comparable study opportunities at a lower cost. In addition, the current global economic downturn and the fact that other 'emerging' recruiting countries in Europe (including the comparator countries) and Asia (e.g. Singapore and Malaysia) are becoming increasingly competitive in areas such as tuition fees, living costs, student support and English-taught provision which are only likely to become more important in the future.

However, factors such as tuition fees, living costs, financial support and work regulations are not considered by international students in isolation, but rather as a whole 'international study package' that influences their value for money perceptions. There is some evidence⁶⁴ that perceived quality and employability are the most important factors in student choice (and are important 'pull factors'), high costs and low affordability do not necessarily discourage students willing (and able) to commit the necessary resources if they can be sure that they will gain a return on their investment. However, when choosing between similar educational opportunities, cost considerations may play a role, especially for students from developing countries or those with more limited funding available. In such cases 'alternative' destinations with lower costs (i.e. low or non-existent fees, or a low cost of living) may in fact be more realistic destinations students who might otherwise have chosen to go to the MESDC countries⁶⁵.

Although full cost tuition fees for 'international' students have been in place for many years in the MESDCs (except for EU/EEA students in the UK), it is only in recent years that a growing number of European countries have developed policies which require higher education institutions to introduce fees for students

⁶² OBHE (2009c), op cit.

⁶³ See ACA (2006) op cit, Bohm et al op cit, and International Graduate Insight Group op cit. for a fuller discussion of these issues.

⁶⁴ See Santiago et al, op cit and Lasanowski (2009)

⁶⁵ Ibid.

outside the EEA and in some cases for 'home and EU' students. The rapid expansion of tertiary education in many countries has placed financial pressures on education systems, and the revenue generated from recruiting international students is now a vital income stream for many higher education institutions in a context of frozen or reducing public funding (as a proportion of GDP) and increasing enrolments. In the UK, Australia and New Zealand in particular, institutions have been required to operate more entrepreneurially to survive, there is a significant financial incentive to recruit more international students and they view themselves as operating in an international student 'market'. In addition to the human resource, political and cultural benefits of recruiting international students, countries (and institutions) also derive financial benefits (export revenue) from the presence of such students either directly via differential fees income or indirectly through the wider trade benefit to local economies through the associated spending of international students. Quantitative analyses in the UK, the USA, and Australia have demonstrated that international education can contribute significant sums to national economies⁶⁶.

In countries which do not charge international students any fees, the high unit costs of higher education mean that international students represent a significant cost. Countries which charge their international students the full cost of education are more competitive, and those which charge above-cost fees are able to generate significant trade benefits which can boost the financial resources of tertiary educational institutions and contribute to the financing of the education system. Institutions in the MESDCs tend to charge above cost fees, and emerging recruiting countries in the Asia-pacific have made international education an explicit part of their socio-economic development strategies and have developed policies based on attracting international students on a revenue-generating or at least self-financing basis⁶⁷. In countries where differential fees have been in place for some time, institutions have developed costing mechanisms that enable them to adjust their fee levels according to market demand, and to use fee discounts strategically.

In the USA international students pay the 'out of state' rate for fees (which also apply to US students who are not state residents). US fees vary considerably between institutional types and range from €1,400 to €14,000 a year. In New Zealand fee levels range from €8,000 to €11,000 per year for undergraduate programmes to €11,000 to €20,000 for postgraduate (taught) programmes. In Canada fees levels are lower.

However, in most European countries the fees level is relatively low and either full cost or below cost (except in the Netherlands and the UK) although in some cases there are plans to increase the fees level when the market will bear this, whilst in others there are only plans to apply inflationary increases' to tuition fees and not to charge differential or 'above cost' fees to international students for commercial gain or cross-subsidisation of other activities. Most European higher education institutions rarely charge full cost tuition fees (except for some highly-rated MBA programmes). A summary of current undergraduate tuition fees for non-EU/EEA students, scholarships and living costs is provided in Table 4.

Table 4: Tuition Fees, Scholarships and Living Costs for Non-EU/EEA Undergraduate Students

	Non-EU/EEA Undergraduate Tuition Fees	Scholarships for non-EUA students	Estimated Living Costs
Denmark	€6,000 to €16,000 per annum	Limited. Institutional level.	High - €900 per month
Germany*	€1,000 per annum	Very limited. Mainly institutional and some at national level.	Medium - €770 a month
Sweden	None but planned for 2011 (around €6,700-€7,700 per annum)	Planned. Limited number at national level.	Medium - €700 a month
Netherlands	€5,000 to €9,000	Widespread and targeted. National and institutional	High - €850 per month

* In Germany, all students are also required to pay a small Semester Fee (Semesterbeitrag) each semester. This fee differs across institutions but is generally in the region of €100-€200 or €200-400 per year

⁶⁶See Lenton (2007) and IIE (2008) for example.

⁶⁷ OECD (2008), op cit.

Since many European countries are relative newcomers to the international education 'market' the 'brand value' of a degree in each country is not yet established and the long-term returns to a student's (or their financial supporters') investment in international education depend on how international degrees are recognised and valued by local and international labour markets. All stakeholders are seeking value for money, and this value needs to be demonstrated over time.

For most institutions in mainland Europe the motivation for increasing international student recruitment is not to generate a profit. The additional revenue generated via fees is designed to reduce the tax burden of such students on the taxpayer and to (hopefully) generate additional income to reinvest in the improvement of the quality of educational provision and student support services, all designed to help to attract high-quality students who can contribute to international and globalisation strategies. In Germany this is made explicit through the use of a separate hypothecated student services fee from all students which is a visible cost to students but demonstrates clearly that part of the overall fee is for student-centred services.

In countries where there is a national policy which requires higher education institutions to charge tuition fees this often acts as a disincentive for poorer students to study there. This is especially true for those students who do not have significant private or governmental funding sources to support their overseas study. Although little is known about the economic background of international students, Erasmus students are known to come from higher socio-economic groups, and other research⁶⁸ suggests that the majority of the growth of international student mobility in recent years has been amongst self-funded students (particularly at undergraduate level). Many students are unable to fund a full undergraduate degree programme overseas, and shorter study periods (for foundation programmes, top-up programmes, short courses, and taught Master's programmes) are often popular.

In some source countries (e.g. Malaysia) there are government scholarships for students studying overseas who benefit from knowledge and technology transfer when students return from their period of overseas study. In other countries, students are able to 'port' their government funding to support a period of study overseas (e.g. Chile, Denmark, Finland, Iceland, Netherlands, Norway, and Sweden). However, in many countries with developing HE systems there is significant non-state provision in higher education and students are accustomed to paying higher fees.

To guard against declining international enrolments, and to attempt to ensure that the best students are able to access their higher education systems (whatever their financial background) many countries have been paying close attention to providing financial support to international students (e.g. scholarships, bursaries and grants) to help ensure that international student numbers are maintained in the short to medium-term. This is particularly the case in countries who have either recently introduced fees or whose 'brand value' is not high. There are generally a small number of host-country scholarships, most of which are competition-based and awarded on merit rather than development focused (except in Norway and Australia), although they may be targeted at potential students in particular target countries or regions. Merit-based scholarships tend to be regressive since they simply reinforce the advantages of wealthy students from source countries⁶⁹. Governments and national-level organisations in the UK, Germany, France, the Netherlands and Switzerland offer such scholarships to international students. The German and Dutch scholarships are described below, and the French government, primarily through the Ministry of Foreign Affairs, funds 22,000 students each year through scholarships made available under bilateral assistance programs and student grants whilst the Swiss Federal Commission for Scholarships for Foreign Students (FCS) offers scholarships both on the basis of reciprocity (a fixed number of scholarships for each country) and non-reciprocity, although the organisation, through its scholarship scheme, particularly aims to attract students from Brazil, Chile, China, India and Russia⁷⁰.

In addition, individual higher education institutions in many host countries (particularly in the USA) also provide some kind of financial support for high-achieving international students, usually via a limited number of institutional scholarships or fee waivers, or grants from educational trusts. These are considered a good way to attract international students. Significantly most scholarships do not provide a living costs allowance and instead focus on providing a proportion of the fees cost (not always the full cost). Rogers and Kemp report⁷¹ that recent research by the company QS has suggested that partial fees are attractive to students and may in fact be more effective than full-scholarships since they enable more students to be supported (if

⁶⁸ International Graduate Insight Group, op cit.

⁶⁹ Santiago et al., op cit.

⁷⁰ OBHE and Kingston University, op cit.

⁷¹ Rogers and Kemp, op cit.

applied flexibly). At undergraduate and taught Master's level, students are accustomed to self-funding their overseas study (especially students from higher socio-economic groups) and thus value any kind of support, whether it be partial scholarships, employment opportunities or the availability of student loans. However, at the PhD or advanced research level, there is a greater expectation of more attractive scholarships, and employment opportunities and in some PhD/research institutions in the US around half of all international students receive some sort of scholarship funding whilst PhD students rarely pay fees, and are often employed as tutors or support staff. In New Zealand PhD students pay the domestic student rate (€1,400 to €2,800) and in Canada there are much lower fee levels for advance research students.

Denmark

In August 2006 Denmark became the first Nordic country to introduce tuition fees for non-EU/EEA students. The fee levels are regulated, and in principle must cover the cost of provision and universities cannot charge a fee set below the amount that they would have received if they were eligible for government funding (although this rule does not apply to the other HE institutions). As in many other countries with fees for non-EU/EEA students institutions are free to charge whatever fee they wish (so long as it is not below the minimum fee), and to charge differential fees between programmes. The proceeds from these tuition fees can be transferred to the institutions' general activities. In practice, there is considerable variety in the fees charged which range from €6,000 to €16,000 per annum, depending on what the market will bear and the above described limitations in terms of the minimum level. Danish students and EU/EEA students do not pay fees, and all Danish students that are living away from their parental home receive approximately €700 a month in government support for a maximum of six years. Many students also borrow money against attractive interest rates.

Danish institutions also receive a government grant of €700 per student for each exchange student (incoming and outgoing) for exchange periods of at least 3 months. Legislation in 2007 enabled Danish students to receive funding of up to €12,500 a year to cover fees, and to 'port' the funding attached to them enrolled in Denmark to an overseas institution. This is limited to study abroad periods at Bachelor's level and study abroad or full degree programmes at Master's level. There are also some limitations on the institutions the students can study at, with them in principle being 100 highly ranked overseas universities or those with which Danish universities already have exchange and other agreements. Danish universities will be asked to contribute to quality assurance during the study abroad period and assist with advice on practical arrangements, such as application processes, visa systems and accommodation abroad⁷².

The 16 Danish cultural institutions began charging tuition fees to non-EU/EEA students one year later than at other institutions. A limited number of full degree programmes are offered in English at those institutions, however, due to the more practical and individual nature of instruction provided at many of these institutions, international students without Danish language skills are also able to enrol in some of the full degree programmes.

Prior to the introduction of fees across the board, some Danish institutions (e.g. Copenhagen Business School, Niels Brock) charged tuition fees to students studying on programmes offered under the Open Education Act as income-generating activities to domestic, EU and overseas students, usually at continuing professional development level. Danish institutions are not very active in the 'commercial' study abroad market (in which many non-EU students pay relatively high fees), although Denmark's International Study Program (DIS) has provided study abroad options for international students (70% from the US private college sector) studying in Denmark for 1 to 2 semesters which recruits around 500 students a year (usually in their third or fourth year of study) paying around €11,400 a semester (including accommodation). The DIS is a not-for-profit educational foundation administered by a Board, appointed by the Government and Danish universities. In addition several short-cycle HEIs have offered English-taught programmes as income generating activity, and 70% of their students are from outside the EU/EEA. Fees for such programmes range from €8,700 to €9,200 per year.

As in other countries, the introduction of overseas fees is designed to both reduce the cost burden of such students to the Danish taxpayer, and to give Danish HEIs the autonomy to generate additional income (from above cost-price fees) to help them develop their international marketing activities, improve educational provision and student support services. The non-EU/EEA fee is regulated in the university sector and must cover the cost of provision (or what government funding would provide), although this is currently not the

⁷² See OBHE (2007) for more details

case in other institutions. In 2006 Rogers and Kemp undertook a cost-benefit analysis suggesting that the Danish economy might derive a gross addition of around €100 million per annum from the presence of non EU/EEA students (not including the value-added to the economy when some stay on to work as well as other non-monetary benefits).

The intention has been to use this additional income to enable Danish higher education institutions to internationalise (without extra government funding), recruit more international students and thus to become more internationally competitive rather than to make up for a shortfall in governmental funding through entrepreneurial activities. Danish higher education institutions are generally uncomfortable with developing more explicit international recruitment, fearing that they may be required to absorb a reduction in government funding and ultimately to charge fees to Danish and EU students⁷³. The current position of Denmark in the international recruitment market suggests that raising fees to much higher levels will not be possible in the short to medium term. Therefore, Danish institutions do not have much of a financial incentive to recruit more non-European students given that they will receive the same amount of income as they would from a European student, and that recruiting international students is a more complex and costly activity (unfunded by the Danish government). The Danish Agency for International Education research suggests that most Danish HEIs are most interested in recruiting exchange and full-degree students from Europe.

Reports also suggest that the relatively rapid introduction of such fees has resulted in a significant drop in non-EU student recruitment⁷⁴. This initial decline in recruitment was not unexpected since survey research undertaken by The Danish Agency for International Education⁷⁵ has shown that international students in Denmark have historically been most attracted by a combination of the lack of tuition fees and high quality provision, and that 44% of students (not paying fees) said that the absence of fees definitely influenced their choice of Denmark as a study destination. The same research found significant levels of private funding for international student and part-time work to support students' studies, assisted by home country or EU funding and small amounts of Danish scholarship support. The fees levels in Denmark are relatively high which means that students would expect a significant return on their investment in terms of the quality of the education that they receive and its value in the employment market.

In addition, there were few measures in place to lessen the impact of fees (e.g. a promotion campaign highlighting the quality of the Danish higher education experience, and the availability of scholarships). In 2004 a paper by the Danish Rectors' Conference encouraged Danish universities to initiate recruitment activities internationally and establish an enhanced pastoral care system for international students before the introduction of fees⁷⁶.

The Danish Agency for International Education research found that 86% of students who enrolled prior to the introduction of fees suggested that they would not have studied in Denmark if they had been charged a fee of €8,000 per annum. This suggests that potential students do not view the fee level as value for money compared with other similar countries (e.g. Germany and Sweden). In addition living costs in Denmark are higher than the European average (estimated at €900 per month) which adds to the overall cost of their study⁷⁷. Non-EU/EEA students also need to pay for the first semester of their studies in order to get a visa which could deter some students from poorer countries. However, should Danish HE institutions generate additional income from non-EU/EEA fees in the future they may be able to offer strategic fee discounts to particular groups of students or provide financial support for those students who may be deterred from studying in Denmark due to the introduction of fees. However, a higher fee level may also encourage potential students and parents to make a link between price and quality and, rather than opting for Denmark primarily on cost grounds (i.e. free tuition), the new system might create a better match between students' needs and abilities and institutional capacity in Denmark.

To compensate for the introduction of fees the Danish government has introduced a scholarship programme for non-EU students (worth €5.9 million a year). The scholarships are administered by the higher education institutions and can be awarded as full or partial tuition fee waivers and/or a monthly living cost allowance.

⁷³ Rogers and Kemp, op cit.

⁷⁴ See OBHE (2006a) for further details.

⁷⁵ Rogers and Kemp, op cit.

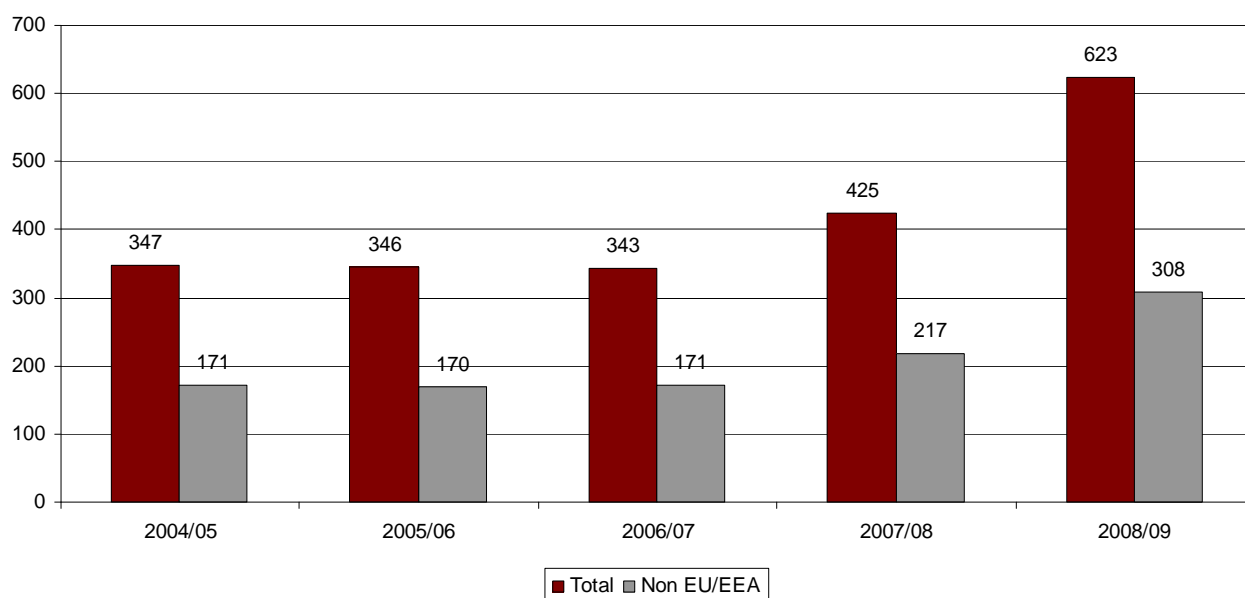
⁷⁶ See OBHE (2004).

⁷⁷ Rogers and Kemp, op cit.

At present, an estimated 53% of international students taking a Master's degree in Denmark leave the country less than a year after graduation⁷⁸. The Danish Agency for International Education research suggests that only a few Danish higher education institutions offer their own scholarships to international students⁷⁹.

In addition, exchange students from Europe can apply for grants via Erasmus, Nordplus and Tempus schemes, and via the Erasmus Mundus scheme, non EU/EEA students can apply for a scholarship to undertake specific Master's degree programmes offered jointly by a Danish institution and other European institutions. If students or researchers are from a country which has a bilateral agreement with Denmark, they can apply for Danish Government funded scholarships and in accordance with the Cultural Agreement Programmes and other scholarship exchange programmes, Denmark offers scholarships to nationals from 27 countries inside and outside the EU. The Danish national Development Agency (Danida) also supports students from developing countries on short courses and postgraduate study through paying their fees and associated living costs via the Danida Fellowship Centre.

Rogers and Kemp⁸⁰ suggest that at PhD or advanced research level it is difficult for self-funded international students to study in Denmark, since the funding via Danish Research Councils or the National Research Foundation are not well publicised. Some international students at advanced research level in Denmark are supported by EU programmes.



Figur 1: Amount of International Ph.d-students on a full-degree education in Denmark.

As figure 1 shows, 2008/09 had a significant increase in international Ph.d students enrolled in full-degree education. About half of the international Ph.d-students are from non- EU/EEA countries.

Germany

Tuition fees for any type of students (home, EU or non-EU) studying on undergraduate or consecutive⁸¹ Master's programmes were permitted from January 2005, and have now been adopted or are planned in around half of the 16 German federal states whilst the others are debating whether or not to introduce fees. Doctoral candidates are generally exempted. Fees are normally set at the same level for each type of student and are relatively low compared with fees in other countries. The general ceiling for tuition fees has been set at €500 per semester (€1,000 year), although they can be higher in some states than in others whilst universities in North Rhine-Westphalia are not obliged to charge tuition fees at all. All students in Germany are also required to pay additional fees for particular services, as described in Example 5. Since the country has relatively low student living costs (around €770 a month) Germany offers good value and

⁷⁸ See MSTI (2009).

⁷⁹ Rogers and Kemp, op cit.

⁸⁰ Ibid.

⁸¹ A consecutive master's programme builds on a previously completed Bachelor's programme in the same field of study (e.g. a Master's programme in Automotive Engineering continuing directly on from a Bachelor's degree in Automotive Engineering).

internationally recognised HE provision (e.g. via league tables) at a much lower cost than in other major destinations.

Example 5: Additional Fees for Students in Germany

In addition to the tuition fees, home and international students are required to pay a small Semester Fee (Semesterbeitrag) each semester. This fee differs across institutions but is generally in the region of €100-€200. It includes a social 'contribution' for facilities maintained by the student service organisations; a financial contribution towards student representations (e.g. student parliament); and a payment for a 'Semesterticket' covering local transport (at some institutions). Some federal states also charge an administration fee which ranges between €50 and €75 a semester. Some HEIs require foreign applicants to pay application fees (usually around €50) and some institutions plan to introduce student support fees to pay for special services offered to foreign students⁸². Students who study in Germany must have health insurance cover and pay contributions for nursing care insurance – this amounts to around €55 a month.

The introduction of tuition fees was designed to allow German HEIs to generate additional income to enable them to invest in improved infrastructure to support teaching and learning (rather than to make a profit), and for international students this will hopefully result in improved services such as language courses, alumni activities, and student accommodation.

There is no scholarship funding available to support non-German students for a whole course of study, although the DAAD provides a scholarship database that includes around 100 funding opportunities for international students offered by over 60 organisations. International students can apply for grants and scholarships to fund part of their studies from numerous organisations – including the DAAD, political foundations, religious organisations, or business and industry organisations. Foreign students resident in Germany prior to studies may be eligible for state training assistance and/or a student loan.

German HEIs also offer scholarships and grants to students at partner institutions who are in their study completion phase or who are doing a doctorate at a graduate school. The DAAD distributes Federal scholarship funding and in 2007 27,808 foreign students and graduates were funded by the DAAD. The DAAD's Strategic Programme for 2008-1011, suggests that it will allocate more and more attractive scholarships for international students.⁸³

Sweden

Currently no students at public sector universities pay tuition fees in Sweden (including students from outside the EU/EEA). However, non-EU/EEA students must prove as part of their eligibility to receive a student visa that they have sufficient funds in their bank account to cover their living costs for the whole of the time they plan to study in Sweden. These are estimated at approximately €700 per month for living, studying and subsistence costs.

Swedish students registered at a university or a university college and fulfilling at least 70% of the annual performance requirement receive a public grant of approximately €2,370 a year and are in addition offered a yearly loan of €4,835 at a favourable interest rate. The loan has to be paid off on completion of studies at a low annual instalment rate. The grant and the loan are also available for Swedish students studying abroad. These students can also get loans to cover the cost of tuition. Grants and loans can be obtained during a period of at most six years. EU-citizens and citizens of Iceland, Norway and Liechtenstein may be supported if they have a permanent residence permit, have a residence permit and have been working in the country for at least two years or if they are married or have been living with a Swedish citizen for at least two years. Those having status as refugees are entitled to the support irrespective of country of origin under the same conditions as Swedish citizens. Foreign students compete with Swedish students for PhD funding (arranged by universities) which are designed to ensure support for the most talented students, regardless of nationality⁸⁴.

In October 2009 the Swedish government sought the Riksdag's (Parliament) approval to charge tuition fees to certain categories of non-EU/EEA students on undergraduate and Master's programmes (not exchange students) from January 2011 (it was originally planned to be introduced in January 2010). The Swedish

⁸² DAAD (2008)

⁸³ See DAAD (2008) for further information.

⁸⁴ Carlsson et al, (2009).

government has observed the introduction (or planned introduction) of tuition fees in its neighbouring Nordic and Baltic countries and is keen not to miss out on the additional income that these countries could potentially generate. As in other countries that have recently introduced tuition fees, the intention is that over the long-term the fees income generated from overseas fees will make the growth in international enrolments more sustainable and will enable Sweden to become more competitive in the lucrative global international student recruitment market – particularly in markets such as Asia and Russia.

As in Denmark there is likely to be no fees 'cap' and each university would be able to decide its own fees but the government intends that the tuition fee should only cover the costs of educating international students (a suggested figure is around €6,700-€7,700)⁸⁵. Students on exchange schemes would be exempted from the fees which would only apply to students applying to the Swedish university directly. The additional fees income is not designed to be used to make a profit for institutions but to enhance competitiveness through improving marketing activities (e.g. by promoting areas of expertise rather than whole institutions) and the quality of education provision and student support mechanisms.

The Swedish government is also planning to introduce a system of grants or stipends to assist international students unable to afford tuition fees and it expects universities to introduce scholarships. The Swedish Institute currently funds around 150 scholarships a year for overseas students studying in Sweden. Many of these scholarship programmes are currently targeted at Eastern European countries, such as the Balkan region, the Baltic Region and states from the former Soviet Union (the Ukraine, Belarus and Russia). The intention is to subsidise large numbers of students in the short term to ensure that numbers do not fall too drastically, and to attract high-quality students from across the world.

There are some concerns in the Swedish higher education sector, as in Denmark, that the introduction of tuition fees for non-EU/EEA students on complete programmes will, at least in the short term, make studying in Sweden less attractive for non-EU/EEA students compared with English-speaking countries where the institutions are more prestigious and employment opportunities are better both during and after studies. It is also likely to deter students from developing countries who will not be able to afford the fees. There is also some concern that introducing fees for non-EU/EEA students may make it easier to introduce fees for all students in the future.

However, if the income is invested in quality improvements then in the longer term the introduction of fees may help to boost recruitment, especially amongst wealthier students who sometimes assume that if education is free (i.e. without tuition fees) it is of lower quality. Offering fee-free higher education is not always the best marketing tool.

The success of some UK post-1992 universities in recruiting international students is viewed as a positive model for Swedish institutions, and even if fees are introduced they will be significantly lower than those in the UK even though living costs may be higher⁸⁶. Nevertheless, a study undertaken in 2007 by Sweden's National Agency for Higher Education (Högskoleverket) and the Swedish Institute found that many may choose not to pursue their studies in Sweden if fees are introduced. According to the study, 86 percent of students would recommend studying in Sweden to others but with tuition fees, only 37 percent would recommend Sweden⁸⁷.

Netherlands

Higher education institutions in the Netherlands charge tuition fees to both EU and non-EU students. Fees for EU/EEA students are determined by the Dutch government and begin at around €1,500 per year (for those under 30 and part-time students) and for non-EU students these are set by institutions and generally range from €5,000 to €9,000 per year at undergraduate level and from €7,500 to €12,750 at postgraduate level (although fields such as medicine and dentistry are often much higher). Some Dutch institutions plan to offer scholarships to all non-EU students during their full period of study on the condition that students make sufficient academic progress⁸⁸. In 2006 nearly a quarter of foreign students in the Netherlands were offered a scholarship from one of the major international granting agencies, through a Dutch programme, or from their home countries. Although only half of foreign students in the Netherlands originated from within Europe, Europeans held 83% of the major scholarships. Other scholarship recipients were from Asia (12%),

⁸⁵ Parafianowicz (2009)

⁸⁶ Sillitoe (2009)

⁸⁷ Landes (2008)

⁸⁸ OBHE (2008c), op cit.

Africa (3%), and other parts of the world (2%). Also in 2006, the Dutch government invested 4.8 million Euros on scholarships for foreign students. All students from Brazil, China, India, Indonesia, Malaysia, Mexico, Russia, South Africa, Taiwan, Thailand and Vietnam are eligible to apply for the Huygens Scholarship Program. DELTA (Dutch Education: Learning at Top Level Abroad) funding is also available to students from Brazil, China, India, Indonesia, Malaysia, Mexico, Russia, South Africa, Taiwan, Thailand or Vietnam. Indonesian students can also apply for the STUNED programme, which is intended to subsidise development-related training⁸⁹.

Tuition fees were introduced in 1986 and appeared to have no detrimental effect on international enrolments, perhaps because they were initially heavily subsidised and because a comprehensive scholarship programme was in place to limit the impact of full-cost fees in which international students were able to access support from both universities and Dutch government. Most of the support is targeted at high-quality and high-achieving international students, and in 2006 the Dutch government announced a scholarship programme which supported both international students wishing to study in the Netherlands and Dutch students wishing to study abroad.

In addition, Dutch students have access to government support for their studies via a basic grant, a supplementary grant, and a student loan. These students receive the basic grant, which is paid at a lower rate if a student is living with his or her parents. These students are also eligible for a supplementary grant based on a parental income test. Both grants are made initially as a loan, which is converted to a grant if students meet necessary performance criteria (in an allotted period). Dutch and EU students are also eligible for a non-means-tested loan which has a low interest rate. Since 2007 Dutch students are now entitled to use the government's educational grants and loans to fund an entire higher education programme in any country.

The cost of living in the Netherlands is also lower than many of its competitor countries (e.g. Denmark, Norway, Switzerland, France and the UK), making it very competitive in the international student recruitment market. However, in January 2009 the Dutch government ceased subsidising non-EU students, meaning that Dutch HEIs now have to cover the full cost of teaching such students. Most Dutch institutions have responded by raising their non-EU tuition fees substantially (in some cases doubling fees levels) which brings their fee levels closer to those in the UK.

The Dutch government has announced that Dutch HEIs will receive €50 million to improve services offered to international students in order to make their institutions more attractive to international students⁹⁰. Funding will be allocated to institutions according to the number of international students enrolled in 2006, so support for additional international students will need to come from tuition fee income.

A recent report for the UK International Unit⁹¹ looked in detail at tuition fees levels and student support at two Dutch higher education institutions: the University of Leiden and the University of Maastricht and details are provided in Example 6. Both universities have tended to raise tuition fees annually and in the past year have increased fees significantly in response to the Dutch government's withdrawal of the subsidy for international students.

Example 6: Tuition fees levels and student support at the University of Leiden and the University of Maastricht

At Maastricht tuition fees for international Bachelor's students are determined three years in advance, and are set at €8,000 for the 2009–10 academic year and at €8,500 for 2010–11 and 2011–12. Both institutions offer a range of scholarships for international students which comprise either full or partial fee waivers. These can be awarded to either high-achieving students or those with a financial need. Leiden offers partial fee waivers to high-achieving undergraduate and Master's students and targeted scholarships to students from China, Colombia, Russia, South Korea and Taiwan and South Africa. Maastricht has three scholarship programmes, a tuition fee waiver scheme targeted at talented students at Master's level (for up to 2 years), scholarships funded by the university's partner companies aimed at talented Master's students in particular faculties, and from 2007-8 the top 3% of students in each faculty are eligible for one-year of fee waivers providing they continue their studies at the university or are at the end of their studies.

⁸⁹ See OBHE (2006b) for more details.

⁹⁰ OBHE and Kingston University (2009), op cit.

⁹¹ Ibid.

United Kingdom

Since 1980, when direct subsidies to universities for students from outside the European Union ceased, UK higher education institutions have had the autonomy to set their own tuition fee rates for non-EU students that cover the full costs of education for these students. Setting their own tuition fee rates enables the HEIs to respond to market changes which reflect demand for new subjects and ways of studying and learning, and to directly compete with other HEIs in the UK and beyond. They are not bound to follow any national policy agenda in international education and many universities have developed strategies to generate income from the sale of teaching, research and consultancy services, both nationally and internationally. A key rationale for the introduction of this policy was to enable higher education institutions to diversify their income base to help generate additional income, important as universities received significant funding cuts in 1981 and 1986. International activities taking place 'overseas' are expected to be self-financing (i.e. recruitment, cross-border education, specialised support), although British institutions are able to use public funds to provide on campus support activities that are not directly targeted at international students, and to support exchange programmes. In 2003-4 UK universities received on average 8% of their total income from international students⁹² and there are 10 institutions where international fee income comprises over 15% of their total income⁹³.

There is no official source of information in the UK about international fee levels, although information has been collected informally from (a selection of) institutions⁹⁴. This compares UK and EU fee levels with those for international students, at undergraduate, postgraduate and foundation levels. This data set also contains information about fees for short-term study (e.g. a year, term or semester) and differentiates between fees arts and science programmes. The fees dataset does not contain any information about other study related costs (e.g. accommodation) or information about grants, loans, bursaries receivable or their sources (e.g. private, the UK institution or national governments). It also isn't able to quantify the proportion of students who pay which level of fees, and doesn't provide an insight into fees levels at the numerous private sector UK HEIs.

In 2008/9 the majority of UK home and EU undergraduates were charged an undergraduate degree fee of €3,500 per year and around €4,200 a year for most postgraduate programmes, although some Master of Business Administration (MBA) courses, charging up to €18,650 a year for home and EU/EEA students. Some students are also eligible for bursaries awarded by institutions, and all UK and EU/EEA students are eligible for income-contingent student loans which enable them to pay their fees (except in Scotland). In Scotland, EU students do not pay any fees for undergraduate programmes, although English students do. Students from outside the EU are generally charged between €8,900 and €14,500 a year, the highest fee levels in Europe and comparable with those in the USA. On average international students studying arts subjects were charged of €10,600 a year, and science students were charged €11,600. At postgraduate level the average fees were around €12,200 and €13,900 respectively. Obviously the average is affected by the fact that some institutions (e.g. the London Business School and Imperial College) are able to charge very high fees around €33,400 a year, whilst some smaller HEIs charge much lower fees (the lowest was Heythrop College which charged all overseas undergraduates €6,100 a year).

Research undertaken in 2007 suggests that student living costs in the UK were around €210 a week although this is likely to be higher today⁹⁵. Using this figure, together with student numbers and average fees levels, the Higher Education Policy Institute (HEPI) estimated that in 2004/2005 students from outside the EU contributed €3.2bn to the UK economy (€1.67bn from fees alone)⁹⁶. Many such students also make a contribution to UK GDP since a substantial number stay on and work after they have graduated, often in highly skilled jobs.

The recent economic downturn doesn't appear to have had an immediate impact on either international student recruitment to the UK or fees levels, perhaps due to cheaper costs created by the falling value of the UK pound and more favourable exchange rates in countries such as India. However, there are concerns that the value for money of UK study may come under closer scrutiny as the credit crunch bites and both the UK government and individual institutions have been keen to promote their financial support mechanisms.

⁹² Sastry (2006)

⁹³ Gill (2008)

⁹⁴ The survey data is updated regularly and is available via the following link:
http://web.mac.com/mikereddin/PublicGoods/Education_files/UKFees20089.xls

⁹⁵ UNITE (2007)

⁹⁶ Vickers and Bekhradnia (2007)

Most scholarships in the UK that are targeted at non-EU/EEA students are for postgraduate students. Most undergraduate scholarships and support comes from UK institutions, the EU, overseas governments or from international agencies. The British Council provides details of the major UK scholarship schemes at postgraduate level. The Commonwealth Scholarships Commission (CSC) manages funding of around €13.3m from the Department for International Development (DfID) for awards and fellowships targeted at students in developing Commonwealth countries. The Foreign and Commonwealth Office also co-funds the Commonwealth Scholarship and Fellowship Plan (CSFP) and provides scholarships to students in developed countries via the Marshall scheme for the United States and the global Chevening programme which provides around 1,000 new scholarships each year for postgraduate studies or research and over 200 Fellowship places to students from 130 countries. In addition, US students can apply for support via the Fulbright programme, and Commonwealth students can also receive support from the Commonwealth Shared Scholarship Scheme co-supported by the Department for Innovation, Universities and Skills (DIUS) and selected institutions, and from Royal Society fellowships targeted at students in the USA, Canada and Asia. DIUS also provides some funding for PhD students via the Overseas Research Students Awards Scheme (ORSAS). In special circumstances undergraduate students can be funded by the CSFP and the Commonwealth Shared Scholarship Scheme.

Immigration and Visa Policies and Employment Regulations

International students from within the EU and the EEA are normally able to move freely between member nations for the purposes of work and study. However, the regulations for non EU/EEA students relating to obtaining visas to study, and employment and immigration regulations relating to employment both during and after study vary from country to country. Since the ability to undertake paid employment is a key factor for non EU/EEA students when choosing a study destination, the comparator countries are currently clarifying their approaches to casual work and skilled migration for such students. A summary of the student and employment issues in each comparator country is provided in Table 5.

Table 5: Student Visa and Employment Issues by Comparator Country

	Study Visas	Employment		Key issues
		During Studies	Skilled Migration	
Denmark	Newly streamlined application process	Fifteen hours a week in addition to their full-time studies	6-months to find work post graduation	Finding work without national language. Improving rate of foreign graduates staying in Denmark for employment
Germany	Centralised application service 'Uni-assist'	90 full or 180 half days per year alongside their studies	Can extend residence permit to look for employment in for up to 1 year with sufficient financial resources.	Restrictions on working hours during study.
Sweden	New internet-based centralized applications portal 'Studera.nu'	No restrictions	Must leave Sweden and apply for a work permit	Finding work without national language. Need to change regulations so highly skilled graduates do not have to leave Sweden after their studies.

Netherlands	Expensive and needs to be renewed annually	Ten hours a week during term-time and full-time in the summer - with a work permit	Can remain for up to one year to find work.	High visa costs, and a need to streamline the visa system. Difficulty of finding work due to restrictive work permit regulations
--------------------	--	--	---	--

Denmark

Denmark has recently adopted a whole of government approach to skilled migration and study visa issues and has recently introduced measures to improve and streamline the application process for overseas students.

Measures used to attract talented international workers include special salary arrangements, inexpensive schooling for accompanying children, job opportunities for accompanying partners and special (lower) tax arrangements. Foreign researchers are eligible for income tax at a maximum of 25% (approximately half of the normal taxation level in Denmark) for three years or 30% for five years. However, there is evidence that foreign researchers do not stay in the country for long unless they have family in Denmark⁹⁷.

In terms of employment regulations, during their studies non-EU/EEA students can work for fifteen hours a week in addition to their full-time studies. Following graduation non-EU/EEA students have six months to find work in Denmark, and if they find a job, they have to apply for a work and residence permit. This can be obtained provided they fulfil certain requirements. Now former Minister for Science, Technology and Development Helge Sander has recently called for Danish businesses to consider employing foreign students as interns and has suggested that talented international students (from China and the USA) could receive labour market scholarship to support their study in return for committing to work in Denmark⁹⁸. Around 1/3 of international students stay on to work in Denmark, although finding a job in Denmark is more difficult for arts and humanities students and those with poor Danish language skills.

Highly qualified graduates who have studied either in Denmark or elsewhere, can also obtain a 'Green Card' in Denmark enabling them to live and work in Denmark for three years. To be issued a residence permit under the Green Card Scheme, foreigners have to have obtained at least 100 points. The points are awarded based on five criteria: education, linguistic ability, work experience, ability to adjust and age⁹⁹.

Germany

The process for applying for a place in a German HEI has been streamlined in recent years and over 90 German HEIs now only process international study applications once these have been formally pre-checked by the certification service 'Uni-assist'. This service means that international students only need to apply to one central office.

Students from within the EU/EEA and Switzerland do not require a work permit to undertake paid employment, while other international students with a residence permit to study in Germany are permitted to undertake paid work for a maximum of 90 full or 180 half days per year, alongside their studies, and to work as student assistants in higher education, without prior approval from the Foreigners' Authority. This work permit is included in the legal provisions of the residence permit. Any work exceeding these limits must be approved by the Foreigners' Authority, who will decide whether the employment can be regarded as 'student employment' (although in many cases, the post needs to be approved by the Federal Employment Agency).

In 2007 an amendment to Germany's Residence Act further clarified the regulations related to non-EU/EEA students' paid work during study through restricting significant temporary or casual work on pre-university

⁹⁷ Carlsson et al., op cit.

⁹⁸ See Copenhagen Post (2009).

⁹⁹ More information is available via the following

URL:<http://www.workindenmark.dk/Find+information/Til+arbejdstagere/Regler+for+ophold+og+arbejde/Saerlige+ordninger/Greencard+ordningen.aspx>

preparation courses to the first year, and increasing the options for revoking residence permits for study purposes if students take up unauthorised paid employment. The 2007 amendment is also relevant to non-EU/EEA students wishing to work after graduation, who are now able to work to the same extent as non-EU/EEA students enrolled in a German HEI, and non-EU/EEA students can extend their residence permit to look for employment in Germany for up to one year provided they can prove to have sufficient financial resources.

Sweden

Students from outside the EU/EEA are able to work full-time in Sweden throughout the whole of their period of study if they have a student visa. Sweden has introduced a new internet-based centralised applications portal 'Studera.nu' to deal with overseas applications.

Sweden is the only comparator country that does not place any restrictions on the number of hours which international students can work. However, the families of international students are not able to work and also have to prove that they had enough funds to support themselves financially for the entire duration of the study period.

Following graduation the regulations become significantly more restrictive for students wishing to stay in Sweden to work. Their student visa requires them to leave Sweden immediately on completion of their studies, and to re-apply for a work permit from their home country if they would like to return for employment. Even when student visas are extended for the purposes of study, they are not normally convertible into permanent residency. There are some plans to change the law to allow international students to stay to work for a period after their studies, but it is unclear when this would take effect.

In addition, unemployment in Sweden is currently high, and there are only limited opportunities for non-Swedish speakers to find employment. It is unclear whether there are any plans to encourage development of employment options for international students which do not require fluent Swedish.

Netherlands

In the Netherlands a visa for non-EU/EEA students costs €250 for a temporary residence visa plus €188 (£164) a year for a student residence visa, which means that the Netherlands has amongst the highest visa costs in Europe, only cheaper than the UK and in many countries visas are free. Students must apply for both separately, which makes the process extremely cost and time-intensive and present a significant barrier to entry. In addition, should a non-EU/EEA student wish to transfer to another university or course programme this costs an additional €433. It is expected that this system will be streamlined from 2011 onwards, particularly for non-EU/EEA students in study areas and professions where the Netherlands has a shortage of employees.¹⁰⁰ Students would not have to renew their visa on an annual basis during their period of study in the Netherlands, and they would be able to switch from one Dutch HEI to another without having to change their visa.

Since 2004, Chinese students wishing to study in the Netherlands have been required to apply for a NESO certificate, which guarantees a student's English-language proficiency and the validity of previously obtained degrees. Students need to submit this certificate to the student administration office of the HEI they like to register with. In addition, all Dutch HEIs are required to submit a 'NESO Certificate' to the Dutch visa authority in order to apply for the entrance visa of Chinese students. Since June 2008 the Dutch government has also developed a stricter entry control system for students from Pakistan, since many Pakistani students with a student visa have dropped out of their courses while remaining in the country to seek employment.

Employment opportunities for non-EU/EEA students in the Netherlands are relatively restricted and it is difficult for non-EU/EEA students to find a part-time job alongside their studies. Non-EU/EEA students in the Netherlands are allowed to work ten hours a week during term-time and full-time in the summer months - if they have a work permit (which must be applied for by their employer). Students who have a part-time paid job are also required to take out a health insurance, and the costs involved can be as high as any income they receive from working. In 2008 the time that non-EU/EEA students are allowed to remain in the Netherlands after graduation to look for a job was extended from three months to a year, although they are not entitled to receive a Dutch government maintenance payment during this period. In addition, minimum

¹⁰⁰ See Nuffic (2008c)

starting salary that foreign graduates need to earn to qualify as highly skilled migrants has been reduced from €34,130 to €25,000 per year¹⁰¹.

International Partnerships and Transnational Education

There are also a significant number of government to government, or multi-lateral and inter-institutional partnership agreements related to student mobility that are designed to foster collaboration and achieve mutual benefit – for example through promoting student exchange or joint degree programmes. In addition, many European countries are also pursuing strategic national-level alliances with key countries outside Europe, such as the USA, China and India which they hope will foster student, researcher and staff mobility and other types of collaboration in areas such as research and collaborative teaching provision. Many of these are expected to act as regional hubs, which can help to support student recruitment and other types of international engagement (e.g. with the business sector) in key countries and regions. These types of links point to an emerging situation in which there is a balance between competition and collaboration between countries and between institutions related to international student mobility and international competitiveness more widely.

International partnerships between European HEIs and HEIs in other countries have been important for many years in supporting short-term mobility and exchanges involving academic staff and students. However, in recent years there has been a trend toward partnerships which, in addition to short-term mobility also foster transnational education activities such as collaborative teaching provision (e.g. joint degree programmes, twinning programmes, and supported distance learning programmes). In addition, many new institutional partnerships are encouraged and financially supported by national governments via strategic government to government agreements. A key form of transnational collaboration within Europe is the development of EU schemes such as Erasmus Mundus and the EU-Atlantis programmes (with the USA) which focus on joint degree programmes and short-term student mobility. However, in countries where EU students do not normally pay fees there are difficulties for students seeking to participate in such programmes, which are generally intended to attract non-EU/EEA students.

The main national-level partnerships and extent and support for transnational education in each comparator country is summarised in Table 6.

Table 6: National-level partnership agreements and transnational education by comparator country

	Main National-Level Partnerships	Transnational Education (TNE)	
		Extent	Government Approach
Denmark	China, Japan, USA, Nordic Countries	Very limited, plans for distance learning	Collaborative provision not currently permitted, but planned
Germany	India, China, Commonwealth of Independent States (CIS)	Significant	Collaborative provision permitted, encouraged and financially supported
Sweden	Bulgaria, China, France, Germany, Hungary, Italy, Japan, Romania, Russia and Ukraine	Very limited, but distance learning via the Swedish Net University (SNU)	Collaborative provision permitted, but with limited financial support
Netherlands	Brazil, India, China, the Middle East	Limited, but growing	Collaborative provision recently permitted for all HEIs and is encouraged for financial and academic reasons

¹⁰¹ See Europe Unit (2008).

Denmark

Several Danish HEIs have also entered into bi-lateral partnerships and networks with overseas institutions which facilitate student mobility (e.g. exchange programmes). The Danish government provides strategic encouragement but limited practical or financial support for the development of overseas partnerships. The 2004 internationalisation strategy encouraged institutions to consider export of online provision but Danish HEIs cannot currently offer Danish degrees abroad, although this is likely to change by 2011.

A small number of Danish HEIs are engaged in transnational activities (e.g. Niels Brock in China) and partner with overseas institutions to offer collaborative teaching programmes (e.g. Erasmus Mundus). A number of Danish institutions are engaged in Erasmus Mundus programmes, however, there have initially been some issues concerning the payment of tuition fees by Danish students (according to the law, Danish students in Danish higher education institutions cannot be charged tuition fees). Erasmus Mundus programmes with Danish involvement are now described 'international programmes' for which tuition fees can be charged. Danish students enrolling in these programmes receive a grant for 'studying abroad' which covers their tuition fees.

There is more interest in transnational education amongst institutions offering short -cycle programmes rather than full-degree programmes, since these are likely to be more popular with many students due to their shorter duration and overall costs, and thus could generate significant income. However, in general, most Danish HEIs are interested in the academic benefits of transnational collaboration rather than any financial benefit, for example the University of Copenhagen's engagement with the International Alliance of Research Universities (IARU), a consortium of ten research universities from across the world.

The Danish government has recently developed strong links with China and in 2008 it announced plans for a research-based Danish University Centre in Beijing in partnership with the Graduate University of Chinese Academy of Science (GUCAS). This Centre is designed to foster Sino-Danish links at many levels, including higher education (mainly researcher and student mobility) and all Danish universities are contributing the initiative. The proposed institution is expected to offer PhD programmes and joint degree Master's programmes awarded both by a Danish University and GUCAS. The centre will be developed over a five year period (2009-2013). By 2013 the centre aims to have a staff of 100 researchers, 75 PhD students and 300 Master's students, half from Denmark and half from China. The Danish contribution to the centre will primarily involve staff (visiting professors and postdoctoral candidates) contracted to work there for one to three years. This is part of the Government's larger China Strategy, a national agenda to strengthen research, innovation and university collaboration between the two countries. The government aiming to extend scholarship schemes beyond Europe to include talented Chinese university students, including PhD candidates, but it is also looking to establish a series of internship placements for prospective students in Denmark, and eventually in China, in association with the commercial sector. The Government is also considering establishing a series of PhD scholarships for Danish researchers and overseas student alumni networks targeting Chinese students and Danish knowledge workers in China. Denmark also developed network partnerships in Japan and the USA which may also help Denmark attract skilled migrants^{102,103}

The Danish HE sector also has strong links with other Nordic countries, particularly related to facilitating mobility (e.g. NordPlus an exchange programme between the Nordic countries and the Baltic States related to student and teaching staff exchange) and a Nordic Master's degree has recently been developed.

Germany

Since 2001, the German government has developed a range of initiatives designed to develop German transnational provision overseas. The rationale for this approach is to attract increasing numbers of international students, boost the internationalisation of German HEIs, and to increase inward and outward student exchange.

The German Federal Government (through the DAAD) has provided start-up funding to encourage German HEIs to develop integrated international joint and dual degree programmes with HEIs abroad in particular target countries (focusing on Poland, Spain, Italy, China and Russia). In 2007/8 German institutions were

¹⁰² OBHE (2008a), op cit.

¹⁰³ Carlsson et al, op cit.

involved in 97 government-supported joint/dual degree programmes with HEIs in 35 countries, including 64 Master's, 25 Bachelor's and 8 Diploma programmes. In addition, the German Federal Ministry of Economics and Technology has funded selected German HEIs for three years to develop dual or joint degree programmes with HEIs in the US and Canada. In 2007 the DAAD also funded 31 transnational programmes overseas which include the provision of a German or joint Master's programme abroad or the establishment of an overseas German institute for education and research. These programmes include partnerships with HEIs in Asia, Eastern Europe, Latin America and the Middle East, although most partnerships are in China.

A Federal Government funding programme also encourages German HEIs to establish branch faculties ideally if there is an identified need from the host country. Such initiatives are intended to develop capacity in the host countries, although they can also act a source of postgraduate students to Germany. Currently, there are two branch faculties at foreign universities (in China and Thailand) that are – at least partly – owned and operated by their German parent institutions¹⁰⁴.

Other German HEIs have set up independent HE providers abroad most notably the German Institute of Science and Technology (GIST) in Singapore, founded by the Technical University of Munich in 2001 which is described in more detail in Example 7.

Example 7: Partnership activities involving the Technical University of Munich

The Technical University of Munich (TUM) is involved in a range of partnership activities overseas. The German Institute of Science and Technology (GIST) in Singapore was founded by TUM in 2001 with initial funding from the DAAD and the Singaporean Government. At GIST, TUM offers five dual MSc degree programmes (in aerospace engineering, industrial chemistry, integrated circuit design, intelligent transportation systems, and microelectronics) in partnership with the National University of Singapore and Nanyang Technological University. TUM also offers three Erasmus-Mundus Master's programmes and (in addition to the dual degree programmes offered in China and Singapore) at least eight dual Master's degree programmes with French Grandes Écoles and universities in Denmark, Finland, France, Greece, Italy, Russia, Spain, Sweden and the USA. Overall, the number of TUM's formal international co-operations has risen from 33 partner universities in 1996 to 142 in 2008. These partners are from all over the world, but mainly in Asia (including the Middle East, 48), Asia (37), North America (17), Latin America (14) and Russia (14). TUM also belongs to a number of international networks.

There are also seven foreign universities that, although funded and initiated by receiving countries, are 'academically backed' by one or more German HEIs, which are responsible for curriculum development and quality assessment at the foreign universities. These German-backed universities are operational in Egypt, Jordan, Kazakhstan, Lebanon, Oman, Syria and Vietnam, while two further German-backed universities are expected to be opened in Turkey (by late 2009) and Pakistan. Modelled on the German universities of applied science, the curricula offered by German-backed universities are developed in close collaboration with business and industry, and are geared towards the requirements of the labour market. As such, the German-backed universities represent a new higher education model in the foreign country and play a role in the wider reform of higher education in the developing country. For the German institutions, involvement in a foreign-backed university is a much cheaper way of offering programmes in other countries than the establishment of a fully German branch campus abroad. For the German institutions, the academic backing of a foreign university is a potential means to attract international students to higher education institutions in Germany: many students at a foreign-backed institution spend one of their academic years in Germany and it is expected that a number of its graduates will continue to study for a Master's degree in Germany¹⁰⁵

Beyond these transnational initiatives the German Federal Government has also developed national-level strategic alliances with a range of countries (e.g. India, China, and Russia). Russia and the Ukraine are both priority countries in Germany's co-operation with the members of the Commonwealth of Independent States (CIS), the successors to the Soviet Union. Germany co-operates with both countries in almost all areas of research and technology, and supports them in their efforts to reform their research infrastructure and adapt their systems to the market economy

Sweden

¹⁰⁴ Namely, the Sirindhorn International Thai-German Graduate School of Engineering of Germany's Technical University of Aachen in Thailand, and the Chinese-German Technical Faculty of Germany's University of Paderborn at the Qingdao University of Science and Technology in China.

¹⁰⁵ OBHE (2008b), op cit.

International networks and partnerships are extremely important to the Swedish higher education sector and in individual institutions particularly as they support staff and student mobility, and other types of academic collaboration as part of the broader internationalisation agenda. The 2005 Högskoleverket internationalisation study reported that "international networks are expanding"¹⁰⁶ across the Swedish higher education sector, particularly across the Nordic countries, Asia and Europe (particularly in Russia).

At the national level the Swedish government has supported a range of bi-lateral national level exchange programmes with Bulgaria, China, France, Germany, Hungary, Italy, Japan, Romania, Russia and Ukraine, and operates a wide range of programmes aimed at facilitating student/faculty exchanges. These programmes include the Swedish Institute's Visby Programme, which aims to "create functioning and long term networks in educational areas with other Baltic countries and certain adjacent areas", the Nordplus Programme (a staff and student exchange programme between the Nordic countries) and the Linnaeus Palme programme, which promotes inward and outward mobility and exchange between staff and students from Sweden and developing countries.

The Swedish International Development Cooperation Agency has funded a substantial number of distance learning programmes in developing countries as well as the Swedish Net University (SNU), launched in 2002 as a €14-million project centralising the online offerings of Swedish universities in an online portal¹⁰⁷.

In addition, the Swedish Foundation for International Cooperation in Research and Higher Education supports research and exchange programmes in South Korea and other Pacific Asian countries, and funds scholarships for students wishing to study in China in a long running national programme. In addition, the Higher Education Commission in Pakistan funds Swedish students carrying out research in Pakistan.

At an institutional level, Sweden's HEIs are trying to develop strategic partnerships with 'world-class' institutions in other countries focused mainly on student, researcher and faculty exchange (e.g. Erasmus Mundus exchange programme agreements are growing in number, and research with other European countries continues to grow).

In 2007 the Royal Institute of Technology (KTH) announced plans to establish a technical university in Sialkot, Pakistan, which will cater for 5,000-7,000 students. Whilst the curriculum has yet to be finalised, the new institution will have a strong research component and is intended to offer several five-year courses in engineering and a number of Master's programmes. The university, which was expected to be operational by 2009, will be fully funded by the Pakistani Government, with the Swedish institution receiving funds to cover all associated costs. KTH will be in charge of running the university for a transition period of 10-12 years, a period during which it will issue KTH degrees and be responsible for the recruitment of local and Swedish staff, and for the provision of education and research. KTH is expecting the venture to allow it to advance its position on the international scene, widen its research base, and improve its ranking¹⁰⁸.

Lund University is also involved in a range of international networks both within Europe and internationally. It is founding member of both Universitas 21 and the League of European Research Universities (LERU) which collaborate on student exchange and research, and is also a member of the Utrecht network (European institutions focusing on student exchange and internationalisation). Lund is also a member of Öresund University, a network of 12 universities in Southern Sweden, and the institution collaborates closely with other universities in southern Sweden. In addition, in its latest Strategic Plan, Lund sets out as one of its strategic priorities for the future, that 'forms of cooperation will be established in the Middle East, East- and Southeast Asia as well as South Asia'. It is also involved in the Nordic Centre at Fudan University. The Centre was established in 1995 in co-operation between 23 Nordic universities and China's Fudan University in Shanghai. The centre is the only Nordic Academic Consortia in China, and focuses on initiating and developing research and educational activities, student exchange between China and the Nordic countries, and organising programs and seminars for Nordic companies in the Shanghai area. Lund is also a founding partner of the new European University Centre at China's Peking University. This is a joint venture by eleven institutions from across Europe and Peking University. Lund also works intensively with a series of new EU programmes under the Erasmus Mundus External Cooperation Window (EMECW) banner. These programmes have a focus on developing student and staff exchanges and collaborations more broadly with

¹⁰⁶ Högskoleverket (2005), op cit. p.27.

¹⁰⁷ OBHE (2005a).

¹⁰⁸ OBHE (2007).

universities based in target areas outside the EU. The EMECW priorities for 2007–08 are South Mediterranean and East European countries (particularly Jordan, Syria and Lebanon), central Asian republics (Kazakhstan, Tadjikistan, Uzbekistan) and Yemen, Iraq and Iran.

Netherlands

The Dutch HE sector is beginning to increase its level of overseas collaboration through signing long-term cooperation agreements in parts of the world where there is strong economic growth and potentially large student markets (e.g. in Brazil, China and the Middle East). This engagement is designed to facilitate mutually beneficial student and faculty mobility, to support collaborative teaching and to develop research cooperation that can enhance economic competitiveness.

At the sector level Nuffic in 2007 signed a partnership agreement with the Dubai Knowledge Village in the UAE to promote academic exchanges, whilst in 2008 the Association of Dutch Universities signed a co-operation agreement with the Association of Indian Universities to collaborate in the areas of teaching and research¹⁰⁹.

At the institutional level, in 2008 the government introduced legislation that also allows universities of applied sciences to develop dual and joint degree programmes with foreign HEIs. So far, none of the Dutch research universities has established a full branch campus overseas, although a small number of universities of applied sciences have established a small campus or centre abroad.¹¹⁰ In 2009, Wittenborg University a university of applied sciences, announced plans to open two learning centres in India, likely to be located in Jaipur and Amritsar which are described in more detail in Example 8.

Example 8: Wittenborg University's transnational activities in Asia

In March 2009, Wittenborg University announced plans to open two learning centres in India. Both centres will offer a three-year Bachelor's programme in business management, in which students will undertake the first two years of study at one of the learning centres in India, and complete the final year of their programme at the Dutch campus. With approximately 100 study places available at each of the Indian centres, the annual tuition fee will be around €1,870, compared to €5,620 for the same programme in the Netherlands, and university scholarships will be available to high-quality students at the Indian centres. Wittenborg is already operating similar learning centres in the UK, Nepal and Russia, and is planning to open more centres in China, India, the Philippines and the Ukraine under the branch name of 'Wittenborg Asia'¹¹¹.

Several Dutch research universities have also developed joint degree programmes with overseas partners. The University of Groningen has an exchange agreement with China's Peking University and Fudan University, where PhD students complete the first part of their PhD studies in China and the last two years in the Netherlands funded by a RuG scholarship, and where they are offered a university staff post in China on completion of their PhD. The Technical University of Eindhoven has developed a partnership with Manipal University in India related to a dual MSc degree programme in Computer Science and Engineering, with involvement from technology companies in the Netherlands who support Indian students via a scholarship and work placements¹¹².

The University of Leiden offers two Erasmus-Mundus Master's programmes with partner institutions in France and Italy, which, between the two programmes, enrol 40 international students a year. The University of Leiden is also part of the Coimbra Group, the League of European Research Universities and the Europaeum, and is a member of a number of other international consortia of universities. The university has more than 70 co-operation and exchange agreements with partner universities all over the world, and over 150 Erasmus exchange links with foreign universities.

In 2001 the University of Maastricht partnered with the University of Hasselt in Belgium to form the transnational University Limburg (tUL). tUL offers programmes in ICT, bio-medical sciences and life sciences, and encourages international student mobility on a regional basis. There are plans to establish a University of Maastricht campus in Brussels aimed at ongoing education for alumni and other professionals working in the city. The University of Maastricht is also working on establishing an academic hospital in Saudi Arabia,

¹⁰⁹ OBHE (2008c), op cit.

¹¹⁰ One such example is the Stenden Hogeschool, which since 2000 is operating a small campus in Qatar that offers degree programmes in hotel management.

¹¹¹ See OBHE (2009a) for more details.

¹¹² OBHE (2008c), op cit.

and has collaborated with other Dutch universities that are planning to open a branch in Turkey. The University of Maastricht offers a range of dual/joint degree programmes with partner institutions in France, the UK, Germany, Poland, Belgium, Canada and Spain. It has also developed the Groupe Maastricht, a consortium of seven European universities aimed at promoting staff and student exchanges, developing joint degree programmes, conducting joint research projects and teaching programmes, and co-operating in international benchmarking and ranking.

Quality Assurance and Services and Support for International Students

An emerging issue related to international student mobility relates to the quality of the study experience for mobile students. In mainland Europe international full-degree students are a relatively new phenomenon, and student services and administration are not necessarily set up to cope with the demands from such students. In many cases student support and guidance services are designed for exchange students and are located at faculty level, and there is often no 'joined-up' approach at institutional level.

Word of mouth reputation is an important factor in student decision making, and improved quality in student support is one means of attracting international students and enhancing a national reputation for quality higher education. In addition, improved services for international students can improve services for domestic students. Both the Netherlands and Australia are viewed as innovators in this field and focus on consumer protection by setting standards for information provision, guidance and support.

There is an increasing amount of research into international student satisfaction in many European countries, with many institutions becoming involved in the i-graduate International Student Barometer benchmarking approach. Therefore, national governments have begun to introduce measures to help improve the support and overall experience of internationally mobile students in their countries, and the key quality assurance measures relating to international students by comparator country are summarised in Table 7. However, there has so far been limited attention on students studying on transnational programmes.

Table 7: Key Quality Assurance Measures Relating to the International Student Experience by Comparator Country

	Key national-level QA measures
Denmark	Engagement with i-graduate International Student Barometer benchmarking research. Plans for a Code of Conduct
Germany	Introduction of specific fees for student support activities. Government funded PROFIS scheme to help German institutions improve international student support
Sweden	Very limited, responsibility at institutional level
Netherlands	Code of Conduct for all institutions recruiting international students. Engagement with i-graduate International Student Barometer.

Denmark

In Denmark, higher education institutions are responsible for entry standards and supporting their international students. However, the recent Globalisation Strategy contains plans to require Danish institutions to benchmark themselves against international institutions, to develop an institutional accreditation scheme, and to establish minimum English-language skills for international students.

The Danish HE sector (via The Danish Agency for International Education) has also recently engaged with the i-graduate International Student Barometer benchmarking research which found that although most international students (from 3,500 respondents) had a satisfactory experience studying in Denmark and 78% would recommend it as a good place to study around half had problems integrating with Danish students¹¹³. The ISB survey highlighted to Danish institutions that their major competitors include the UK, the USA and

¹¹³ Copenhagen Post (2009a), op cit.

other European countries and so they are keen to improve their competitiveness in the quality of the student experience that they provide.

In addition, the introduction of tuition fees for non-EU/EEA students is designed to enable Danish institutions to improve their services to students. In many cases non-EU/EEA students require English-language support, but since these often don't provide credit, they are difficult to provide. A code of conduct is in progress, but there is currently no code of conduct related to the recruitment and support of international students in Denmark.

As in many countries, there are some diploma mills in Denmark who 'sell degrees' (e.g. Knightsbridge University) but since they are not selling Danish qualifications they are allowed to continue operating.

Germany

In Germany, the DAAD provides funds to enable German HEIs to enhance their international student support activities, and some German HEIs are planning to introduce student support fees to fund tailored services for international students. In 2005 the German Academic Exchange Service (DAAD) launched PROFIS, an initiative aimed at improving the conditions of international students enrolled at German higher education institutions through encouraging universities to develop or intensify their internationalisation strategies in order to better accommodate the growing number of foreign students in the country. The initiative is also aimed at instituting quality control over partnerships between local and foreign institutions¹¹⁴.

As in Denmark, international students have problems integrating with German students, and many students leave before completing their degrees. There is little tradition of living on-campus and many German students either live at home or in group apartments. Most foreign students, meanwhile, live in on-campus housing populated almost exclusively by foreign students. German academic culture, which gives students a great deal of independence and relatively minimal supervision, also poses a challenge for foreign students who are used to structured curricula. In addition, German funding formulas are based on enrolment of foreign students, but there is little incentive to provide support for overseas students once they are in Germany¹¹⁵.

German HEIs support international students in different ways. For example at the Technical University Munich international students receive support from the Student Service Centre throughout the student lifecycle (from application to alumni). This support includes help with administration and finding accommodation, pre-study courses in German language skills and study skills, orientation programmes, and other courses during the academic years. TUM has appointed an international student adviser in each faculty; the faculties are responsible for their own internationalisation activities, and it is their responsibility to mentor their international students. TUM has also formed strategic partnerships with local and international businesses who have provided financial support for international support activities and traineeships for international students at the university.

At FH Münster the International Office provides a range of services to all international students including cultural activities and individual support. Through participation in the DAAD-organised PROFIS project, FH Münster is improving the quality of study for international students and helps these students to complete their studies on time. For instance, prospective international students are to receive comprehensive information about course requirements and prerequisites at an early stage, preferably before enrolling at FH Münster and data is collected on international students' university achievement, differentiated by regional provenance and study programme.

Sweden

In 2008 Högskoleverket published the results of a quality audit reviewing the progression of internationalisation in HEIs in Sweden since a previous study in 2004. It is the responsibility of institutions themselves to conduct their own investigations and analyses as a basis for quality management, and develop and adapt their quality assurance mechanisms to the demands of internationalisation. There are a number of large, well-developed and well-respected HEIs in Sweden that take the quality of their service to international students and internationalisation very seriously. Four HEIs were considered to have

¹¹⁴ See OBHE (2005b) for more details.

¹¹⁵ See AFP (2008)

made particular progress: University of Gothenburg, Karolinska Institutet, the Royal Institute of Technology and Linköping University (LiU)¹¹⁶.

At LiU exchange students' experiences of studying at LiU are evaluated and measured each year through the SARS programme, via online survey. There is also a detailed support procedure for international students including the advice given, in English, on the website, the opportunity to apply for a Swedish 'peer' student, the opportunity to live with or visit host families, an induction for international students, and a visit from the international office during their stay. At Lund, the International Office's Lund University Foreign Friends section supports PhD students, post-doctorate students, visiting scholars and families who are invited by departments.

As in Denmark, there are diploma mills in Sweden and in 2009 for the first time Högskoleverket investigated two institutions (Scandinavian University of Science and Technology and Alhuraa University) and found that they provided false information about their accreditation which could mislead students and employers. Högskoleverket has encouraged the Swedish government to investigate if these two institutions are breaking any Swedish legislation¹¹⁷.

In 2008 Högskoleverket received 3,300 complaints from foreign students who had been rejected for admission by Swedish HEIs, 20% of which were about Stockholm University and the Royal Institute of Technology (KTH). Both receive a high number of applications from foreign students seeking entry to the schools' various Master's programmes, including computer science, engineering, and the natural sciences¹¹⁸.

Netherlands

In May 2006 Dutch government and a co-operative of four Dutch HE associations implemented a Code of Conduct ("Code of behaviour regarding international students in higher education"), which guides institutions in the recruitment and support of international students and seeks to provide prospective international students with assurance that Dutch HEIs offer high quality teaching and recruitment and support procedures. More details about the Code are provided in Example 9. The Dutch government also provides financial support to HEIs to improve both the quality of selected internationally-oriented HE programmes and to improve services offered to international students in order to make their institutions more attractive to international students. Dutch HEIs will receive €50 million to improve their student services and institutions can apply to receive part of €5 million in funding to improve Bachelor's and Master's programmes.

Example 9: Netherlands 'Code of Behaviour Regarding International Students in Higher education' Institutions signing the Code agree to provide instruction and student advice in English, and to ensure that students have adequate information about programmes, fees, housing, and other issues that in the past have led to complaints from international students. According to the code Dutch HEIs must outline the preparatory education requirements (e.g. prior qualifications and language skills) prior to the recruitment of international students for the study programme and evaluate prior to admission whether the international student meets the requirements. In addition, immigration procedures for students accepted at signatory institutions will be simplified. The code was developed in response to the International Association of Universities' (IAU) 2005 policy statement, "Sharing Quality Education Across Borders". The statement encouraged national governments to engage in activities to ensure the quality of international education provided in their countries. The Code provides guidelines on areas such as recruitment and admissions, information provision and the level of support that should be provided to international students. An independent committee of stakeholder organisations monitors the implementation of the Code of Conduct. Only students who are going to study at HEIs that sign the Code of Conduct can obtain a residence permit to non-EU residents for study at the level of higher education, and can take advantage of the services offered by the international offices of the Nuffic. All Dutch research universities and most universities of applied sciences have signed the Code¹¹⁹.

¹¹⁶ See Högskoleverket (2008c) for more details about this audit.

¹¹⁷ See Jonasson (2009) for more details.

¹¹⁸ Landes (2008)

¹¹⁹ See OBHE (2006b) for more details.

Individual Dutch universities also have their own student support mechanisms designed for international students. The University of Leiden provides a counselling service to international students focused on academic, personal, legal and financial issues and provides Dutch language and English language Summer courses for students at different levels. It also assists international students in finding work placements (if they are part of the curriculum) and the employment office offers assistance to international students to find employment after graduation. The University of Maastricht has an objective to improve the quality of its guidance and support for international students. It provides a range of face-to-face support and information to international students including an accelerated procedure for visa applications, careers support for employment and work placements, online materials in different languages regarding funding and course information, and a buddy system¹²⁰ for Chinese and Thai students, where senior students from these countries provide support for new students.

Dutch universities also participate in the International Student Barometer (ISB), which asks international students to grade their satisfaction levels in three main areas: learning (academics-related), living (accommodation, social life, etc), and support (university support services). The ISB allows institutions around the world (mainly from Europe) to benchmark themselves in these areas. In Summer 2008, there were 56 European HEIs participating mainly from Scandinavia. The Dutch universities included TU Delft and the universities of Amsterdam, Wageningen, Maastricht, Leiden, Groningen and Erasmus Rotterdam¹²⁰.

Curriculum Reform and Foreign-Language Provision

The final policy response to the changing patterns of international student mobility relates to the changing teaching and learning approach and content of higher education programmes. Even before the start of the Bologna Process, higher education institutions within Europe had begun to re-orientate the content and delivery of higher education programmes with the aim of attracting international students and to prepare home students to effectively participate in the global knowledge economy. The Bologna Process and the Lisbon Agenda are both designed to stimulate structural reform in European HEIs in order to facilitate greater student mobility. The countries covered in this study are generally highly compliant with these initiatives. The main aspects of these reforms have focused on developing internationally-orientated curricula and offering courses in the English language (and in some cases other major foreign languages). A summary of the nature and extent of curriculum reform in the comparator countries is provided in Table 8.

Table 8: Bologna Compliance, English-language provision and Other Curriculum Reform Initiatives by Comparator Country

	Bologna Compliance	English-Language Provision	Other Initiatives
Denmark	Very high	High - many short courses and programmes at Master's level	
Germany	Moderate, but improving	Moderate - but growing at Master's level	Provision in other foreign languages. English taught summer programmes.
Sweden	High, due to recent reforms	High - many short courses and programmes at Master's level	Joint programmes resulting in double degrees have strongly encouraged by the government
Netherlands	Very high	Very high at both undergraduate and postgraduate level	18-month Master's programmes. English taught summer programmes.

¹²⁰ Eurogates (2008)

Denmark

Denmark is highly Bologna-compliant. Its degree structure as aligned with the Bologna model since the early 1990s, and it has recently introduced professionally orientated bachelor degrees, diploma programmes and professionally-orientated master programmes to link higher education with professional practice and to help Denmark comply with the European lifelong learning agenda. Since 2001 Denmark has adopted the ECTS system, and since 2002 all Danish HEIs have provided a diploma supplement.

Since the 2004 internationalisation strategy Danish institutions have been encouraged to increase the number of courses and entire programmes taught in English to both attract international students as well as provide Danish students with foreign language skills. Denmark currently offers provision in English within most subject areas and at all levels. Danish institutions have been able to offer specially designed English-language programmes targeting international students (mainly professionals) since the 1980s, although there has been significant growth in such provision in recent years, mostly at Master's level. These programmes are not eligible for any financial support from the Danish governments and students must cover the full costs through tuition fees, which can be up to €21,600 for an MBA. Provision is usually limited to 1 or 2 such programmes per institution¹²¹.

At traditional undergraduate and postgraduate level in 2009 there were more than 200 full degree programmes in English and over 1,500 single-subject courses. The majority of English-taught programmes were in the fields of engineering, business and IT. There were also nine professional Bachelor's, and 48 short-cycle programmes taught in English, as well as over 400 short-courses at these levels. In 2008 almost half of the teaching was in English at the Copenhagen Business School, at the Danish University of Technology English was the sole language of instruction in all postgraduate programmes. There are concerns that some lecturers are not able to teach in English to the required standard and that the Danish language should be preserved for both undergraduate teaching and research¹²².

Germany

Over 60% of all German university programmes are currently being offered as Bachelor's and Master's programmes and all German universities are on schedule to have implemented the Bachelor's/Master's structure by 2010 (currently around 75% of German universities have adopted the structure). At the universities of applied sciences, nearly 90% of all programmes are offered as Bachelor's/Master's programmes. The German HE sector has focused on developing an approach which allows for flexible lengths of Bachelor's and Master's programmes which provides a range of study approaches for international students. Many Bachelor's/Master's programmes do not provide much opportunity for study abroad so there have been calls for programmes to be restructured to allow 'mobility windows' and the DAAD supports institutions with its new PRIMUS programme. PRIMUS is funded by the Federal Ministry for Education and Research, it promotes the setting up bachelor programmes of four instead of three years. The majority of German HEIs are also using the ECTS and use it both for credit accumulation and transfer¹²³.

DAAD figures suggest that German HEIs offer 415 programmes at least partly in other languages (mainly in English, but a number of programmes are offered in combinations of German and English, German and Spanish and English and French), thereby making their programmes more attractive to a wider range of international students. Figures from DAAD suggest that German HEIs currently offer 33 Bachelor's programmes that are taught fully in English, 36 Bachelor's programmes that are offered partly in English and partly in German, and 14 Bachelor's programmes that are taught either partly in Spanish and German or partly in French and German. Since most programmes have at least some element of German, international students are required to demonstrate German language proficiency for these 'international' programmes. These programmes are popular with international students because they are highly structured and intensive student guidance and supervision is provided¹²⁴.

At the institutional level many institutions have introduced both the Bachelor's/Master's structure and at least some programmes taught in other languages. The programmes taught entirely in English are mostly at Master's level. The Technical University Munich currently offers 19 MSc programmes (14% of all MSc

¹²¹ See OBHE (2004).

¹²² Jongsma (2008b)

¹²³ Gardner (2009b)

¹²⁴ OBHE (2008b)

programmes offered in total) completely in English, five of which are offered at the German Institute of Science and Technology in Singapore, and 22 MSc programmes (17% of all MSc programmes offered) partly in German and partly in English.

The Federal Government (through DAAD) has also allocated seed funding for English-taught summer programmes of approximately six weeks at 12 German universities for US students who can use the credits earned towards their US degree. The aim is to help German HEIs to establish themselves in the growing US market for specialised short academic programmes.

Sweden

In July 2007, the Swedish HE system formally adopted a range of measures which has brought it in line with the Bologna Process. These included the development of a three-cycle degree structure, the development of new degree descriptions, aligning the credit system with the ECTS, a new qualifications framework, and the provision of Diploma Supplements for all programmes. Sweden has also recently introduced a new two-year Master's degree (Masterexamen) alongside the one-year (Magisterexamen). This new two-year degree is more research-based and designed to prepare students for further study. In addition, Sweden ratified the Lisbon convention in 2001 and has signed up to the Schengen agreement to allow greater freedom of travel in member countries.

The Swedish government has strongly encouraged and supported the growth of English-language provision, as part of its aim to attract international students and staff to Swedish higher education institutions. In 2008/09 there were over 530 Master's programmes taught entirely in English at Swedish institutions (compared with 330 in 2005) and 75% of such English-taught Master's courses are two-year programmes¹²⁵. These programmes have proved popular with international students who comprise over 60% of enrolments. Almost half of English Master's programmes taught are in technology related subjects, a quarter are in business and social sciences, and around 20% in natural sciences. There are only a very small number of programmes offered in English in other subject areas.

At the undergraduate level there are a number of modules or single courses offered in English, designed for students on international exchange programmes. However, in most institutions it is not possible to complete a full undergraduate degree in English in Sweden since many parts of the programme are likely to require a good command of the Swedish language. Nevertheless, some institutions are now beginning to offer complete programmes delivered wholly in English, and the numbers of such programmes are likely to increase in the future¹²⁶. Some Swedish HEIs also offer bridging programmes for international students and Hogskoleverket research suggests that the majority of students enter employment on completion of these programmes and a high proportion continue with further studies. Many students also enter employment before completing such programmes.¹²⁷

It is not currently possible for Swedish public HEIs to award joint diplomas or degrees with other legal entities either within or outside Sweden, although the Swedish government is keen to change this as soon as possible¹²⁸.

Example 10: Linköping University's Innovative Curriculum Reform Measures

Linköping University's strategic plan has set a target of increasing the number of programmes and courses offered in English at both under- and postgraduate level by 2011. All full undergraduate degree programmes at LiU are currently taught solely in Swedish, so very few international students are enrolled. 253 (or 42%) of the 600 single-subject courses (at Master's and undergraduate level), at LiU are in English. Most of the courses in English are in technology (143 courses) or are offered by the Faculty of Arts and Sciences (86 courses). These courses can be taken on their own by Swedish or international students, or can count towards additional modules for LiU students on full programmes. In some cases, the credits gained can form part of a course of study at another university although a full degree would require enrolment onto a full degree programme. LiU offers 35 Master's degree programmes taught in English, mainly in technology or engineering, and 31 in Swedish. In the IoT (Institute of Technology), nine out of eleven Master's

¹²⁵ Hogskoleverket (2008b)

¹²⁶ Dalarna University, Jönköping International Business School, Malmö University College, Mälardalen University College, IT University of Göteborg and the Stockholm School of Economics offer undergraduate programmes taught in English.

¹²⁷ Hogskoleverket (2008d)

¹²⁸ The issue is under consideration by the Ministry of Education and the most likely outcome is that joint degrees will be allowed in the future)

programmes in electronics, physics and mathematics are offered in English. The IoT plans to increase the number of English-taught programmes in areas that are at the moment offered mainly in Swedish (chemistry programmes, for example) and to further increase the number of engineering programmes taught in English. The Health Sciences Faculty plans to develop new single-courses and 'parts of programmes' taught in English. The LiU strategic plan (2006-11) also highlights the development of joint Master's programmes as a priority for LiU. Although such programmes are restricted in Sweden, LiU has joint Master's programmes but the joint degree can only be awarded by the overseas partners institution(s), whilst LiU students will receive dual degree. LiU is also involved with a number of traditional dual Master's programmes with partners in Europe. In addition LiU is also running a dual Master's distance learning programme in collaboration between LiU and institutions in Sweden, Canada, Australia and the South Africa. An IoT MBA programme is also currently offered in Iran, and negotiations are under way about a similar venture in Saudi Arabia.

In addition, Lund University offers 66 Master's programmes and around 300 short courses taught in English and 707 new international students began a Master's programme at Lund in 2007. Lund has made the development of joint programmes a strategic priority and has introduced several institution-wide measures to support them. A number of distance education programmes are delivered in conjunction with foreign universities. Lund is also involved in around 10 double and multiple degree programmes. The largest of these have between 30 and 40 international students enrolled, in addition to Swedish students from Lund. The majority of the programmes are offered with partner institutions from Nordic countries or from countries across Europe. There is one 'international' Global Studies degree offered with Fudan University in China. 37 international students are currently registered on this programme, which was developed through an existing collaboration, namely the Nordic Centre at Fudan University. The Centre was established in 1995 in co-operation between 23 Nordic universities and China's Fudan University in Shanghai.

Netherlands

The Netherlands is also highly compliant with the requirements of the Bologna Process and was one of the first countries in Europe to adopt the Bachelor/Master structure (in 2002). The Dutch Ministry of Education has recently developed an 18-month Master's programme to encourage international co-operation via joint degree programmes. Currently, most Master's programmes in the Netherlands have a length of either one or two years. In addition applied Bachelor's programmes have a strong international student profile and many degrees offer work internships.

Dutch institutions offer the highest number of English language programmes in Europe (over 1,300 at all levels), and these programmes have attracted significant numbers of non-EU/EEA students assisted by the increased level of marketing of Dutch HE, which has raised awareness of English language provision (which began in the 1950s)¹²⁹. At both undergraduate and postgraduate level over 50% of all programmes are taught in English, and there are also 358 non-degree programmes offered in English. The most popular subject areas for English language programmes are economics, language & culture, behaviour & society, technology and health care. Students at Dutch universities are thus able to pursue further study or employment at a range of different universities within Europe and beyond.

At the institutional level the University of Leiden offers a range of English-taught postgraduate courses in over 80 subjects, including over 100 Bachelor's programmes, 60 full Master's and 15 full MPhil programmes, many of which are offered in partnership with other Dutch universities. Almost all Master's, MPhil and PhD programmes are taught in English with the exception of some programmes focused on Dutch law or literature. At the University of Maastricht, half of Bachelor's programmes and 82% of Master's programmes are offered in English. In addition, many other programmes contain at least some element of English. University College Maastricht - a liberal arts college that is part of UM - offers Bachelor's programmes fully taught in English where students can follow an individualised problem-based curriculum and specialised academic support, with programmes based on small group seminars rather than large lectures. Approximately 50% of its students are international from 28 countries, and 30% of the international students are German.

As in many other countries, Dutch higher education institutions are noticing that international summer schools are becoming increasingly popular as a means of promoting internationalisation. Utrecht University runs credit-bearing programmes in 60 subjects in collaboration with Hogeschool Utrecht (Utrecht's college of

¹²⁹ OBHE (2006b), op cit.

higher vocational education) and the Utrecht School of the Arts. Summer schools are seen as a good way of recruiting the best international Master's students¹³⁰.

¹³⁰ Innovations Report (2008)

4. Conclusions and Implications of the Research Findings for the Danish Higher Education Sector

This findings from this desk research project demonstrate a range of trends related to international student mobility that have implications for both the Danish higher education sector and Danish higher education institutions. These trends highlight the growing importance and complexity of international student recruitment worldwide.

Full-Degree Mobility

International diploma or full-degree student mobility has grown significantly in recent years and is likely to do so for the foreseeable future as demand for high quality educational opportunities outstrips supply. This suggests that there is considerable scope for all comparator countries to increase international student recruitment beyond traditional regional markets to students in non-EU/EEA countries. However, despite this growth in mobility, the market shares of key source countries (including major players such as Germany, the UK and Australia) are declining. The nature of student flows is becoming more complex and volatile as students are provided with a wider range of options for overseas study in emerging regions such as East Asia and the Middle East in addition to traditional provider countries. All countries and institutions must recognise that this competition is only likely to increase in the future. Unless institutions are sufficiently committed to recruiting and supporting international students, they are likely to go elsewhere.

Implications for Denmark: Danish institutions must be fully committed to recruiting and supporting international students, meeting their needs for shorter and more vocationally orientated programmes, and to establishing a reputation for quality and value-for-money or students are likely to go elsewhere. Countries and institutions also need to recognise their position in the global market, and target specific sections of the international student recruitment market.

Short-Term Mobility

There is evidence of a decline in short-term or credit mobility in all comparator countries, as the impact of the Bologna reforms and the increased cost of higher education makes it more difficult in terms of time and cost to travel abroad for short periods.

Implications for Denmark: The Danish HE sector needs to develop innovative approaches to facilitate and improve the popularity of this type of mobility in the future, such as integration of overseas study into degree programmes (as in Germany). In the long term, short-term mobility is likely to decline further so it will be important to support this type of mobility as much as possible (e.g. via financial support).

Strategic Approaches to Internationalisation

In response to this increasingly competitive environment, comparator countries all have well-established internationalisation strategies at the national level and the Danish and German strategic approaches are closely linked with globalisation objectives in which educational objectives are closely aligned with trade, cultural and economic development policies. Student mobility - both inward and outward – is now widely perceived to be one of the key elements in the goal of improving economic competitiveness in a global knowledge economy as it is closely linked with skilled migration and targets for improving the quality of scientific output. However, there is some evidence (in Sweden and Germany in particular) that national strategic approaches are not widely put into practice at institutional level as universities and colleges are finding it difficult to develop their international activities. A combination of limited experience of actively recruiting international students and reductions in public funding for higher education have meant that HEIs still require significant initial government support and direction to enhance their international activities beyond traditional inter-regional academic linkages.

Implication for Denmark: The Danish higher education sector shares these challenges, but there is an opportunity for Danish institutions to gain competitive advantage should they sharpen their strategic focus and implementation of their internationalisation strategies. It will become increasingly important for the implementation of international strategies that they are regularly reviewed and updated as the global context changes.

Marketing and Recruitment Strategies

National level marketing activities are becoming increasingly important elements of internationalisation strategies, particularly when there are targets to increase international student recruitment. Some countries and institutions have historically high levels of visibility and strong reputations for quality and value for money worldwide (e.g. the USA, and the UK) whilst most other countries are focusing on national branding and enhancing the visibility and awareness of their HE sectors through targeted marketing activities in different parts of the world using national agencies.

Implications for Denmark: The Danish government via The Danish Agency for International Education is taking significant steps to improve the marketing of Danish higher education to non-EU/EEA students, and investment in national-level marketing activities needs to continue as the comparator countries are continuing to invest in their own national agencies. At the institutional level there is an opportunity for Danish universities and colleges to gain competitive advantage through improving their own marketing strategies, since these are not yet widely developed in most countries.

Student Finance and Tuition Fees

The financial aspect of full-degree international mobility is becoming increasingly important to potential students (and their funders) as cost-aware international students seek to balance the cost of the total study package (fees, living costs, working regulation, etc.) with the perceived value of their overseas study experience (educational quality, employability, etc.)

Implications for Denmark: It is crucial that the Danish higher education adequately funds and promotes its student finance options at national and institutional level to prevent competitor countries recruiting the most talented students. It will also become increasingly important that national and institutional marketing activities are able to reinforce Denmark's reputation for a high quality educational experience and value for money.

Immigration and Visa Policies and Employment Regulations

Most countries which recruit significant numbers of students from outside the EU/EEA have recently tightened their immigration requirements to ensure that only sufficiently qualified students that are able to support themselves financially during study are able to receive study visas. For international students who do not receive financial support, the opportunities for casual and permanent employment both during and after study are becoming an increasingly important aspect of their decision on where to study.

Implications for Denmark: Denmark needs to continue to ensure that potential international students are aware of potential employment opportunities during and after study and to ensure that regulations are attractive and understandable to students who wish to become skilled migrations. Its nationally coordinated approach to immigration is very helpful in this regard and a move towards centralised applications for overseas students as in Germany and Sweden would also help to streamline the application process.

International Partnerships and Transnational Education

International partnerships are becoming an important means to facilitate both short-term and full-degree mobility at national and institutional levels, either through exchange agreements or joint provision (including twinning arrangements and joint or dual degrees). Germany has a well established reputation in this area and has invested significant sums (via the DAAD) to support institutional transnational education activities for both academic and financial reasons. German institutions are also engaging in TNE independently. The Netherlands is also beginning to encourage more institutions to become more active in this area through engaging in collaborative agreements and establishing international study centres.

Implications for Denmark: Denmark has begun to develop a more outward-looking approach through its China strategy and other overseas links, but the Danish HE sector will need to become more active in transnational education to complement its existing partnership activity, to help provide potential students with more flexible and cost-effective ways of participating in Danish higher education.

Quality Assurance and Services and Support for International Students

International student perceptions of their overall study experience are becoming very important in student decision-making on where to study. As Sweden, Germany and Denmark introduce tuition fees for non-EU/EEA students they beginning to focus on improving services for international full-degree students to help improve the international reputation of their HE sector. Institutions in many European countries have limited

experience of recruiting and supporting full-degree international students as they are set up for dealing with home students and exchange students. Australia is a world leader in QA for international education although the Netherlands with its Code of Conduct that seeks to provide minimum standards for recruitment and support for international students, and its national-level investment in improving the quality of student services provides a useful European model to emulate.

Implications for Denmark: It is important that The Danish Agency for International Education and the Danish HE sector takes QA for international student experience as seriously as possible, since it is one of the key elements that contributes to a positive value for money reputation. This will require significant investment from both the national government and individual institutions. Developing specific fees for student support (as in Germany) could be an option worth considering, although only if the services provided can be improved considerably.

Curriculum Reform and Foreign-Language Provision

Finally, all four comparator countries are engaged with curriculum reform to help attract international students, such as Bologna compatibility, focused Master's provision, an increase in English-taught provision and shorter more vocational programmes. The innovative learning approaches used in institutions such as Maastricht in the Netherlands are also popular with overseas students as are curricula that are focused on preparing students for employment in international companies. Germany also provides a good example of using its strong international reputation to develop internationally focused provision in key science and technology subjects.

Implications for Denmark: Although highly Bologna compliant, the Danish higher education sector could learn a great deal from the Netherlands which has developed a wide range of internationally focused and vocational Master's programmes which are popular with international students. Other interesting initiatives include the growth of double degree programmes and international foundation courses for non-EU/EEA students, and the development of summer schools (in Germany and the Netherlands) and short modules (in Sweden) to attract international students who wish to study abroad for less time. Danish institutions should follow these developments closely and assess their suitability for the Danish context.

Sources of Information

A: General

1. Academic Cooperation Association (ACA) (2006) Perceptions of European Higher Education in Third Countries. Outcomes of a Study by the Academic Cooperation Association (ACA) Brussels: European Commission.
2. Altbach, P. (2004). 'Higher Education Crosses Borders', *Change*, 36(2), pp. 18-24.
3. Altbach, P.G., Kelly, D. and Lulat, Y.G.M. (1985) *Research on Foreign Students and International Study: An Overview and Bibliography*. New York: Praeger
4. Banks, M., Olsen, A. and Pearce, D. (2008) *Global Student Mobility: An Australian Perspective Five Years On*. Canberra: IDP Education Pty Ltd.
5. Bennell, P. and Pearce, T. (2008) *The Internationalisation of Higher Education: Exporting Education to Developing and Transitional Economies*. Brighton: Institute of Development Studies (IDS).
6. Bohm, A., Follari, M., Hewett, A., Jones, S., Kemp, N., Meares, D., Pearce, D. and Van Caeter, K. (2004) *Vision 2020: forecasting international student mobility - a UK perspective*. London: British Council.
7. Carlsson, J.; Jensen, H-P.; Nyborg, P.; Skulason, P.; Uronen, P. (2009). *The Internationalisation of Higher Education: The Nordic Experience*. London: OBHE, July 2009.
8. CIRIUS (2008). *English Summary: Student mobility in higher education 2006/07*. Copenhagen: CIRIUS
9. Council for Industry and Higher Education (CIHE) (2008) *Global Horizons and the Role of Employers*. CIHE: London.
10. CVCP (2000). *The Business of Borderless Education: UK Perspectives*. London: CVCP.
11. Daniel, J. (2004). *Education Across Borders: What is Appropriate?* Available at: http://www.col.org/speeches/JD_0412EdinburghBCTx.htm
12. De Wit, H. (2008) 'Changing Dynamics in International Student Circulation: Meanings, Push and Pull Factors, Trends and Data' in de Wit, Hans et al. (2008). *The Dynamics of International Student Circulation in a Global Context*. Rotterdam: Sense Publishers.
13. Fielden, J. (2007). *Global Horizons for UK Universities*. London: CIHE.
14. Fielden, J., Middlehurst R., and Woodfield S. (2007). *Global Horizons for UK Students*, London: CIHE.
15. Garrett, R. and Verbik, L. (2004). *Transnational Delivery by UK Higher Education, Part 1: data & missing data*. London: OBHE.
16. Gill, J. (2008) 'Lower fees for foreign students' *Times Higher Education*, 25th September 2008
17. Institute of International Education (IIE) (2008) *Economic Impact of International Students 2008*. New York: IIE
18. International Graduate Insight Group (2008) *StudentPulse 2008*. London: I-Graduate.
19. JWT Education (2007). *Promoting what we've got – encouraging people to study in the UK*, presentation at the 4th Annual International Student Conference, March 2007.
20. Kelo, M. (ed.) (2008) *Beyond 2010. Priorities and challenges for higher education in the next decade*. ACA Papers on International Cooperation in Education. Bonn: Lemmens.
21. Kelo, M., Teichler, U., and Wächter, B. (eds.) (2006). *EURODATA: Student mobility in European higher education*. Bonn: Lemmens
22. Knight, J. (2005). *Borderless, offshore, transnational and cross-border education: definition and data dilemmas*. OBHE Report No. 34. London: OBHE.
23. Lasanowski, V. (2009) *International Student Mobility: Status Report 2009*, London: OBHE, June 2009.
24. Lenton, P. (2007) *Global Value. The value of UK education and training exports; an update*, September 2007.
25. Mazzarol, T., & Soutar, G. (2002). "'Push-Pull" Factors Influencing International Student Destination Choice'. *The International Journal of Educational Management*, 16, 82-90.
26. Middlehurst R. and Woodfield, S. (2007). *Responding to the internationalisation agenda: implications for institutional strategy*. York: Higher Education Academy.
27. OECD (2004) *Internationalization and Trade of Higher Education: Opportunities and Challenges*. Organization for Economic Co-operation and Development: Paris.
28. OECD (2008). *Education at a Glance 2008*. Paris: OECD.
29. Rogers, T. & Kemp, N. (2007). *Towards a Danish International Strategy: A Study for CIRIUS*. Copenhagen: CIRIUS.
30. Santiago, P., Tremblay, K., Basri, E., and Arnal, E. 'Internationalisation: Shaping Strategies in the National Context' in Santiago, P., Tremblay, K., Basri, E., and Arnal, E. (2008). *Tertiary Education for the Knowledge Society: Volume 2. Ch 10*. Paris: OECD.
31. Sastry, T. (2006) *How exposed are English universities to reductions in demand from international students?* Oxford: Higher Education Policy Institute

32. Scott, P. (1998) 'Massification, Internationalization and Globalization' in Scott, P. (ed) The Globalization of Higher Education Buckingham UK: The Society for Research into Higher Education & Open University Press.
33. Shepherd, J. (2008). The New Seekers. The Guardian, 18th March 2008.
34. Sussex Centre for Migration Research and Centre for Applied Population Research (2004) International Student Mobility, report commissioned by the HEFCE, SHEFC, HEFCW, DEL, DfES, UK Socrates Erasmus Council, HEURO, BUTEX and the British Council. Bristol: HEFCE
35. Teichler, U. (2008). Student Mobility: Where do we come from? Where are we? Where are we going to inside the EHEA? Presentation at the ACA Annual Conference 2008, Tallinn, 16-17 June 2008.
36. The Observatory on Borderless Higher Education (OBHE) and Kingston University (2009). An Analysis of National and Institutional Approaches for Attracting International Students and Facilitating Internationalisation in the United Kingdom and Selected European Countries., Research Series Number 3, London: UK Higher Education Europe and International Units.
37. UNITE (2007) The Unite Student Experience Survey 2007. Bristol: UNITE. Available at: <http://www.unite-group.co.uk/Attachments/000171/Student%20Experience%20Report%202007.pdf>
38. Verbik, L. and Lasanowski, V. (2007). International Student Mobility: Patterns and Trends. London: OBHE
39. Vickers, P. and Bekhradnia, B. (2007) The Economic Costs and Benefits of International Students. Oxford: Higher Education Policy Institute
40. Wächter, B. & Maiworm, F. (2008a), English-Taught Programmes in European Higher Education. The Picture in 2007. Bonn: Lemmens, 2008.
41. Wächter, B. (2008) 'Mobility and internationalisation in the European Higher Education Area' in Kelo, M. (ed.) (2008) Beyond 2010. Priorities and challenges for higher education in the next decade. ACA Papers on International Cooperation in Education. Bonn: Lemmens.

B: Country Specific

Denmark

1. Copenhagen Post (2009a). 'International students find Danes not so friendly', Copenhagen Post, 6th March 2009. Currently unavailable online.
2. Copenhagen Post (2009b). 'Minister eager to recruit elite international students'. Copenhagen Post, 24th April 2009. Available at: <http://www.cphpost.dk/news/politics/90-politics/45488-minister-eager-to-recruit-elite-international-students.html>
3. The Danish Government (2006) Progress, Innovation and Cohesion - Denmark in the Global Economy. Available at: http://www.globalisering.dk/multimedia/Pixi_UK_web_endelig1.pdf
4. Jongsma, A. (2008a) 'Erasmus Mundus on a collision course?' University World News, 31, 8th June 2008. Available at: <http://www.universityworldnews.com/article.php?story=20080605160500554>
5. Jongsma, A. (2008b) 'Danglish alarms the Danes', University World News, 24, 20th April 2008. Available at: <http://www.universityworldnews.com/article.php?story=20080418094434990>
- Ministry of Education and the Ministry of Science Technology and Innovation (MSTI) (2009) 7th May 2009. Recent figures: Labor Grants for foreign students. URL: <http://vtu.dk/nyheder/pressemeddelelser/2009/ugens-tal-arbejdskraftstipendier-til-udenlandske-studerende/ugens-tal-arbejdskraftstipendier-til-udenlandske-studerende>
6. Ministry of Education and the Ministry of Science Technology and Innovation (MSTI) (2004) Enhanced Internationalisation of Danish Education and Training. Copenhagen: Danish Ministry of Education. URL : <http://pub.uvm.dk/2004/internationalisation/>
7. The Observatory on Borderless Higher Education (OBHE) (2008a) Springboards to increase the competitiveness of its higher education system? Denmark launches a China Strategy and enters into a series of international research partnerships, 20th March 2008, London: OBHE.
8. The Observatory on Borderless Higher Education (OBHE) (2007) OBHE Breaking News, 3rd May 2007. London: OBHE.
9. The Observatory on Borderless Higher Education (OBHE) (2006a) Strengthening international competitiveness? Reshaping Danish higher education for the future, 6th October 2006. London: OBHE.
10. The Observatory on Borderless Higher Education (OBHE) (2004) New Danish internationalisation strategy marks the end of free education for international students, 5th May 2004. London: OBHE.
11. Slattery, L. (2009) 'Great gains for Danes', University World News, 81, 21st June 2009. Available at: <http://www.universityworldnews.com/article.php?story=20090618193931537>

Germany

1. AFP (2008) 'German universities struggle to keep foreign students', AFP, 30th April 2008. Available at: http://afp.google.com/article/ALeqM5gQ_xk936jOQTJ0UG5Zgw2IoGpBqQ
2. Berchem, T. (2007) 'Internationales Bildungsmarketing', Paper presented at the meeting of the German Federal Parliament's Board of Education, Research and Technology Assessment, 7 November 2007.
3. Europe Unit (2009) 'Bologna Process in the firing line' This Month in Europe, June 2009. London: Europe Unit.
4. Gardner, M. (2009a) 'Bologna process gets nod of approval', University World News, 63, 15th February 2009. URL: <http://www.universityworldnews.com/advancedsearch.php?mode=search&country=82>
5. Gardner, M. (2009b), 'Success for export of study programmes', University World News, 87, 2nd August 2009. URL: <http://www.universityworldnews.com/article.php?story=20090731103938540>
6. Gardner, M. (2008a), Bologna - still making slow progress, University World News, 47, 5th October 2008. URL: <http://www.universityworldnews.com/article.php?story=20081002151228985>
7. Gardner, M. (2008b), German students becoming increasingly mobile, University World News, 26, 4th May 2008. URL: <http://www.universityworldnews.com/article.php?story=20080501171122245>
8. German Academic Exchange Service (DAAD) and the Higher Education Information System (HIS) (2009) Wissenschaft weltoffen 2009, URL: <http://www.wissenschaft-weltoffen.de/>
9. German Academic Exchange Service (DAAD) (2008) Qualität durch Internationalität. Das Aktionsprogramm des DAAD 2008-2011 (Bonn: DAAD).URL: http://www.daad.de/presse/de/aktionsprogramm_9_07_08.pdf. Last accessed 13 August 2008.
10. German Academic Exchange Service (DAAD) (2007) Studying in Germany: A Guide for International Students, 2nd Edition. Bonn: DAAD. URL: http://www.daad.de/imperia/md/content/de/deutschland/downloads/studying_in_germany_2.pdf
11. The Observatory on Borderless Higher Education (OBHE) (2008b) Coherent and competitive? Germany strengthens its transnational education strategy with two new German-backed universities in Vietnam and Lebanon, 8th October 2008. London: OBHE.
12. The Observatory on Borderless Higher Education (OBHE) (2005b), OBHE Breaking News 18, 11th March 2005.

Sweden

1. Hogskoleverket, Swedish National Agency for Higher Education (2008a) Swedish Universities and University Colleges. Short Version of Annual Report 2008. Stockholm: Hogskoleverket. URL: <http://www.hsv.se/download/18.6923699711a25cb275a80002979/0829R.pdf>
2. Hogskoleverket, Swedish National Agency for Higher Education (2008b) International students in Sweden, Report 2008: 7R. Stockholm: Hogskoleverket. URL: <http://www.hsv.se/aboutus/publications/reports/reports/2008/internationalstudentsinsweden.5.2e46db2411b118a731b8000593.html>
3. Hogskoleverket, Swedish National Agency for Higher Education (2008c) Internationalisation and quality assurance, Report 2008: 15 R. Stockholm: Hogskoleverket. URL: <http://www.hsv.se/aboutus/publications/reports/reports/2008/internationalisationandqualityassurance.5.2e46db2411b118a731b8000417.html>
4. Hogskoleverket, Swedish National Agency for Higher Education (2008d) Bridging programmes for international graduates, Report 2008: 30 R). Stockholm: Hogskoleverket. URL: <http://www.hsv.se/aboutus/publications/reports/reports/2008/bridgingprogrammesforinternationalgraduates.5.6d5fe98611d3f068f14800099911.html>
5. Hogskoleverket, Swedish National Agency for Higher Education (2005) Report 2005:27R, p.31. URL: <http://www.hsv.se/aboutus/publications/reports/reports/2005/theinternationalisationofhighereducationin sweden.5.539a949110f3d5914ec800069370.html>
6. Landes, D. (2008) 'No more free education for non-Europeans', The Local, 23rd June 08. Available at: <http://www.thelocal.se/12594/20080623/>
7. The Observatory on Borderless Higher Education (OBHE) (2005a) Sweden releases report on internationalisation in higher education - Scandinavian states move towards adopting a more 'sustainable' model, but at what cost?', 22nd June 2005. London: OBHE.
8. Parafianowicz, L. (2009). 'Foreign student fees delayed until 2011', The Local, 12 May 09. Available at: <http://www.thelocal.se/19410/20090512/>
9. Sillitoe, W (2009) 'Nordic pair eye a slice of rich markets overseas abroad market', Times Higher Education, 2nd April 2009 Available at: <http://www.timeshighereducation.co.uk/story.asp?sectioncode=26&storycode=405993>

10. Statens Offentliga Utredningar (2008) Studieavgifter i högskolan. URL: <http://universityusability.files.wordpress.com/2008/07/9316e296.pdf>. Last accessed 22 September 2008.

The Netherlands

1. Europe Unit (2008) 'Internationalisation in the Netherland', This Month in Europe, March 2008. London: Europe Unit.
2. Hodges, L. (2009) 'Go Dutch, save money: British students can take degrees in English at the University of Maastricht and pay lower fees than at home', The Independent, June 18th 2009.
3. Innovations Report (2008), Summer schools in Europe are increasingly popular, 13th May 2008. URL: http://www.innovations-report.de/html/berichte/bildung_wissenschaft/bericht-109805.html
4. Netherlands Organization for Internationalization in Higher Education (Nuffic) (2009) Internationalization in higher education in the Netherlands: key figures 2009. The Hague: Nuffic. URL: <http://www.nuffic.nl/international-organizations/docs/keyfigures/Key%20figures%202008.pdf>
5. Netherlands Organization for Internationalization in Higher Education (Nuffic) (2008) New brand puts Dutch higher education on the map, 22nd January 2008. URL: <http://www.nuffic.nl/home/news-events/news-archive/news-archive-2008/january/new-brand-puts-dutch-higher-education-on-the-map>
6. Netherlands Organization for Internationalization in Higher Education (Nuffic) (2008c) 'Justitie verlaagt drempels voor internationaal talent', Transfer Magazine, October 2008, pp. 12-13. URL: http://www.transfermagazine.nl/documenten/Justitie%20verlaagt%20drempels%20internationaal%20talent%20-Transfer1-12-13.pdf/at_download/file
7. The Observatory on Borderless Higher Education (OBHE) (2009a) OBHE Breaking News Issue 166, 13th March 2009. London: OBHE
8. The Observatory on Borderless Higher Education (2008c) Building strength through collaboration? Universities in the Netherlands to expand international partnerships and student recruitment efforts. 6th November 2008. London: OBHE
9. The Observatory on Borderless Higher Education (OBHE) (2006b) A move up the value chain? The Netherlands adopts a code of conduct for international education, 18th May 2006. London: OBHE