

based study abroad programs. Among students whose gender was reported by their institution, 40 percent were men, compared to 35 percent among study abroad students in traditional programs awarding academic credit, as documented in Open Doors. While men's participation in both forms of education abroad remain low, the slightly higher proportions engaging in non-credit education seem to align with anecdotal reports that male students are more apt to go abroad when they perceive a practical career benefit of their international experience.

International students also value work experience to complement their studies, with more than 12 percent of the nearly 1 million international students in the United States in 2014–2015 engaging in Optional Practical Training (OPT).

THE VALUE OF INTERNATIONAL CO-CURRICULAR WORK EXPERIENCE

In the US domestic context, internships and work experience are widely recognized as important components of higher education programs and a vital way for students to gain work experience and practical skills that go beyond what they can learn in a classroom. Indeed, some academic programs require their students to complete internships as an integral part of their studies, as well as to prepare them for jobs following graduation. For international students, work experience in the United States provides similar educational benefits and provides them with critical skills in their field that will ultimately help them navigate a path to the working world in their host country, back home, or in a third country. When international students stay in the host country, they contribute their skills and knowledge to that country's development. In cases when international students ultimately work in another country, they help strengthen international cross-border ties in research and business.

Growing numbers of students are seeking out internships and work experience in countries outside of where they are pursuing their degree. Global internships are one way to make education abroad more meaningful for students by reflecting the reality of how students will use their international skills following graduation. While it is nice to study art in Florence, it might be better for a student's resume to work as part of a team building wells in Honduras, or to contribute to the development of a marketing strategy

for a company in China. Such international experiences still provide the intercultural "soft" skills and transformative personal experiences that are familiar to many in the study abroad field, while also providing the opportunity for students to gain practical "hard" skills in a work context that can be easily translated to the job market down the line. ■

The International Education Market: Some Emerging Trends

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International student mobility has continued to surge, as reflected in recent data from most major destination countries. Changes are occurring, some large and some subtle, and a selection of these trends is briefly discussed below. The major exception to strong enrollment growth in recruitment has been the United Kingdom, where tough immigration regulations have impacted directly on international student numbers.

THE CHINA QUESTION

How many Chinese students will be studying internationally 10 years from now? The answer is very important, as numerous universities around the world have high dependency on recruiting Chinese students. The total number of Chinese studying internationally in 2012 was estimated to be over 700,000, three times more than the number of students from the second country, India. While the increasing capacity of Chinese universities might reduce outward mobility, demographic change will likely be a major factor, given that the number of young Chinese of higher education age is projected to decline significantly. However, currently international enrollment of Chinese students has continued to grow, to most leading destination countries: Australia up 8 percent, Germany 8 percent, and the United States 11 percent. Chinese student numbers in the United Kingdom were up about 5 percent in 2013, with over half of the 17,300 new Chinese undergraduates came through some form of transfer arrangement—students commence in year 2 or 3 in the UK university after initial years in

China. Further, many of these transferring undergraduates progress to a master degree program.

INDIAN MOBILITY CONTINUES

Indian student enrollments were recently up nearly 30 percent in the United States, Australia (up 20 percent), and Germany (up 21 percent). In contrast, the United Kingdom saw a fall of over 12 percent—estimates suggest that Indian enrollment declines probably resulted in a loss of some \$700 million to the UK economy in 2013.

The destination choice of young Indian students aligns closely with immigration policies and access to post-study employment. That is not to say that young Indians seek long-term migration; merely, they want to consolidate their academic studies through work experience. For example, in the United States, some 32,000 Indian students, registered in a US university, are following temporary employment programs.

Demand for international study by young Indians is likely to remain buoyant, particularly at the postgraduate level. This is driven by the rapid increase of students exiting upper secondary schools—total higher education enrollment in India is projected to be 40 million by 2020, up from about 32 million in 2014.

Dependence on national scholarship programs can be a high risk, particularly for those universities that have many such students; governments can turn them off as fast as they start them up.

SOME OTHER MOBILITY TRENDS

Saudi enrollment to US universities has continued to grow fast (up 45 percent over the last 3 years, to about 60,000), whereas for Australia and the United Kingdom there have been declines. In Brazil, where the “Science without Borders” program now faces cuts, many Saudi and other Middle East students are supported through scholarships from their governments, rather than from their own personal funds. Dependence on national scholarship programs can be a high risk, particularly for those universities that have many such students; governments can turn them off as fast as they start them up.

Considering a few other countries with large numbers of mobile students—current and potential, one observes the following:

- Outward mobility of South Korean students has been

fluctuating (over 110,000 students studying internationally), with declines reported to the United States (currently about 64,000 students), Japan (16,000), and Australia (nearly 6,000), but there has been enrollment growth to the United Kingdom (nearly 4,500);

- The outward mobility of Nigerian students continues to increase, with the United Kingdom the main destination (over 19,000 enrollments); Ghana (12,000); the United States (nearly 10,000); and with others studying in Malaysia (2,700); Canada (2,500); and South Africa (2,300). There were reportedly also 3,600 Nigerian students studying in Ukraine in 2012;

- The number of Vietnamese (54,000), Iranian (50,000), and Malaysian (nearly 60,000) students studying internationally are all on the increase;

- There has been a growing number of Russian students studying internationally (over 50,000), with Germany hosting the most (14,500), followed by the United States (5,600);

- Indonesia appears to have good potential, given the size of the country; however, in spite of favorable economic growth and increasing university participation rates, international mobility has remained modest (approximately 40,000).

A noticeable recent trend in international enrollments to UK universities has been a shift away from large-scale recruitment from South Asia to one-year master programs (down 42 percent over last 3 years), to reinvigorated growth in undergraduate enrollments from China, Singapore, Hong Kong, and Malaysia (up 24 percent). There has also been recent decline in undergraduate enrollments from several EU countries to the United Kingdom (including Germany and France)—is this response to the United Kingdom’s higher university fees, demographic change, or the UK government’s somewhat negative messages about its EU membership?

WILL EXPANDED CAPACITY IN LOWER INCOME/MEDIUM INCOME COUNTRIES RESULT IN DECREASED OUTWARD MOBILITY?

There is no evidence that this is happening, rather the opposite; the nature of demand continues to evolve, resulting in greater diversification of subject, level and modes of study. Such patterns have been apparent in the more wealthy countries for many years, where outward mobility has continued to increase—for example, US students are the second largest group of international students in the United Kingdom, and not just for study abroad. Similarly, the United Kingdom has experienced steady enrollment increases from Australian, Canadian, Swiss, and Norwegian students.

Other examples include the United States, where the number of European students has grown steadily. In Ma-

Malaysia, while policy changes have led to expanded local university provision, the number of Malaysians studying in the United Kingdom and the United States has continued to increase.

INCREASING COSTS, INCREASING COMPETITION

As competition to attract new international students increases, universities need to invest more to support recruitment, and this has driven up their costs. In Australia, the total per new enrollment could average over \$4,000, and for the United Kingdom between \$3,000 and \$5,000. These costs include international staff support, investment in marketing, agent commission, and for a few universities, overseas representative offices.

Private education companies also provide services to support international recruitment through various forms of partnerships with universities, including delivering foundation and language programs; leading companies—include Kaplan Inc. (United States), Navitas Ltd. (Australia)—and INTO University Partnerships (United Kingdom).

TWINNING AND ARTICULATION ARRANGEMENTS

The growth of transnational education (TNE) has contributed to greater international mobility, with many TNE programs designed to encourage students to transfer at some stage to the awarding university's home campus (arrangements include articulation, twinning, and/or the recognition of prior learning). The motivation for both students and the universities involved being both educational and financial, the period of time studying internationally can vary from a few weeks to two or three years. In addition to the transfer provisions for recruiting Chinese students to the United Kingdom (mentioned above), many other arrangements are involved. For example, in India, several US and UK universities offer degree programs with transfer arrangements; typically, US universities offer master programs that might involve one year in India, with the second in the United States, while most of the UK programs are at the undergraduate level. Similar examples are apparent in Malaysia, where for instance Sunway University has transfer arrangements with Monash University, Australia.

New flexible delivery and support arrangements are also available for doctoral studies, with split site PhDs, transfer arrangements, residential programs and greater use of ICT for supervisory support. For example, over 4,600 students were following UK doctorate programs in their own country in 2013.

CONCLUSION

All indications are that international student mobility is likely to continue to grow over the next decade, and at rates of 5 percent per year or more. While demand will almost

certainly be led from China and India, outward mobility from other countries is increasing significantly. Opportunities presented by strong growth have resulted in many more countries and institutions seeking to recruit internationally. While this has offered greater study choice for students, competition has also driven up the costs of recruitment. The growing dependence of many countries and their universities on international students, the speed and variability of market evolution, and the strong competition, all indicate the need for greater understanding—better market research and intelligence, and greater consideration of why international students might choose particular destinations, and what might influence this choice. ■

The Value of Administrative Staff for Internationalization

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Studies on internationalization usually focus on students and at best academics. But when you think about it: Who is the international student's first contact at the host university? It is usually not the professor and most likely not even the international office staff, but rather core administrative and service staff such as the porter or the housekeeper in the dormitory. For outbound students, it is not necessarily a professor with whom the students deal when organizing their studies abroad, but rather an administrator. Nevertheless, most strategies and analyses ignore administrative staff as a crucially relevant component (administrative staff is defined here as staff that is predominantly not engaged in academic-scientific work.) This trend is slowly changing. A good example is the Erasmus Impact Study, which explicitly investigated the role of administrative staff in mobility and internationalization. Administrative staff also gets more focus at the political level: the Bologna Follow Up Working Group stressed in its report that in future mobility programs, special efforts will be needed for administrative staff. If we concede this point, measuring the effectiveness of internationalization activities for this target group becomes pivotal.

In a large-scale study called InHoPe, which started in 2014 and was funded by the German Federal Ministry of Education and Research, we tackle this question and aim