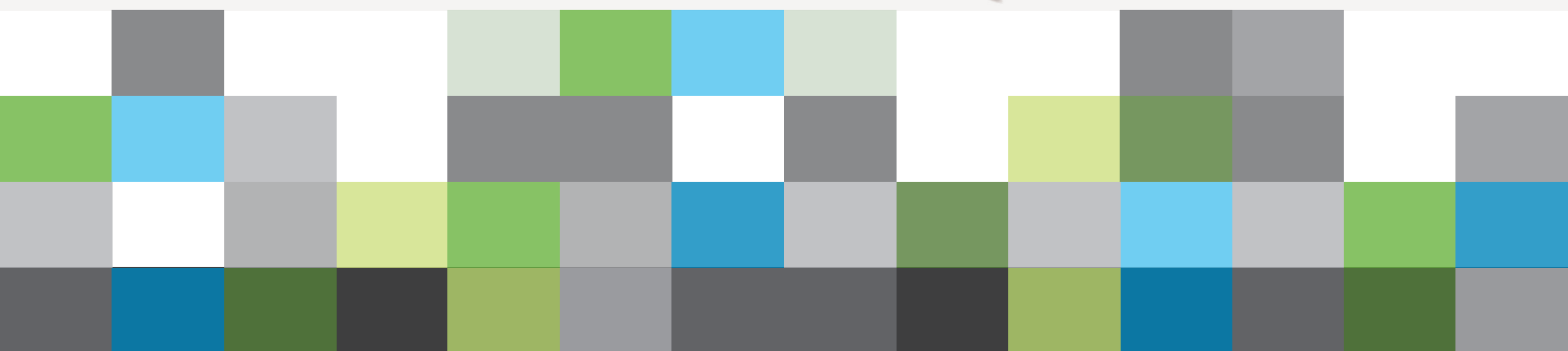


DO POLITICAL EVENTS IN HOST COUNTRIES AFFECT INTERNATIONAL EDUCATION ENGAGEMENT?

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1. INTRODUCTION

Recent shifts in the political realities in the UK and the US have challenged the role of universities as centres of knowledge creation with global relevance. In an address at the Royal Irish Academy in 2010, Drew Faust observed:

*"As the world oscillates between openness and insularity, many worry that we are entering a more inward-looking period, when states begin to resurrect old boundaries and national concerns trump international aspirations."*¹

Since then, the "inward-looking period" has become a reality and right-leaning policies and sentiments are gaining momentum across nations in Europe and North America. In a world defined by "post-truth" policymaking, the role of universities and their impact appear diminished².

Recent shifts in the political landscape of two largest players in international education have engendered worry and anxiety within the academic community. And while it is too early to assess the exact impact of the election of Donald Trump as US President and the UK's 'Brexit' from the European Union (EU), there are some early signs of reduced student interest.

¹ Faust, Drew (2010), The Role of the University in a Changing World; June 30, 2010, Royal Irish Academy, Trinity College, Dublin; <http://www.harvard.edu/president/speech/2010/role-university-changing-world>.

² Fingerhut, H. (2017), Republicans Sceptical of Colleges' Impact on US, But Most See Benefits for Workforce Preparation; Pew Research Centre <http://www.pewresearch.org/fact-tank/2017/07/20/republicans-skeptical-of-colleges-impact-on-u-s-but-most-see-benefits-for-workforce-preparation/>.



2. KEY FINDINGS

This section summarises the main findings of this study. It starts with a brief historical overview of policies that have affected international student recruitment in Australia and the UK. While many of the comparisons are limited to the higher education sector (due to data availability), the implications can be extended to the other education sectors.

International comparisons were widened to include other English-speaking destinations such as the US, New Zealand and Canada. This paper examines the impact of the policy responses to the events of 9/11 and the global financial crisis on international student enrolments. It also looks at some of the early indications of the impact of Brexit and the travel ban imposed by the Trump administration on international student demand.

The study concludes with findings from interviews with thought leaders from across the world, and draws the shape of international education in the years to come. The section below summarises the main findings based on key themes.

2.1 Impact of domestic higher education policies on international enrolments in Australia and the UK since the 1980s

- Government policies in Australia and the UK have incentivised and supported the expansion of international student recruitment since the 1980s. Reductions in public spending on universities manifested in the removal of grants for international students.
- Removal of subsidies for international students, and of higher education institutions' autonomy in the two countries to set their tuition fee levels, provided a strong incentive for international student recruitment.
- The introduction of student number controls for home students significantly limited the ability of higher education institutions to grow domestically. Their only option to expand their student numbers was to recruit international students. Student number controls were fully removed in Australia in 2012 and 2016 in the UK.



2.2 Impact of national education campaigns supported by government policies

- The government-led education promotion campaigns in Australia and the UK increased the visibility of their education sectors overseas. The two countries launched marketing campaigns under a national education brand and introduced international student recruitment targets.
- Streamlined student visa policies and post-study work opportunities backed the marketing campaigns and had a positive impact on international enrolments.

2.3 Impact of immigration policies on international enrolments

- The global financial crisis led to a continued economic downturn in the advanced economies. Migrant labour was perceived as contributing to growing unemployment, and a drive to reduce net migration became a big part of all recent general election campaigns in the UK. After decades of pro-internationalisation of education policy, policy changes that affected international student recruitment started to take place in Australia (2009) and in the UK (2010). Restrictions on vocational and further education colleges were followed by tighter student visa and immigration rules. For the first time in almost three decades, significant declines in the number of international students occurred in both countries.
- Time-series analysis of international study destinations (Australia, the UK and the US) shows a strong association between student immigration – including post-study work opportunities – and international enrolments. The US was the first country among the main English-speaking destination countries to illustrate a positive relationship between tighter immigration policies and a decline in international enrolments, following the events of 9/11.
- This research found a positive relationship between the presence of post-study work policies which allow students to gain temporary employment after graduation, and growth in the number of international students (based on evidence from Australia, the UK, US, Canada, New Zealand and Germany). Countries' student visa rules do not affect the global mobility of students. While the numbers of globally mobile students continued to grow over the past decades, immigration policies can divert student flows from one country to another.

2.4 The future of international engagement

- Inward-looking policies – such as protectionism and immigration control – affect international student demand in the short-term. The impact, however, is limited to the country in question and is unlikely to affect the long-run trajectory of international engagement.
- Greater international engagement and mobility are likely to shape the future. Many expect further growth in provider and program mobility and transnational education.
- The thought leaders interviewed for this study observe a shift from bilateral to multilateral international partnerships which are likely to be sustained. The future is about *"mutuality, not self-interest"* (Jane Knight, University of Ontario).
- It is likely that the mobility of education programs will become more important in the future. This will necessitate a wider access to international education programs delivered in partnerships between higher education institutions globally, through flexible delivery modes. Collaborative programs built on mutual interest and shared values are the ones to shape the future.

3. AIMS, OBJECTIVES AND METHODOLOGY

This section introduces the research aim and objectives, and details the methodology and structure of this study.

3.1 Aims and objectives

This research aims to establish whether political events and government policies, such as the regulatory environment for higher education, national support for international engagement and student visa policies in major study destinations, affect international education demand and engagement. The study also aims to draw on insights from international experts around the world, in an effort to foretell the future of international education on a global level.

3.2 Methodology

A review of higher education policies was undertaken to establish the relationship between changes in policies and international student enrolments.

A 30-year timeline of policy events was constructed for Australia and the UK.

This analysis was complemented by time-series data on international students in the UK and Australia to establish whether key policy changes might have affected international enrolments.

International student demand in major study destinations was measured through countries' national statistics on international enrolments. A comparative analysis of international student data across major English-speaking destinations was carried out to determine patterns in enrolment growth.

The limitation of this research is that it mainly evaluates the impact of government policies through publically available data on international enrolments in higher education. The impact of policies can be wider-reaching, and they may affect significant functions of education institutions such as research partnerships and their ability to attract scientists. Qualitative semi-structured interviews with international education experts and thought leaders were therefore undertaken to better understand wider impacts. The expert panel reflected on the future of global education engagement. Table 1 provides a methodological summary of how the research objectives were met.

Table 1: Summary of research objectives, methodological approach and data sources

Research objective	Methodology	Data sources
<p>Establish whether international students' demand to study at major destinations is affected by political events in host countries.</p> <p>Evaluate the impact of countries' immigration systems on international student numbers.</p>	<ul style="list-style-type: none"> • Review of higher education policies. • Review existing information and statistical resources and establish data comparability. • Identify proxies for the wider impact of government policies on international education, such as impact on the economy and the academic contributions of students. • Time-series data analysis of international student enrolments. • Early indication of changes in demand, such as survey and application data. • The data analysis primarily focused on Australia, the UK and the US. Some wider comparisons were drawn to include Canada, New Zealand, Netherlands and Germany. The country choice was determined by the IEAA/IDP Working Group. 	<ul style="list-style-type: none"> • Departments of education policies • Student data statistical resources: Institute for International Education (IIE), Higher Education Statistics Agency (HESA), Department for Education and Training (DET), UNESCO Institute for Statistics; OECD Education Indicators • National statistics: Australian Bureau of Statistics (ABS), Office for National Statistics (ONS), World Bank Development Indicators; IMF World Outlook) • UCAS; IIE Survey
<p>Explore whether political events affect wider international education engagement such as institutional collaboration.</p>	<ul style="list-style-type: none"> • Qualitative semi-structured interviews with 30 members of an expert panel from 15 countries worldwide. 	<ul style="list-style-type: none"> • Primary data collection. Countries included: Australia, Canada, the Netherlands, Ireland, Germany, the UK, the US, Japan, New Zealand, Malaysia, Colombia, Botswana, the Czech Republic, Fiji and the Philippines.
<p>The future shape of international mobility and education engagement</p>	<ul style="list-style-type: none"> • Qualitative semi-structured interviews with 30 members of an expert panel from 15 countries. 	<ul style="list-style-type: none"> • Primary data collection

4. INTERNATIONAL STUDENT FLOWS AND GOVERNMENT POLICIES: COMPARATIVE EVIDENCE

This section provides a historical perspective on the interplay of government policies and growth in international student enrolments. Education establishments in countries where international students pay differential tuition fees, compared to local students, have often been criticised for being commercial in their approach towards international student recruitment. The history of differential tuition fees, however, shines a light on a series of government policies in the UK and Australia that have encouraged higher education institutions to pursue the recruitment of international students.

4.1 Historical drivers for international student recruitment: comparative evidence from Australia and the UK

There are many parallels between the higher education policies in Australia and the UK. Disinvestment in higher education manifested in discontinued funding for international students in the 1980s in Australia and the UK, and led to the introduction of tuition fees.

When tuition fees were first introduced by the Thatcher government in the UK in 1981, some British universities refused to charge the fees in fear that the higher fee levels would deter international students³.

The introduction of differential fees for overseas students also contributed to backlashes internationally. Malaysia was the country sending the largest number of international students to the UK at that time, and the increase in tuition fees was one of the reasons that led to the “Buy British Last” policy of then Prime Minister Mahathir Mohamad⁴.

Both Australia and the UK continued their flagship scholarship programs, such as the original Colombo Plan in Australia and Chevening in the UK. The Overseas Development Administration in the UK continued to fund international students until the early 1990s.

Differential tuition fees for international students in Australia were introduced in 1986. At that time, there were three main categories of international students:

- i. scholars funded by the Australian government
- ii. partially funded students
- iii. privately funded students.

The shift from “aid to trade” in the treatment of international students meant governments in both countries were spending less on universities⁵.

Partially funded students in Australia were gradually phased out in the early 1990s, while the recruitment of self-funded students continued to expand.

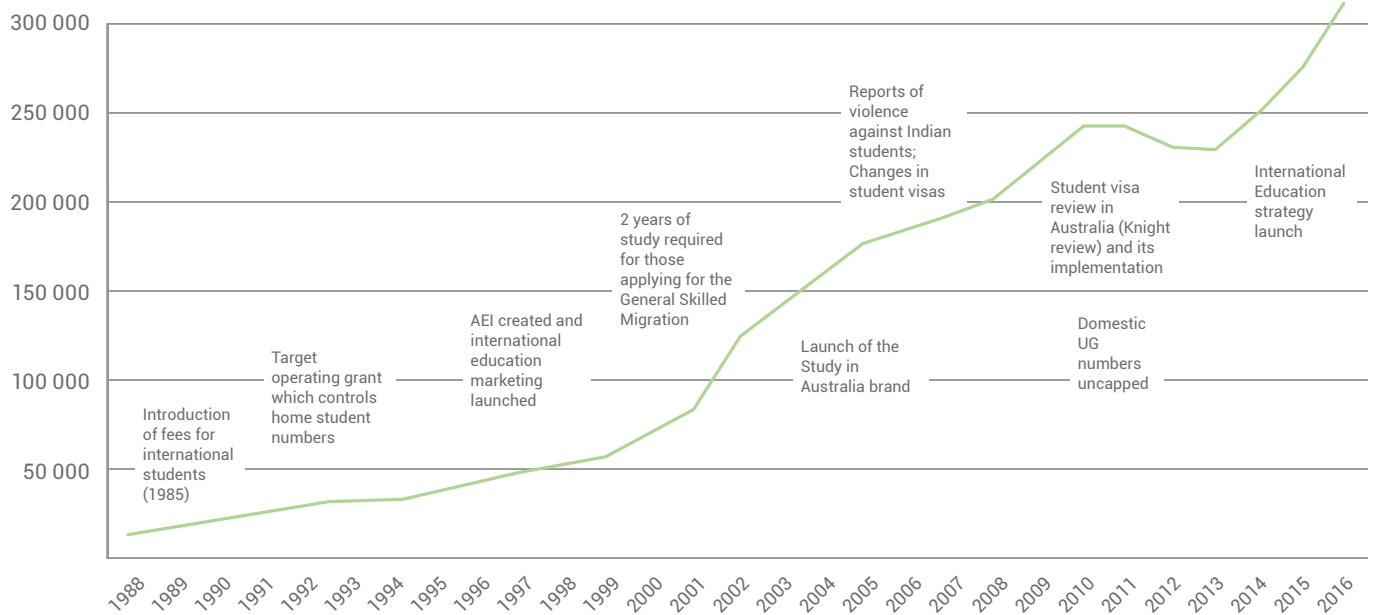
³ Perraton, H. (2014), *A History of Foreign Students in Britain*, Palgrave Macmillan.

⁴ Ibid. and <https://searchinginhistory.blogspot.co.uk/2014/01/buy-british-last-policy-of-mahathir.html>.

⁵ Ziguras, C. and G. McBurnie (2015, p.30), *Governing Cross-Border Education*, Routledge.



Figure 1: Timeline of higher education policies and student mobility to Australia (1988–2016)



SOURCES:

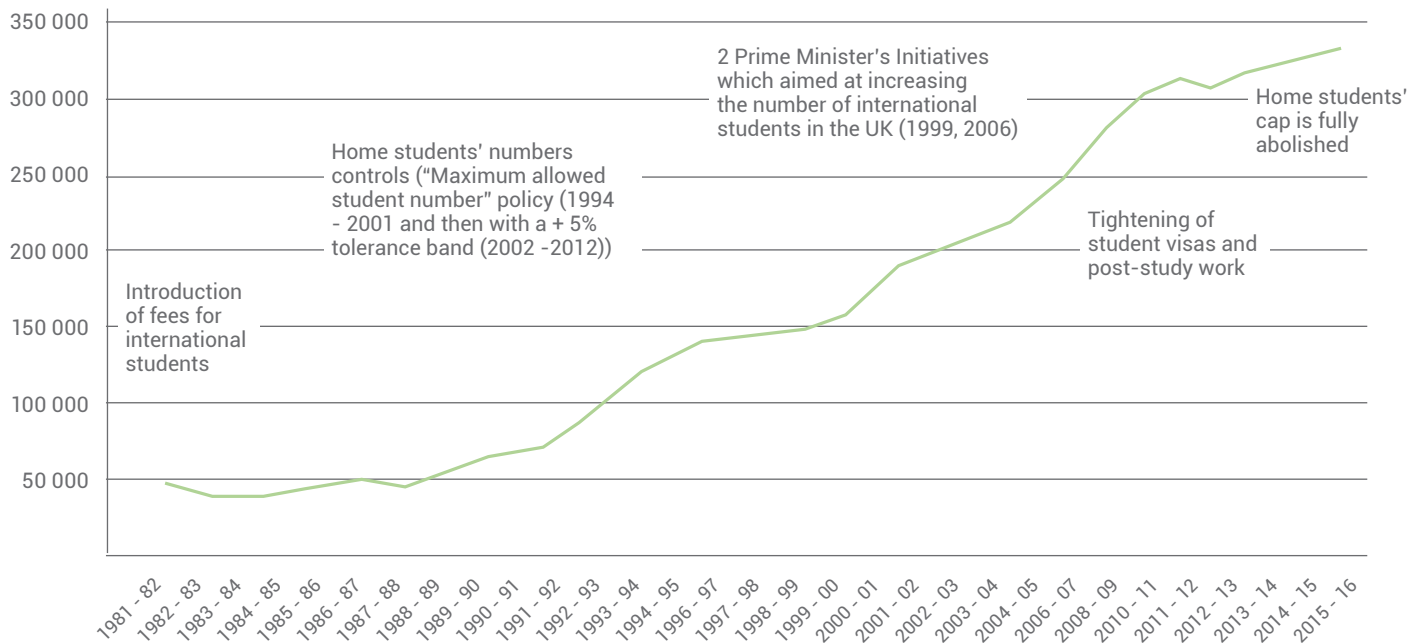
1. Norton, A. (2014), Mapping Australian Higher Education, Grattan Institute Report No. 2014-11, October 2014; <https://grattan.edu.au/wp-content/uploads/2014/10/816-mapping-higher-education-20142.pdf>.
2. Norton, A. (2014), Unleashing Student Demand by Ending Number Controls in Australia? An Incomplete Experiment; HEPI report 68; Higher Education Policy Institute; <http://www.hepi.ac.uk/wp-content/uploads/2014/08/NORTON-As-uploaded.pdf>.
3. Norton, A. and I. Cherastidtham (2015), University Fees: What Students Pay in Deregulated Markets, Grattan Institute Background Paper; <https://grattan.edu.au/wp-content/uploads/2015/08/830-University-Fees.pdf>.
4. Department of Education and Training (2015), Higher Education in Australia: A Review of Reviews from Dawkins to Today; https://docs.education.gov.au/system/files/doc/other/higher_education_in_australia_-_a_review_of_reviews.pdf.
5. Australian Government (2011), Strategic Review of the Student Visa Programme 2011; <https://www.border.gov.au/ReportsandPublications/Documents/reviews-and-inquiries/2011-knight-review.pdf>.
6. Spinks, H. (2016), Overseas students: Immigration Policy Changes 1997–2015; http://www.aph.gov.au/About_Parliament/Parliamentary_Departments/Parliamentary_Library/pubs/rp/rp1516/OverseasStudents.

Figures 1 and 2 map key higher education policy shifts against international student enrolments in the UK and Australia. The main policy changes that appear to have affected international students directly through the introduction of tuition fees – and indirectly through a change in the rules for the providers of higher education– include:

- A discontinuation of subsidies for international students and the introduction of tuition fees for international students took place in Australia (1985) and the UK (1981).
- The continuous increase in domestic participation rates in higher education and an expansion of the higher education institutions (HEIs) led to the introduction of student number controls on home student recruitment in the two countries. This policy limited growth in domestic student numbers for HEIs. Those seeking to expand their student numbers could only do so by recruiting privately funded students (i.e. international students).
- A combination of the policies above and the autonomy of the sector to set tuition fee levels for privately funded students incentivised HEIs to pursue international student recruitment. An additional advantage of international student recruitment was the discretionary spending HEIs enjoyed, unlike the income from publicly funded students which was monitored.

- Recruitment of international students brought economic benefits and soft power to the host country. Government-led education marketing campaigns in the late 1990s and through 2000 were at the forefront of international student recruitment. Student visa systems were streamlined, and international students were allowed to work during and after their studies.
- In the UK, two consecutive Prime Ministers' Initiatives were launched, and both had international student targets (in 1999 and 2006).
- Australia launched the "Study Australia" brand, and activities were led by a newly created government unit, Australian Education International.
- For almost 30 years, government policies actively supported and incentivised international recruitment into Australia and the UK.
- Initially, the closure of (mostly private post-secondary) colleges in Australia and the UK resulted in severe declines in international students at vocational and further education colleges and English language schools. Radical changes to visa policies introduced in Australia (in 2009), and shortly afterwards in the UK (2012), led to the first recorded declines of international students in the two countries after decades of continuous growth.

Figure 2: Timeline of higher education policies and student mobility to England (1981–2016)



SOURCES:

1. Economics of Higher Education (2013), History of Student Number Controls; <https://economicsofhe.org/2013/12/06/history-of-student-number-controls/>.
2. British Council and Department for Innovation, Universities and Skills policy documents; <http://webarchive.nationalarchives.gov.uk/+http://www.dius.gov.uk/international/pmi/index.html>
3. Times Higher Education (2013), Thatcher Had "Immense Impact" on Higher Education(article by Jack Grove); <https://www.timeshighereducation.com/news/thatcher-had-immense-impact-on-higher-education/2003059.article>.
4. Prime Minister Initiatives (PMI): <http://webarchive.nationalarchives.gov.uk/+http://www.dius.gov.uk/international/pmi/index.html>.

- In Australia, the Knight Review revisited the student visa policy and put forward 41 recommendations. The government accepted the recommendations in 2012.
- Student number controls on domestic students were abolished in Australia in 2012 with the introduction of a "demand-driven system". The UK fully abolished student number controls in 2016.

The timelines above show many similarities in higher education policies in Australia and the UK. In addition to these policies, there were other factors at play in the domestic and global environment that affected international demand in the two countries. The list below identifies key drivers of change in the domestic environment and external events that might have had an impact on international mobility:

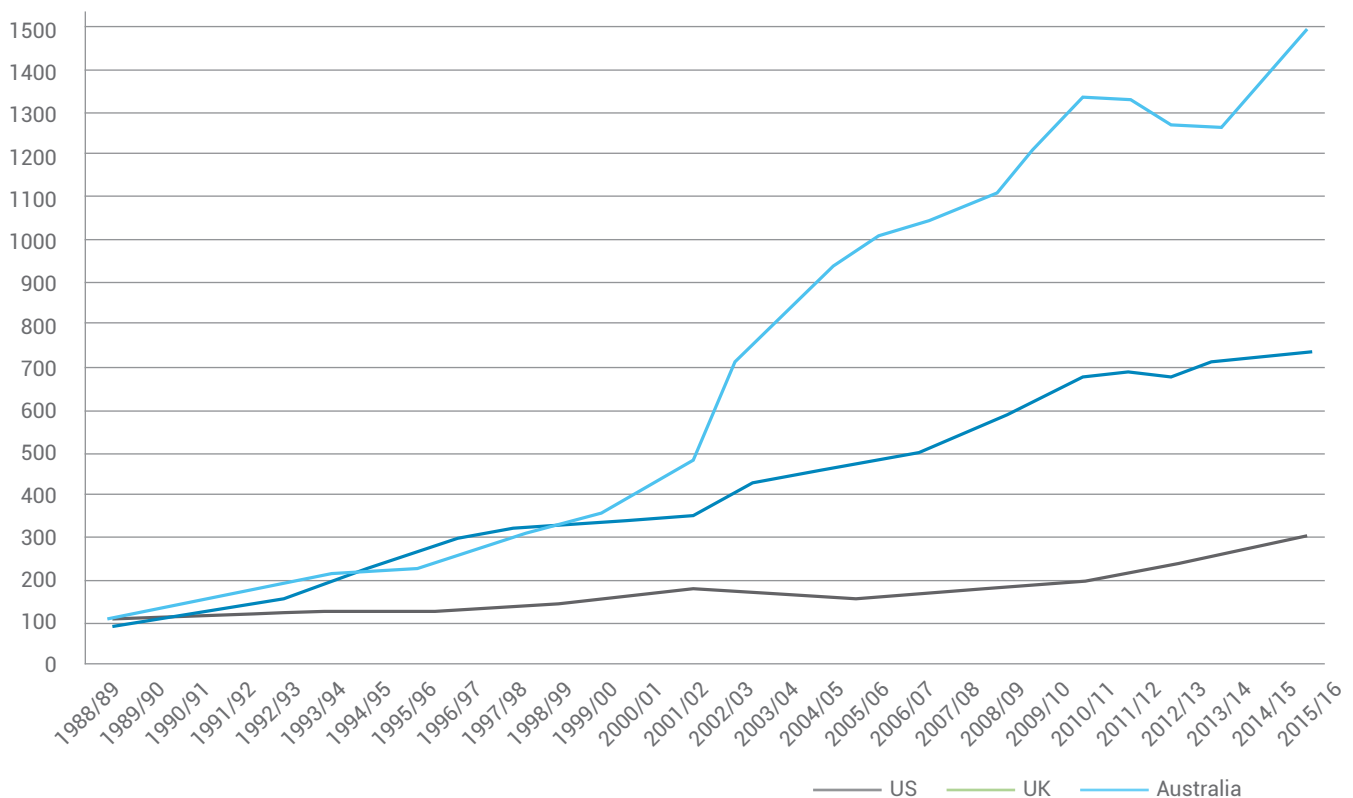
- The role of IDP in Australia in student marketing, and the British Council in the UK through the Education Counselling Service in the 1990s and education promotion, supported institutions in their recruitment efforts overseas.
- Australia and the UK mainly recruited students from South-East Asia in the 1980s and early 1990s (Hong Kong, Malaysia, Singapore and Indonesia). The Asian currency crisis in 1997-98 affected enrolments to the two countries in the late 1990s and early 2000s.

- Continued economic growth in China led to a surge in demand from China to major study destinations (UK, Australia and the US) in the early 2000s, followed by a rise in demand from India.
- Tightened visa policies in the US following the 9/11 attacks might have diverted prospective students from the US to the UK, Australia, neighbouring Canada and other countries.
- The global financial crisis of 2007-08 affected the wealth of many countries in Europe and North America. The economic downturn led to low-cost overseas workers being blamed for the rising unemployment. The UK general election of 2010 was partly won on the back of a promise to reduce the net migration numbers. International students were included in the net migration targets. While the overall number of international students in the UK declined significantly, their inclusion in net migration statistics remains one of the reasons net migration in the UK has not fallen to "*the tens of thousands*"⁶ as pledged in recent Conservative Party manifestos.

Appendix A provides a detailed timeline of higher education policy changes and major external events in Australia and the UK which have impacted on international student enrolments.

⁶ For more on the "tens of thousands" manifesto pledge, see: <http://www.bbc.co.uk/news/uk-politics-39840503> and <https://www.theguardian.com/politics/2017/may/08/conservatives-to-keep-tens-of-thousands-immigration-pledge>.

Figure 3: Indexed growth in international students to Australia, UK and the US (1988 = 100)



SOURCE: Analysis of Department of Education data (Australia), HESA student record (UK) and the Institute for International Education, Open Doors Data (USA).

4.2 Policy responses to 9/11 and the global financial crisis and their impact on student demand

This section widens the comparative analysis to include the US as a major study destination. Growth in international student enrolments in the three countries is analysed, which aims to establish whether there is a pattern in the three countries' growth dynamics. While Australia captures international student numbers accurately across all education sectors, comparable data from other countries' statistics are limited to the higher education sector only. All international comparisons in this study, unless specified otherwise, refer to higher education.

Figure 3 compares the growth in international student numbers since 1988, the earliest year for which Australian international student data are available. Compared with the UK and the US, Australia experienced the fastest growth over the period. There was an acceleration in student numbers growth in the early 2000s, coinciding with the tightened immigration policy in the US following 9/11 attacks, suggesting that students who would have traditionally travelled to the US for their education might have opted for Australia instead. Similarly, steady growth was experienced in the UK, which suggests that a diversion of student flows from the US to the UK also occurred.

To better understand annual variations in countries' student enrolment growth rates, Figure 4 compares year-on-year growth rates in Australia, the UK and the US. The chart shows the world's annual international student mobility growth for further context.

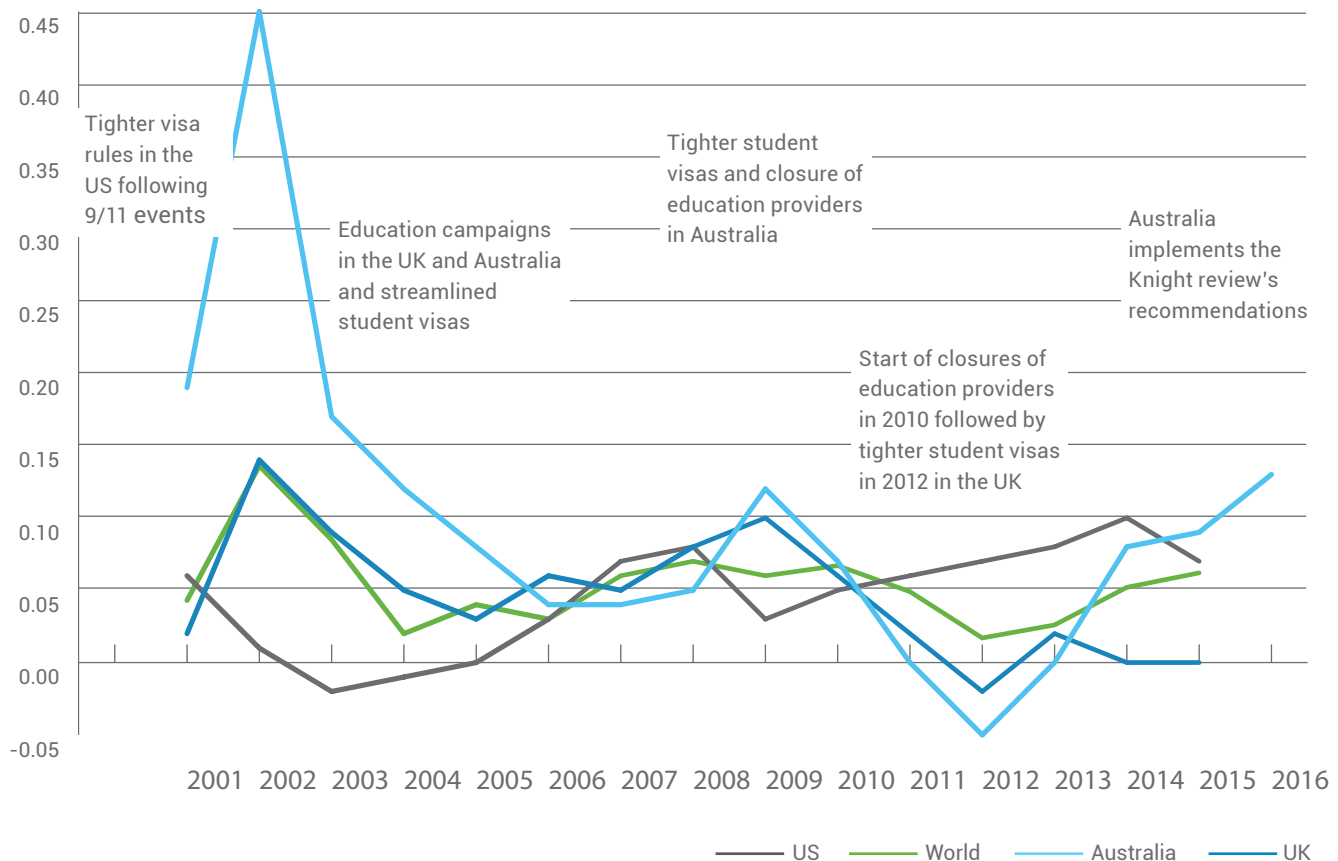
The following events appear to have shaped the flows of international students since 2000:

- 9/11 events.
- The global financial crisis.
- Student visa policies post-2012.

“ The market is fluid, so a negative impact in one country leads to a positive impact in another country, rather than a shrinking market. ”

Kent Anderson

Figure 4: Annual growth in international enrolments in Australia, the UK and the US (2000–2016)



SOURCE: Analysis of UNESCO Institute for Statistics data; <http://data.uis.unesco.org/>. (Data accessed 27 August 2017.)

4.2.1 9/11 events

The selected countries appear to have never experienced significant growth at the same time. Growth in the UK and Australia in early 2000 is likely offset by declines in the US in the aftermath of 9/11. Some growth returned to the US in 2006. Enrolment growth rates were in the range 4–7 per cent in the studied countries in 2007. Annual growth slowed down in the US during the global financial crisis mainly because enrolments of Indian students remained flat.

4.2.2 The global financial crisis

Rising unemployment in the aftermath of the global financial crisis was broadly blamed on migrant labour. Policy responses to public discontent shifted the focus to protectionist policies, including trade protectionism and the introduction of tighter immigration rules. The effects of private college closures, combined with tighter student visa and immigration policies, were felt in Australia from 2009. The UK followed suit, initially with closures of private colleges, followed by education providers losing their ability to recruit international students from 2010; tighter student visa rules followed in 2012. Student enrolments declined in 2012, and growth in the UK has remained flat to the present day. In contrast, there was a steady growth in enrolments in the US throughout this period.

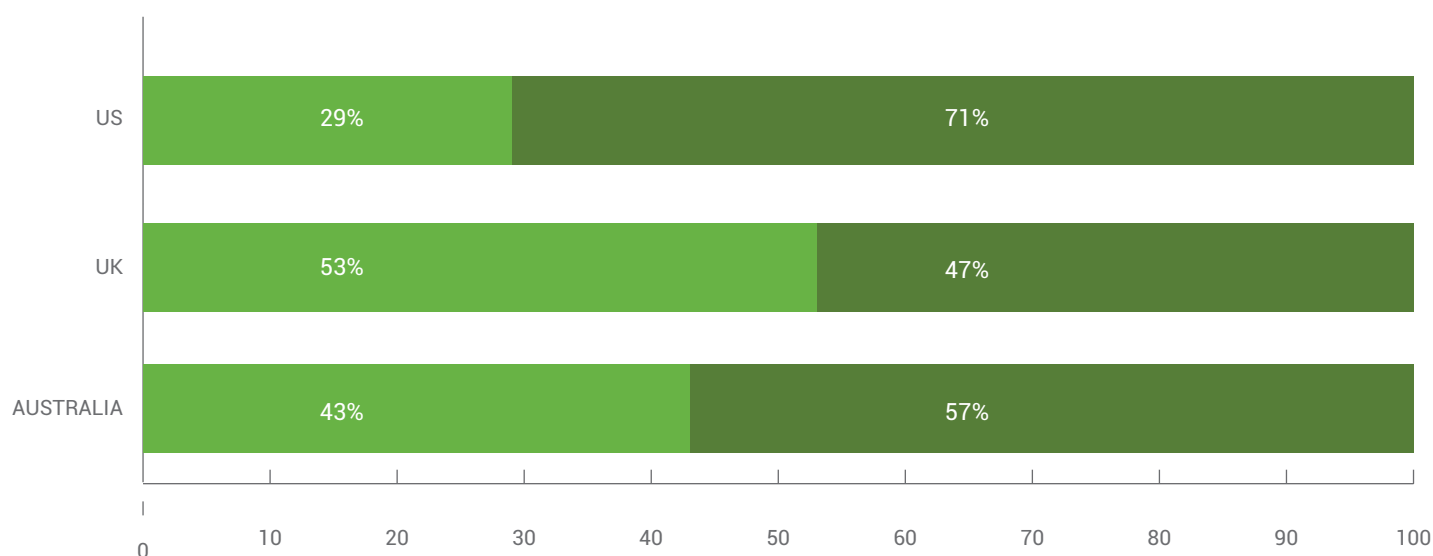
4.2.3 Student visa policies post-2012

The recommendations of the Knight Review were fully implemented in 2012. Student numbers to Australia declined between 2011 and 2013. However, they bounced back in 2014 and returned to double-digit growth in 2015. The introduction of the new simplified student visa framework and post-study work visa in July 2016 is likely to continue to incentivise international student demand in the country⁷.

Overall, *established* host countries are better at reporting their onshore student numbers than *emerging* study destinations. While student visa and immigration policies directly affect international enrolments in the host country, they do not appear to have an impact on overall global student mobility. Figure 4 shows that while countries' immigration policies may have very little, if any, effect on the overall number of globally mobile students, they mainly affect the direction of travel of students. That is, the healthy growth in international student numbers in countries with more liberal student visa policies appears to be at the expense of countries with tighter immigration rules.

⁷ For further details see: <https://www.studyinaustralia.gov.au/news/simplified-student-visa-changes-from-july-1>.

Figure 5: Proportion of international commencements in overall student enrolments



SOURCE: Analysis of Department of Education data (Australia), HESA student record (UK) and the Institute for International Education, Open Doors Data (US).

Table 2: A snapshot of student visa policies, post-study work and demand for higher education – international comparisons

Description	Australia	Canada	Germany	New Zealand	UK	US
Work allowed during study per week	Up to 20 hours	Up to 20 hours	Up to 20 hours	Up to 20 hours	Up to 20 hours for degree programs	Up to 20 hours (on campus only)
Post-study work	2–4 years.	Up to 3 years	12 months	12 months	Limited	12 months OPT and 36 months for STEM students (OPT)
International student recruitment targets	720,000 international students by 2025	450,000 international students by 2022	350,000 international students by 2020	143,000 international students by 2025	No	No
Growth rate over the past 2 years	17.8%	25%	16.3%	38.1%	0.2%	15.7%

NOTE: Table adapted from World Education Service and British Council (2017), 10 Trends: Transformative Changes in Higher Education; <https://ei.britishcouncil.org/educationintelligence/10-trends-transformative-changes-higher-education?platform=hootsuite>.

DATA SOURCE: UNESCO Institute for Statistics: http://data.uis.unesco.org/Index.aspx?DataSetCode=EDULIT_DS. (data extracted on 27 August 2017.)

METHODOLOGICAL NOTE: UNESCO Institute for Statistics (UIS) data are used for this analysis which covers 2013–2015 for Australia, Germany, New Zealand and the US; 2012–2014 for the UK and 2011–2013 for Canada.

4.3 Lag effects of policy impact

Immigration policies' lag effects depend on the proportion of new commencements in the education system. The higher the ratio of new enrolments that would have been affected by the new immigration rules, the shorter the lag effect between policy change and student enrolments.

Figure 5 shows that more than half of the international students in the UK are commencements (53%). This means the UK must attract more than half of its international student body each year to maintain its current student numbers. It also means that a policy change which affects the country's ability to recruit new international students would have an immediate impact. The US has the lowest proportion of new entrants (29%), which, compared to the UK and Australia indicates a longer lag effect.

4.4 Effects of countries' immigration policies and post-study work opportunities on international mobility of students

A recent study by the British Council (2017)⁸ shows a rise in the role of national governments in shaping their countries' international education involvement. The study collected qualitative information against 37 criteria and covered 38 countries and geographies. It found that many national governments across the studied countries are preoccupied with student mobility.

Previous research found that international students, especially postgraduates, are career-oriented and seek to optimise their employability, which is a key motivation to study abroad⁹. Table 2 plots together information on countries which allow international students to work during and after graduation, and have set international student recruitment targets against the growth rate in enrolments over the past two years. The table suggests a positive relationship between post-study work options, international recruitment targets and high enrolment growth in international students.

A significant shift in the geopolitical landscape is observed in the rise of China across some of the major university league tables such as the ARWU (Academic Ranking of the World Universities)¹⁰ and the Times Higher Education World University Ranking. In addition to heightened investment in education, projects like 211¹¹ and 985¹² have contributed to a concentration of funds in a smaller number of universities. The visibility of China's higher education system is further heightened by the government's ambition to attract 500,000 international students to China by 2020, a significant increase on the previously announced target of 300,000 in the same period¹³.

Implications

Analysis of higher education policies in Australia and the UK shows a strong government push in both countries between the 1980s and 2009 towards international student recruitment. While many factors in the internal and external environment are at play, the following policies are likely to have had the greatest impact on international student recruitment:

- Removal of funding for international students and push towards the introduction of full tuition fees. While this policy was not acted on straight away, combined with the HEIs' autonomy in the two countries to set their tuition fee levels, it provided a strong incentive for international student recruitment.
- The introduction of student number controls significantly limited the ability of HEIs to grow domestically. Their only option to grow was to recruit international students. Student number controls were fully removed in Australia in 2012 and 2016 in the UK.
- The government-led education promotion campaigns in Australia and the UK gave HEIs a significant visibility overseas. The two countries launched marketing campaigns under a national education brand and introduced international student recruitment targets. Streamlined student visa policies and post-study work opportunities backed the marketing campaigns and had an impact on international enrolments. After decades of policy in favour of internationalisation of education, a change in policy took place in Australia in 2009 and 2010 in the UK. The two countries soon experienced the first significant declines in their student numbers.

Following the Knight Review of the student visa in Australia in 2012, the student visa rules were relaxed, and the post-study work route was reopened. It took over two years for enrolments to bounce back.

International enrolments in the UK dipped in 2012 and growth has remained flat. The UK has the lowest growth rate compared to the other English-speaking destinations countries of Australia, the US, Canada and New Zealand. Countries with international recruitment targets and post-study work opportunities are enjoying the highest growth across the comparator peer group.

International comparisons show that countries' visa settings have an impact on international enrolments. While the number of globally mobile students continues to grow, student visa policies can divert student flows from one country to another.

⁸ Ilieva, J., Tsiligiris, V., Killingley, P. and M. Peak (2017), *The Shape of Global Higher Education* (Vol. 2): International Mobility of Students, Research and Education Provision.

⁹ British Council, *Student Insight Data and Other Agencies' Industry Research*.

¹⁰ Calderon, A. (2017), *What 15 Years of Global Ranking Says about HE Trends*; <http://www.universityworldnews.com/article.php?story=2017082915474677>.

¹¹ Project 211 was launched in 1995 by the Chinese Ministry of Education, with the aim of enhancing research standards and excellence at Chinese Universities. At present, 118 universities are designated as Project 211 universities and meet the threshold criteria. For further details see: <http://www.cucas.edu.cn/studyingchina/level>.

¹² Project 985 provides a concentration of research funds to a smaller group of higher education institutions in an attempt to build world class universities. There are 39 universities funded by national and local governments, up from 9 HEIs initially. For further details see: <http://www.cucas.edu.cn/studyingchina/level>.

¹³ PIE News (2017), *China: New Rules for International Students Include Customs and Language Classes*; <https://thepienews.com/news/china-new-rules-for-intl-students-include-customs-and-language-classes/>.

“ The global landscape for HE has changed noticeably over the last decade with international engagement becoming more embedded in national HE systems. I expect that this will continue to the future. Within this context, it will be incumbent on national systems to actively support international engagement. ”

Michael Peak, British Council

5. EARLY INDICATIONS OF POLICY IMPACT: BREXIT AND TRUMP

This section outlines some of the early data on shifts in demand in response to Brexit and President Trump's travel ban.

The impact of the Brexit referendum vote, given its regional dimension and the future relationship of the UK with the rest of the European Union, is expected to affect mainly EU applicants. Given lag effects of at least one year, the impact will be captured through the enrolment data for the academic year 2017–18, which will be available through HESA's first statistical release in January 2019.

The earliest indication of the impact of the election of President Trump in the US and the travel ban he introduced became available in November 2017, when IIE released the 2017–18 international enrolment data as part of its *Open Doors* report¹⁴. The number of international students to the US increased by three per cent overall. However, for the first time in 12 years, the number of new fall enrolments in US institutions declined by 10,000 to approximately 291,000. Further, the accompanying Fall International Student Enrolment Survey 2017 suggests enrolments overall continue to decline, with data from institutions indicating an average seven per cent drop in demand.

5.1 Policy impact of the referendum vote in the UK on student demand

Currently, an indication of the impact of the referendum vote on EU students' applications to UK HEIs is available through the UCAS statistical release (June 2017).

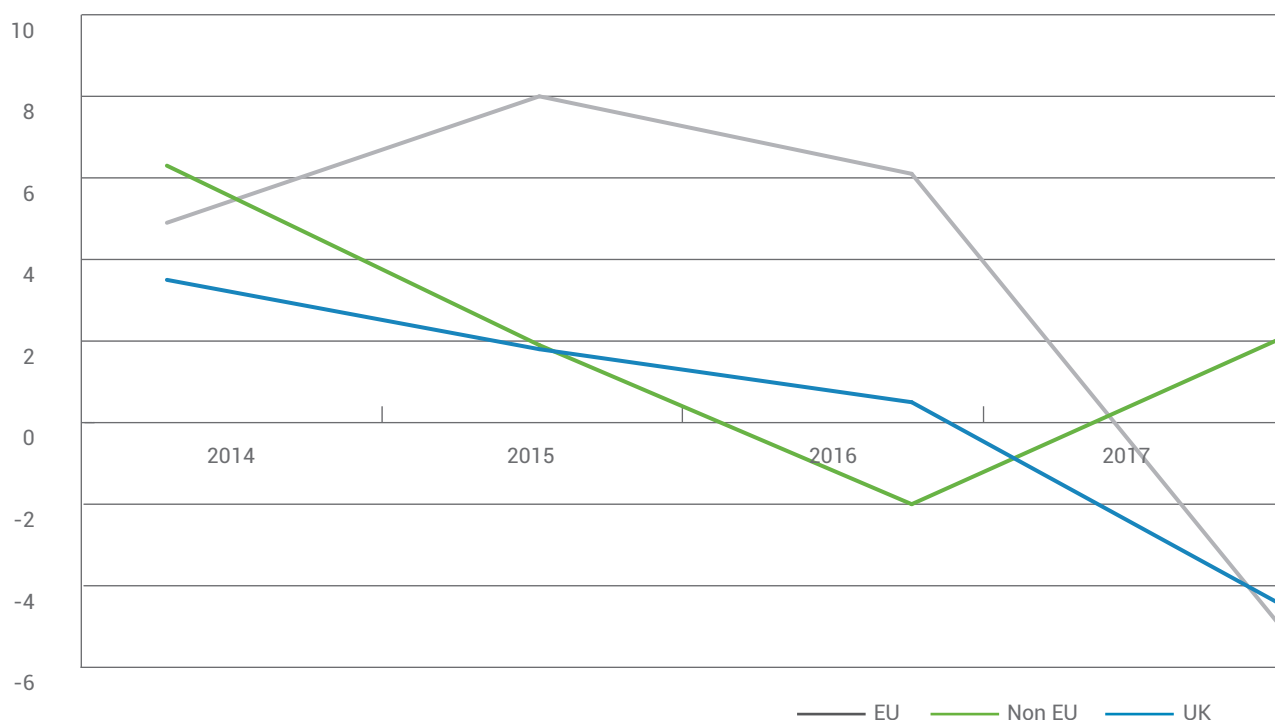
Figure 6 shows a 5 per cent decline in universities applications from EU students. Changes to student funding and support, mainly in healthcare subjects, combined with a reduction in the 18-year old population, resulted in reductions in the numbers of UK applications. The recovery in non-EU applicants looks promising, and it also indicates that these student groups do not appear affected by Brexit.

5.2 Student enrolments: early indicators of the impact of US travel ban

There are already strong signals about the impact of the travel ban which was installed by President Trump's administration on international mobility to the US. The ban affects six mainly Muslim countries: Iran, Libya, Somalia, Sudan, Syria and Yemen. The IIE Survey of College Admissions carried out in the summer of 2017 found a decelerated growth in admissions.

¹⁴ Open Doors 2017, IIE, November 2017 <https://www.iie.org/Why-IIE/Announcements/2017-11-13-Open-Doors-Data>

Figure 6: UK undergraduate applicants by domicile (30 June application deadline)



SOURCE: UCAS analysis (2017), Applicants by Domicile by 30 June Application Deadline; <https://wwwucas.com/file/115906/>.

However, it is in line with the trend in domestic enrolments¹⁵. There were variations across the different states, with the most significant reductions in Texas.

IIE alongside other nine education associations carried out a separate survey with almost 500 institutions on their new enrolments figures over the period September – October 2017. The surveyed higher education institutions reported an average decline of 7 per cent in their new enrolments which were concentrated in 45 per cent of the universities and colleges.

Students from Iran, the eleventh leading place of origin, increased by 3 percent to 12,643, still significantly lower than the peak of more than 50,000 Iranian students in the United States in 1979/80. From 1974/75 to 1982/83, Iran was the top sender of international students to the United States (Open Doors 2017, IIE).

Additionally, the Graduate Management Admission Council's 2017 application survey shows that 32 per cent of the US graduate business programs reported increases in their international applicants. This compares with growth in 77 per cent of the programs in Canada, 67 per cent of those in Europe and 65 per cent of those in the UK. The Council of Graduate Schools' survey shows that 40 per cent of the graduate schools in the US experienced declines in their international applications in 2017–18¹⁶. The survey covers 965 graduate management programs, which are taught in 351 business schools and faculties worldwide.

5.3 Other early signs of shifts in student demand

An online survey by IDP Education and course searches registered by the Hotcourses' database provide further evidence about shifts in international student demand.

The IDP Education's annual Student Buyer Behaviour research¹⁷ explores shifts in perception among international students in relation to the five main English-speaking study destinations and compares them to perceptions in previous years. In 2017, over 4,200 international students who used IDP services responded to the research that looks at a range of student mobility drivers including safety, affordability, graduate employment opportunities, student visa policies and quality of education. While the US and the UK continue to dominate perceptions as destinations for high quality of education, Canada emerges as a clear winner across the rest of the above mentioned measures. The country's welcoming policies and post-study work opportunities for students – as well as a safe and affordable environment – helped to increase its attractiveness as a study destination.

In 2017, the survey shows a clear shift in perceptions away from the US and very little or no change for the UK, Australia and New Zealand. The US has lost ground on several measures such as safety, affordability, visa requirements and graduate employment opportunities.

¹⁵ See <https://www.iie.org/Why-IIE/Announcements/2017-07-06-IIE-Survey-of-College-Admissions-International-Students-Fall-2017>.

¹⁶ Graduate Management Admission Council (2017), 2017 Application Trends Survey Report; <https://www.gmac.com/market-intelligence-and-research/research-library/admissions-and-application-trends/2017-application-trends-survey-report.aspx>.

¹⁷ IDP Education Research 2017, <https://www.idp.com/global/news/2017/10/11/2017-international-student-buyer-behaviour-research>

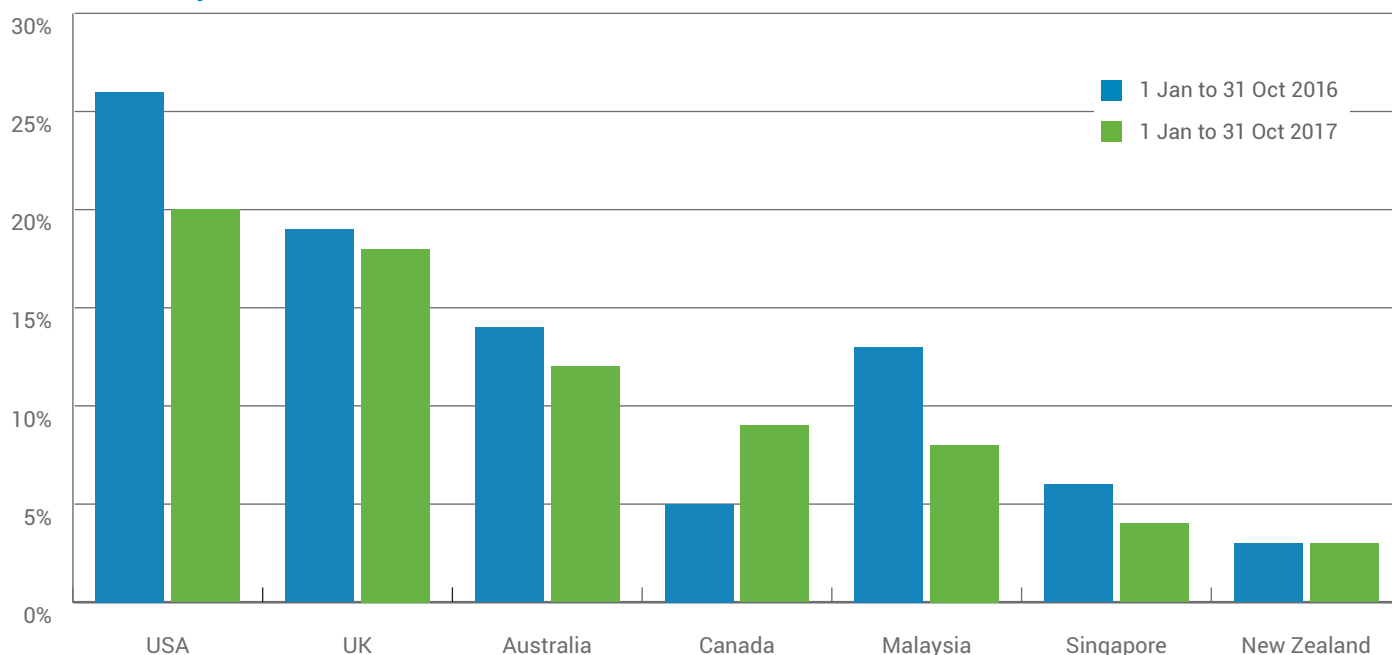
Figure 7: IDP student perceptions 2017
IDP student perceptions of each destination on the following attributes:



SOURCE: IDP Education Student Buyer Behaviour Research 2017, <https://www.idp.com/global/news/2017/10/11/2017-international-student-buyer-behaviour-research>

Note: The IDP Education research was conducted via an online survey in July 2017. More than 4,200 students who had used IDP's services completed the survey. In the online survey, IDP students rated their perceptions of each destination with the different drivers of choice, on a scale of 0 (worst) to 10 (best). Results are based on mean scores. Students were asked to only rate destinations with which they were familiar.

Figure 8: Key shifts in global searches via Hotcourses international study websites for the top 7 most searched study destinations



SOURCE: Hotcourses Insights Tool.

Hotcourses web-based course and institution search for international students provides insights into real-time shifts into prospective student behaviours. Using data on over 13 million prospective student users to its international websites in 2017, the data echoes IDP's student survey findings and shows Canada as a study destination which is enjoying a growing popularity at the expense of the US. The global share of searches for the US dropped from more than 25 per cent percent during January to October 2016 to 20 per cent for the same period in 2017, while Canada's increased from five per cent to nearly 10 per cent.

In summary, concrete evidence about the impact of the recent political realities in the UK and US will be available in late 2018 and early 2019. There are early indications of a worrying pattern of declining interest in studying in the US. The impact of the referendum vote in the UK mainly affects EU students. Application data for the 2017-18 recruitment cycle shows 5 per cent dip in EU applications compared to last year. Furthermore, there is a potential threat to the academic profession in the UK if EU academics decide to leave the country.

6. POLICY MATTERS: VIEWS FROM ACROSS THE WORLD

This research sought views from over 30 international education professionals and thought leaders. They were asked to comment on how they perceive political influences to impact international engagement relating to:

- Student mobility
- International partnerships in collaborative teaching and research
- Broader international engagement.

6.1 Emerging themes by country

Study destinations other than the UK and the US, such as Canada, Ireland, Germany and Netherlands, appear to have their international education community fairly protected from inward-looking policies.

Many interviewees cited the growing importance of engagement with China, whose influence in international education is set to expand.

6.1.1 Where international engagement in education may be most affected by government transitions

There was an agreement among interviewees that student visa and immigration policies, while presenting serious challenges to mobility, are unlikely to affect the longer-term trajectory of international engagement. However, they may limit the host country's ability to benefit fully from the global engagement if the domestic policy is perceived to be more protectionist than other countries.

Republic of Ireland

"The markets will be fine", said Douglas Proctor (University College Dublin), about the impact of inward-looking government policies. "Political changes do not close markets, but they can bruise them. However, the markets will bounce back. With a growing middle-class, the demand for higher education continues to grow. The market focus should be on the hearts and minds of students [and their parents] rather than on the immediate influence of government policy". It is worth pointing out that Ireland was perceived to be fairly protected from populist policies. "Ireland is a small and open country." (John McNamara, McNamara Economic Research). "Smaller countries are less prone to political swings. Things happen very slowly. The International Education Strategy from 2011 did not treat education as an export but as means to attract skills. This philosophy still resonates, and recent changes in the student visa policies led to opening post-study work for up to two years for international graduates. There is a sense of long-term vision which is focused on talent acquisition, skills and productivity vs cash reasons."

The referendum vote in the UK is perceived in Ireland as offering challenges and opportunities: *"Brexit is viewed as an unprecedented challenge to the State and has enormous economic and political consequences for Ireland, the only EU country with a land border with the UK."*

The international education sector in Ireland already sees the impact of Brexit. Uncertainty about the future for international students in the UK (regarding Brexit, shifting visa regulations and security) has led to a sharp increase in the number of EU and international applications to Irish HEIs¹⁸. (Gill Roe, Director, Southern Cross Consulting).

Canada

Canada is another "safe" country where *"anti-immigration policy will not win the popular vote"* (Alex Usher, HESA). The country's province-level autonomy over immigration policies means that if only one province is leaning towards nationalistic sentiments, other provinces are unlikely to be affected. Usher referred to Canada as *"the incidental beneficiary of others' misfortunes"* regarding immigration controls in the US in early 2000 and the current impact of President Trump's policies. A few interviewees from other countries referred to the willingness of Canadian universities to "help" students who are affected by the travel ban covering six mainly Muslim countries by recognising their previous learning in the US and allowing them to finish their degrees in Canada.

Germany

Germany also appears exempt at present from the impact of immigration policies on international students. International students do not pay tuition fees in the country, though some little changes in their fee-paying status are on the way. Ulrich Grothus from the German Academic Exchange Service commented in August 2017 on the forthcoming general election in the country and its potential impact: *"Germany is preparing for the next general election in September 2017. However, internationalisation is not a controversial subject in the campaign. The most important differences between the major parties in education policy refer to the role of the federal government in the funding of education as opposed to the several states, which have the prime responsibility for education according to the Constitution."* The German Academic Exchange Service (DAAD) is the main funder for internationalisation at the federal level, and its *"budget has gone up 27 per cent from 2013 to 2017. It is now €550 million. Some, but by far not all of the additional funding (approximately €30 million) is for the integration of refugees into the higher education system."* According to Ulrich Grothus, *"all major parties at the federal level put a strong emphasis on education, research and globalization. The field where all these overlap, the internationalisation of higher education, thus enjoys a strong priority. This applies to incoming international students, international experience for domestic students, research cooperation and transnational education, where Germany prefers a cooperative approach"*.

¹⁸ See, for example, Hotcourses' latest Brexit Report, *How Has Global Demand for Higher Education Shifted Over the Last 12 Months?*, which shows increasing searches for Ireland amongst prospective students and a drop in UK searches. (Hotcourses Insights, June 2017; <https://21tqmu3jseyp1msxha2oh5wz-wpengine.netdna-ssl.com/wp-content/uploads/2017/07/Brexit-report-June-2017.pdf>).

The Netherlands

The Netherlands had general elections earlier in 2017. The main international education policy preoccupation is "about strategies to find alternative ways to collaborate and engage with a post-Brexit UK and academics and students in, e.g. North Africa and the Middle East where there are political uncertainties and have been political changes making collaboration or exchange more difficult." (Rosa Becker, NUFFIC). For the time being, the Netherlands are protected from anti-immigration policies which may impact international education.

Recent reports on cutting international student numbers by opposition parties in New Zealand, up to 22,000 as proposed by Labour¹⁹, in the run-up to the general election, may not have as negative an impact as we have seen in other countries where elections were won on the back of cuts in net migration, such as the general election in the UK in 2010. The Economist reports that *"the two main parties agree on many issues, and their country is not ideologically divided."*²⁰

New Zealand

Brett Berquist (University of Auckland) reflects on the current political climate: *"New Zealand politics are left of centre compared to the UK and the US. There is broad support within government and the public that immigration is important to the country's future and that university IE [international education] is essential to talent acquisition to an innovative economy, hence our progressive post-study work rights of up to 3 years after a one-year minimum study qualification. The current election cycle is a debate on finding the right balance for the labour supply to keep the economy moving forward while not overburdening the infrastructure to welcome immigrants to our country. It's not about shutting it down or getting rid of international students."*

New Zealand's strategy to subsidise international PhD students at the same rate as their domestic counterparts is a good illustration of this²¹. This is a recognition of the importance placed on academia in the country and that, while election victory is important, an effort should be made to ensure that it does not affect the country's competitiveness and appeal to global talent.

United States

The education experts single out the UK and the US as the countries with the most challenging environment to their international education sectors. NAFSA's Executive Director and CEO, Esther D. Brimmer, acknowledges international students and scholars' anxiety because of the current political climate, and states the firm commitment of the university sector to international scholarship: *"We know potential international students and scholars closely watch political developments, especially when they affect the level of welcoming in the host country."*

While hard data on this autumn's enrolments are still being collected, anecdotally we are hearing concerns from international students and scholars about their safety and ability to pursue their degree. However, this has led to a remarkable outpouring of support from university communities, particularly the #YouAreWelcomeHere and #WeAreInternational campaigns in the United States and the United Kingdom, respectively, to welcome international students and scholars and dispel their concerns."

David Comp (Columbia College Chicago) summarises the impact of the above as *"entering a new geopolitical climate that I believe will reshape the global power structure and one that no longer sees the US and the UK as leaders. The impact that this will have on international [education] is unknown. I believe that both the US and UK will still be seen as higher education destinations but immigration policies that project that international students are not welcome or will have unnecessary challenges related to visas will make other markets more attractive."* The Trump administrations present a stark contrast to the message of welcome which the Obama administration conveyed internationally: *"The Obama administration projected a friendly and welcoming atmosphere for international students and frequently spoke about the importance of exchange and international students coming to the US during his trips abroad. Conversely, while the Trump administration is still relatively new, early rhetoric and executive orders from President Trump on policies such as the immigration travel ban specifically targeting those from certain Muslim countries and most recently on Deferred Action for Childhood Arrivals (DACA) policy – not to mention his response to the racist neo-Nazi march in Charlottesville, Virginia – are seen by many from abroad as a very unwelcoming environment. Additionally, many prospective international students are concerned that once they begin their program of study in the U.S. that some new law or policy will have a significant impact on their ability to complete their degrees and it is simply not worth the risk to come study in the U.S. in the first place."*

In summary, the political swings experienced in the UK and the US are unlikely to be replicated elsewhere. It is too early to estimate the impact of their policies on the education sectors' international engagement – the international mobility of students, partnership collaborations in teaching and research or the mobility of researchers.

Jane Knight sees the international education as being *"reactive to political changes"*, the latter acting as *"a corrector to previous events"*. However, she reminds us that international engagement is a *"process and an agent of change. It is the latter we should focus on and be mindful of the bigger picture there. Hence the future seems to be calling for a more inclusive and mutual higher education engagement"*.

¹⁹ PIE News (2017), New Zealand Election: Main Parties Define International Education Policies; <https://thepienews.com/news/new-zealand-election-intl-education-policies/>.

²⁰ The Economist Espresso 22 September, 2017; <https://espresso.economist.com/2e09926f3de94fa8c07ac5a8f3edc5cd>.

²¹ International Education, Immigration and Research: a New Zealand success story, IEAA Vista, Winter 2017.

6.1.2 Future engagement with China

China is the world's largest source country for international students. The latest data from the UNESCO Institute for Statistics show that over 800,000 Chinese students study outside their home country at tertiary level²²; this is 17 per cent of the globally mobile students (latest estimates show 4.6 million students). In many countries' international recruitment has become reliant on China. China's one-child policy, introduced in the 1970s, led to a peak in the tertiary education population aged 18–22 in 2010. Estimates from the United Nations Population Division show a drop in the tertiary population (18–22 years old) by over 20 million in the next decade²³.

In addition to its role as a major country of origin for students, China is becoming a "pacesetter" with 57 universities in the world's top 500²⁴. The Times Higher Education described China as the country with the "highest density of leading institutions in the developing world"²⁵.

"The number of students studying abroad continues to surge not only as students look for quality education around the world, but also because universities aspire to be internationalised by having more international students on campus and at the same time sending more students to study abroad" observed Chiao-Ling Chien from UNESCO Institute for Statistics on the interplay between push and pull factors behind the global mobility of students. Several interviewees referred to the rise of new players with particular reference to China, with a few also mentioning India.

"All this [is] due to a deliberate political change after 1998, when the Chinese government started serious excellence initiatives and wanted to become a destination for rather than a source of international student mobility. China also distinguishes itself substantially from the other main study destinations in that international students, as well as the study abroad of their students, [seem] to be part of a more holistic economic and growth policy whereas in the other main destinations international students are first and foremost considered important for their direct economic value." (Uwe Brandenburg, CHE Consult)

"China, already seeking to boost its global economic role as the United States withdraws, will no doubt play a more active role in higher education internationalisation." (Altbach and de Wit, 2017)²⁶. China's role as the new world leader has attracted discussion among economists in the media and is in contrast to the diminishing role of the US²⁷.

This points to a shift from China as a major source country for international students to an emerging host destination. While growth in numbers of students studying abroad is slowing down because of demographic factors, China's universities are beginning to occupy a prominent place among the world's best institutions and are enjoying a growing appeal with potential international and domestic students. Recently, the Ministry of Education revised its international student recruitment targets from 300,000 to 500,000 by 2020.

Based on this, there are clear implications for countries reliant on recruitment of Chinese students:

- i. There is a significant slowdown in growth forecast in demand from China, with demographics being a key factor.
- ii. China mainly recruits international students from the East Asia region, so it is likely to emerge as a key competitor in the recruitment of international students in the region.
- iii. Continued investment in higher education and concentration of research funds into a smaller number of universities, under initiatives such as project 985, will continue to push Chinese universities up the world's league tables.

There are early signs of possible changes in the regulatory environment for transnational education (TNE) in China to tighten the quality controls of Sino-foreign education provision²⁸. This is another strong signal that China is changing the terms of its international education engagement.

“ The question should be what does the public want from internationalisation, not what do we want. ”

John Hudzik

²² <http://uis.unesco.org/en/uis-student-flow> (Data accessed 22 September 2017).

²³ British Council (2012), The Shape of Things to Come in Higher Education: Emerging Trends and Opportunities; https://www.britishcouncil.org/sites/default/files/the_shape_of_things_to_come_-_higher_education_global_trends_and_emerging_opportunities_to_2020.pdf.

²⁴ Calderon, A. (2017), What 15 Years of Global Ranking Says about HE trends; <http://www.universityworldnews.com/article.php?story=2017082915474677>.

²⁵ Times Higher Education (2016), BRICS & Emerging Economies University Rankings 2017: Results Announced; <https://www.timeshighereducation.com/world-university-rankings/brics-and-emerging-economies-university-rankings-2017-results-announced>.

²⁶ Altbach, P and De Wit, H (forthcoming), Nationalism: The End of Higher Education Internationalisation?, in Weimer, L. (Ed), *Mosaic of Cultures*, EAI publication (forthcoming).

²⁷ The Economist (2017), Is China Challenging the United States for Global Leadership? <https://www.economist.com/news/china/21719828-xi-jinping-talks-china-solution-without-specifying-what-means-china-challenging-and-rachman>, G. (2017) for the Financial Times, Merkel, Trump, Xi and the contest for global leadership; <https://www.ft.com/content/249a422c-5f49-11e7-8814-0ac7eb84e5f1>.

²⁸ Quality Assurance Agency (2017), Country report: The People's Republic of China; <http://www.qaa.ac.uk/publications/information-and-guidance/publication/?PubID=3210#.WgiitGi0M2w>.

6.1.3 Are there ways to minimise negative impact of countries' policies on international education?

This section collates expert views of the international education community on how the sector can minimise the impact of populist policies, with a particular focus on the impact of tighter visa policies for international students and researchers. References were made as to how education can reach out to communities that might have felt excluded from the benefits globalisation has brought to the rest of the economy and society.

"The challenge for higher education internationalization is to strengthen the role of public diplomacy at home through public education and public engagement. The internationalization of teaching, research, and outreach needs to be better oriented to help mediate between the local and the global for the entirety of our societies." (Hudzik 2017)²⁹

A possible way to overcome barriers to student mobility is through technology and greater mobility of international education programs and providers. *"As new barriers to student mobility emerge due to immigration policies, institutions must experiment with new models of program mobility through transnational education and online learning. Likewise, if policies become more welcoming, institutions must leverage technology to quickly scale their outreach across multiple geographies."* (Rahul Choudaha, Study Portals)

A few interviewees distinguished between short-term and long-term effects. Immigration policies are likely to provide a *"short-term change whereas shifts in scholarships are likely to have a long-term impact"* (Uwe Brandenburg). The removal of subsidies for international students at the higher education institutions of Australia and the UK are an example of this long-term impact.

A few education professionals consider TNE to be less impacted by political transitions in the home country but add that *"the provider has to consider the impact of political transitions in host countries [where] they are operating"* (Rebecca Hall, Trade and Investment Qld). This is certainly supported by experience in the UK, as discussed earlier. A few professionals in the UK sector were of the view that barriers to international mobility, such as student visa, diverted efforts in the direction of a greater TNE engagement.

David Comp sees the international education profession playing a greater and more proactive role in *"opening minds for the future"*: *"We need to work to change minds at an early age such as when children are in elementary schools so that they understand the value and importance of diversity and the international community. Combating ignorance as soon as possible is critical because children brought up in homes where ignorance, fear and anti-education messages are part of the daily message are learning and adopting this frame of mind at an early age. Our children are our future government leaders and the voters who elect them. It will take time and will be an ongoing challenge to open minds for the future which I believe will help people be more open to and value difference which will have an impact on the international mobility of students."*

6.2 The future of international engagement

"Bringing down barriers" to the mobility of students, education providers, programs and research is a common thread among the interviewees' insights.

Through the means of technology, students can access world-leading experts irrespective of their geographical location. *"This environment allows the university to bring scientists, students and industry partners and solve problems". To make this approach work, "any barriers standing between the problem and its solution must come down"*. Another major shift in international collaborations is a move *"from bilateral to multilateral partnerships and widening the cross-disciplinary engagement across academic departments and their industry partners"* (Jeffrey Riedinger, University of Washington). A greater importance will be placed on fewer partnerships that will sustain in the long-run. Key considerations when choosing new partners include *"strong collaboration and willingness to reciprocate"* alongside their own partnership network and the potential new collaborators they will bring.



“The future of global engagement is about bringing down barriers and shamelessly trespassing boundaries disciplinary and geographically.”

Jeffrey M. Riedinger, University of Washington

²⁹ Hudzik, J. (2017), Introduction, in NAFSA (2017), *The Changing Landscape of Higher Education Internationalization*.

A similar view was echoed by Krista Knopper (TU Delft): *"Besides there being a shift from bilateral towards multi-lateral focused research collaborations taking shape within national boundaries and across continents, there is also a visible step being taken towards working in transdisciplinary partnerships. Within transdisciplinary partnerships, academics at universities link to societal partners engaged in applied research complementing the fundamental research environment of their universities. Additionally, multilateral partnerships of the future will, where appropriate, aim to look for industry involvement as well as without a doubt need to stress the importance of cross-disciplinary research where various fields meet such as technology-driven research and social sciences to ultimately create results with more longstanding valuable impact to tackle today's global challenges".*

In addition to China's growing role as an international study destination, other countries are emerging as student hubs, and their attractiveness is challenging the dominance of main English-speaking destination countries. *"In Asia, China, Malaysia, Republic of Korea, and Singapore have become new players to host increasing share of international students from Asia. In the Arab States, Saudi Arabia and the United Arab Emirates (Dubai) now outpace the United Kingdom in attracting students from the Arab States, and both have become the third and fourth most popular destinations (followed by France, the United States). In Sub-Saharan Africa, in addition to South Africa, which has traditionally hosted a large proportion of students from the region, Senegal and Ghana are increasingly enrolling more students from other countries in the region."* (Chiao-Ling Chien, UNESCO Institute for Statistics)

Mobility in all its forms – mobility of students, programs, education providers and research engagement – is set to continue to grow. However, there will be discernible shifts towards new players who are expected to make giant leaps in the international education space. These shifts will also challenge the current system of learning and funding, as reflected by Enzo Raimo from the University of Reading (UK). One of the changes in future will be *"a major shift in focus from location onto the learner and content, which can be facilitated through transnational education. A new type of associations is likely to emerge which add to each other's strengths and facilitate credit transfers and degree recognition. A significant barrier to this model is the current lack of portability of financial aid. Many countries' student loan and domestic funding are only accessible if education is attained at home. There are significant advantages in increasing the portability of the student funding. From a UK perspective, the majority of the countries are cheaper than the UK which will reduce the student borrowing significantly"* (Enzo Raimo, University of Reading).

The role of technologies will shape the way content is delivered and will make location irrelevant. *"It goes without saying that adoption of technology and innovative delivery methods will change the way we are working"* (Rebecca Hall).

"Foreseeing the future is not an easy task in the chaotic global environment we live in today. International engagement and transnational education, already seeing different patterns than the traditional divide between the North and the South, most likely will undergo an accelerating transformation. New players will become more dominant and the old ones more challenged. We see already manifestations of this in Asia, where countries such as Malaysia and at the regional level ASEAN are moving to the forefront in internationalisation. We see similar ambitions in other parts of the world, such as Colombia in Latin America, and Ghana in Africa. The dominance in absolute numbers will be still in North America, Europe, Australia, with likely China and Russia coming closer to them. However, their market share and their impact will probably diminish. Continental Europe will have to find its place in this new environment, either moving stronger towards further integration and international engagement or disintegrate and look inward" (Hans de Wit, Boston College).

Jane Knight echoes the heightened role of the virtual classroom and a growing room for programme and provider mobility. The future is about *"mutuality, not self-interest. Growing space for international provider and programme mobility, greater collaboration in curriculum design and innovation in teaching and learning."* She cautions that *"Double degree programs are increasing exponentially, but we have to be vigilant about the integrity of these degrees. They are becoming known as discount degrees because credits/workload for one degree is being double counted for two or more qualifications."*

Lucky Moahi relates to the above in the context of his native Botswana: *"Thus, future partnerships should be collaborative (rather than one way) between institutions in different countries so as to provide international experiences for students and indeed staff for capacity building; there will be more student mobility, curricula and co-curricula that ensure international exposure; demonstrated commitment to internationalisation by institutions through such pronouncements as mission statements; as well as facilitative administrative structures and policies."*

The partnership perspective and its link to international student flows in future was highlighted by Patrick Kee (SEGI University), with a strong emphasis on multilateral partnerships with established study destinations but also the growing economies of Asia: *"From a Malaysian perspective, our political stability over the last three decades has continued to escalate the recruitment of international students in both public and private universities to more than 150,000 and the government's ambitious goal is to reach 250,000 international students by 2025. I believe the goal can be sustained through both bilateral and multilateral partnerships with universities in the Asian region and developed countries like the UK, Australia, New Zealand and the US. There will be increasing demands in student mobility programs, dual or double award programs and decreasing demands on franchised programs due to recognition by the host countries where international students originate."*

Capacity building through transnational education is the approach adopted by the Commission on Higher Education in the Philippines. Double and jointly developed programs in niche subject areas are advanced by CHED. *"The TNE approach that CHED wishes to support is one that is developmental and responsive to the need to expand choices and access to quality higher education for Filipino students, in areas of study not presently available in the Philippines. The CHED had issued a list of the priority disciplines needed for the country's manpower development."* (Fay Lauraya, CHED). It is of a paramount importance that TNE programs support the local context. The growing importance of TNE in the country is further illustrated by a newly proposed "Transnational Higher Education Act" which has been through a first hearing in the Congress³⁰.

Similarly, continued growth in cost-efficient modes of mobility was conveyed from Colombia, where the importance of the "mobility of the minds" will exceed "physical mobility". Talking about the cost and decision student decision-making on whether to study at home or abroad, Giovanni Anzola-Pardo from La Salle University in Colombia concludes: *"The alternative in a win-win type of cooperation will be with the articulation of dual degree programs (undergraduate plus graduate mostly) either blended or online and co-tutelages between Colombian with foreign institutions to be appealing in the local arena. Lastly, with no doubt, with the broad implementation of information technologies to benefit online learning, the concept of mobility will be more based on the 'mobility-of-the-minds' rather than a 'physical mobility'. This means that new ways of interaction will concur in online platforms where different cultural and academic backgrounds may (or not) comply with the expectations of the new generation of learners..."*

Diversity in all its shapes is seen as another facet of the international education in future. *"Diversity should focus on the diversity of location; diversity of study areas; diversity in delivery models – how are we embracing online, TNE, industry-based learning approaches"* (Rebecca Hall).

TNE provides the means of reaching wider global audiences, beyond the small proportion of students who are globally mobile. *"The percentage of students who are internationally mobile, however, has remained remarkably constant at around 1.7% over the last 15 years, suggesting that most students are unable or unwilling to leave their home countries for tertiary education. The combination of rapid growth in demand and low international mobility rates creates a huge opportunity for transnational education. By taking education directly to students in their own country, universities can reach new markets by targeting the 98.3% of the global market for tertiary education that remains at home"* (Nigel Healey, Fiji National University).

“ Internationalisation is a process of change and a tool for dealing with the future. It is reactive to events and proactive to opportunities. We need to maintain a wider macro-perspective. Because it is an agent of change, international education can help with challenges like social cohesiveness, environmental impact, health and human rights, intercultural understanding and, equally, advances opportunities enhanced by technological advances such as a virtual global classroom. There is a need to maintain a view of the bigger picture and long-term opportunities. ”

Jane Knight

³⁰ For detail see: http://www.congress.gov.ph/legisdocs/basic_17/HB04565.pdf.

7. CONCLUSIONS

Early policies dating back in the 1980s have impacted international student mobility. Discontinued funding for universities, as illustrated by the removal of subsidies for international students in Australia and the UK, marked the beginning of the shift from “aid to trade” in international student engagement³¹. This push was further magnified by domestic policies which aimed to exercise control over education spending through controlling the number of domestic enrolments. Given their limited ability to grow domestic student numbers, higher education institutions pursued student recruitment overseas.

Over time, these policies, combined with the autonomy of education institutions to set the levels of tuition fees for privately funded students, led to significant increases in international student recruitment. Recognition by national governments that international students' tuition fee income makes a significant contribution to the economy, alongside the soft power that alumni bring when they return to the home country, led to government-backed education marketing and promotion campaigns overseas. National education brands were launched which contributed to an increased visibility of education institutions overseas.

The policy responses to the 9/11 events in the US were among the first examples of the inverse relationship between tighter student visa policies and growth in international enrolments.

The global financial crisis of 2008 led to an economic downturn in advanced economies and growing unemployment. Again, the policy response was the tightening of immigration policies and limiting of post-study work options. This was preceded by correction of student recruitment which was viewed by some as unsustainable, for example the recruitment to some vocational and further education colleges in Australia and the UK. As a result, for the first time in almost three decades, the number of international students in these countries started to decline. The Knight Review in Australia and its full implementation in 2012 reversed the declines in international enrolments. In comparison, no policy changes were made to student visa rules to the UK where growth stalled and remained at that level over the past five years. However, the recent move by the UK's Home Secretary Amber Rudd to take international students out of the government's net migration targets³² was welcomed by the higher education sector.

Broader international comparisons of Australia, Canada, Germany, Ireland, New Zealand show a positive relationship between growth in international enrolments, international student recruitment targets and post-study work opportunities. This research shows stricter student visa policies have not impacted the world's growth rate in student mobility. Rather, the short-term response to such policies is a diversion in student flows from one country to other countries. There are not sufficient data on researcher mobility to establish whether global research is affected as well.

There are other factors at play which affect international

student demand, though national governments may have less direct influence on them, such as education quality and academic rankings³³, the wider openness to the mobility of students, research, the international mobility of academic programs and providers, and bilateral trade.

The interviews with thought leaders in international education identified several emerging themes. Except for the UK and the US, the political climate in most countries does not pose a threat to international engagement. A few interviewees highlighted a geopolitical shift in global leadership, with China playing a more prominent role on a global stage. China is moving away from being a key source country for international students to becoming a study destination in its own right. This brings implications for countries reliant on international students from China on the one hand, and on the other, it highlights an emerging new competitor for students in the East Asia and South-East Asia region.

The interviews highlighted a strong feeling towards “bringing down barriers” to student mobility; barriers that stand in the way of solving the world's most challenging problems and get in the way of international collaborations.

In line with this, location is set to play a diminishing role in future. Supported by advances in technology, education programs can reach remote locations and engage with non-traditional university goers. It is no longer only the students who have to travel the world in the pursuit of education – academic programs and providers can do that too. International program and provider mobility will enable a much greater proportion of the global pool of tertiary education students, beyond the two per cent to benefit from international education³⁴.

Greater degree and credit recognition is required for the benefits of international education to be fully utilised. Financial aid which can be taken to other countries is a key enabler to that development. The future mobility is as much about the “mobility of the minds” as it is about physical mobility. There is an acknowledgement that the importance of bilateral and multilateral TNE partnerships will increase in future, with particular reference to double and joint degrees. Given the potential of collaborative arrangements to support capacity-building in the host country, it is likely they will attract wider government support through supportive regulatory frameworks and government funding.

The experts agree that there are uncertain yet exciting times ahead. However, there is much to be learned from the past, in an effort to understand the present and make projections about future directions. The key themes of mobility and diversity in all their manifestations will be critical to ensure sustainable and continued growth. The success of global international education will be in the sector's ability to innovate in response to shifting global economies, rapid technological change and the changing needs of students.

³¹ Ziguras, C. and G. McBurnie (2015, p.30), *Governing Cross-Border Education*, Routledge.

³² Financial Times (2017), Amber Rudd Urges Removal of Students from Net Migration data: Home Secretary on Collision Course with Theresa May over Immigration policy (8 November); <https://www.ft.com/content/1c51a9dc-c3c3-11e7-a1d2-6786f39ef675>.

³³ Hobsons (2014), League Tables are King to Foreign Students, http://universitybusiness.co.uk/Article/league_tables_are_king_to_foreign_students.

³⁴ Analysis of UNESCO Institute for Statistics data on international students at tertiary level shows that 1.7% only of the global tertiary students study abroad.

APPENDIX A: Policy changes in Australia and the UK and events in the external environment that impacted on international student enrolments*

Time	Education and immigration policy changes in Australia and UK	Events in the external environment which might have impacted on international enrolments
1980s	<ul style="list-style-type: none"> • Introduction of differential tuition fees by the Thatcher Government in the UK in 1981 • The Hawke Government in Australia allowed public universities to accept full-fee paying international students 	
Early-mid-1990s	<ul style="list-style-type: none"> • Introduction of block operating grant with a 'target' number of student places (1989 to 1997) in Australia, which affected domestic school leavers only. The implication of this policy is university can only pursue growth outside Australia. • "Maximum allowed student numbers" policy in the UK in the period 1994–2002 introduced a formal cap on home students. Similar to the above – growth-minded universities can only grow if they recruit international students. • Expansion in education promotion and international student marketing efforts through IDP in Australia and the British Council's Education Counselling Service in the UK through the 1990s and 2000. 	
Late 1990s	<ul style="list-style-type: none"> • 1998 to 2004 – Australian universities receive the equivalent of the lowest upfront Higher Education Contribution Scheme (HECS), rate (under \$3,000) per student place for 'over-enrolments.' • The launch of the UK's first Prime Minister's Initiative (PMI) by Tony Blair in 1999 which targeted an increase in international student numbers by 75,000 (50,000 in HE and 50,000 in FE). • The launch of a major international marketing campaign in 1999 to promote Australian education. Former international students awarded additional points if applying for skilled migration to Australia³⁵. • 1999 – Introduction of Migration Occupations in Demand List (MODL) in Australia. 	<ul style="list-style-type: none"> • Australia and the UK mainly recruited students from South-East Asia in the 1980s and early 1990s (Singapore, Malaysia, Hong Kong and Indonesia). The Asian Currency Crisis in 1997-98 affected enrolments to the two countries
Early 2000s	<ul style="list-style-type: none"> • 2002–2012 Domestic student number controls in the UK with tolerance bands -+5% • 2003 – introduction of a 2-year study in Australia required for general skilled migration and greater flexibility in financial and English language requirements • 2005 visa assessment levels in Australia lowered and more vocations added to the main occupations in demand list (MODL) 	<ul style="list-style-type: none"> • Tighter immigration changes in the US following the 9/11 attacks resulted in a plunge in international demand in the US. The annual growth to Australia and the UK was double digit.
2005-2010	<ul style="list-style-type: none"> • 2005 – Continuation of student number controls, with changes in funding. Students are funded by discipline with a fixed 'Commonwealth contribution' and a 'student contribution'. While the tolerance band was set at +1% above the target numbers in 2006, HEIs were allowed to go up to 5%. Continued pressure on universities to pursue growth in student numbers outside Australia • The launch of the UK's second Prime Minister's Initiative (PMI2) in April 2011 which targeted an additional 100,000 international students (70,000 in HE and 30,000 in FE) by 2011. PMI2 also aimed at an increase in international partnerships between the UK and other countries. • 2009 – tighter student visa rules introduced in Australia/ closure of many private education providers 	<ul style="list-style-type: none"> • Global financial crisis impacts in Western Europe and North America in 2007–2008. Early signs in a slow-down in demand from India to main English-speaking destination countries, which can be partly attributed to slow down in offshore-based worker remittances from countries affected by the crisis.

Time	Education and immigration policy changes in Australia and UK	Events in the external environment which might have impacted on international enrolments
2010–2012	<ul style="list-style-type: none"> Continued appreciation of the Aus\$ contributed to a significant increase in the cost of living and tuition and affected the affordability of Australia as a study destination. As a result, international enrolments slowed down. The continued closure of VET and further education colleges in Australia and the UK. Tighter rules for skilled migration to Australia were introduced in 2010 Closures of FE colleges and other education institutions started in 2010. In addition to big reductions in FE students, the progression pathways into higher education were severed. Since then, around 900 education providers lost their ability to recruit internationally and were removed from the UK Home Office register (Ratcliffe 2017). Reported attacks on Indian students in Melbourne and Sydney and tighter visa rules impacted on the desirability of studying in Australia The above was reported as a “perfect storm” in the media, and Universities Australia stated that “perceptions that Australia is no longer welcoming to international students have arisen and universities have been caught up in the collateral damage.” Since the start of international student record keeping, the numbers of international students in Australia dipped in 2011 and 2012 In 2011 the Australian Government commissioned Michael Knight to undertake a strategic review of the student visa system Similar to Australia, after decades of continuous government support and incentives for international recruitment, there was a U-turn in policy in the UK. Tighter student visas and post-study work rules were introduced in 2012. This marked the first dip in international enrolments in almost three decades³⁵. Introduction of demand-driven system in Australia and full removal of domestic student number controls in 2012 The Australian Government accepted all 41 recommendations of the Knight Review and implemented most in 2012. Changes to the post-study work route were made in 2013³⁷. 	
2013–present	<ul style="list-style-type: none"> Streamlined student visas were introduced for higher education students in Australia in 2014 Student number controls for home students were fully removed in 2016 in the UK Continued plateauing of international enrolments in the UK Early indication of declines in EU enrolments into the UK following the UK’s referendum vote to leave the EU 	<ul style="list-style-type: none"> Referendum on the UK’s membership of the EU in favour of the vote to leave (23 June 2016) Election of Donald Trump as President of the US in 2016 President Trump issues travel ban for citizens of 6 mainly Muslim countries in the Middle East and Africa to travel to the US

³⁵ Spinks, H. (2016), Overseas Students: Immigration Policy Changes 1997–2015; http://www.aph.gov.au/About_Parliament/Parliamentary_Departments/Parliamentary_Library/pubs/rp/rp1516/OverseasStudents.

³⁶ HEFCE (2013), Global Demand for English Higher Education, <http://www.hefce.ac.uk/pubs/year/2014/201408a/>.

³⁷ Australian Government (2012), Government Response to the Knight Review of the Student Visa Program; http://shanghai.china.embassy.gov.au/files/hkng/HOME_KnightReviewStudentVisa.pdf.

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EXECUTIVE SUMMARY

This research aims to establish to what extent political events affect international education demand and engagement. It analyses international student flow to major study destinations over the past three decades and investigates how policy influences international education engagement.

Over 30 international education thought leaders and experts from 15 countries commented on the long-term impact of political events on international education. Some reflected on the policies in their home countries and offered a broader perspective on what is to come next in international higher education.

An historical overview of international education – Australia and the UK

Since the 1980s, government policies in Australia and the UK have incentivised and supported the expansion of international student recruitment. Reductions in public spending on universities manifested in the removal of subsidies for international students, and tuition fees were introduced to make up for the gap in funding. Higher education institutions in the two countries have autonomy to set tuition fee levels for privately funded students, which provides a strong incentive for international student recruitment.

The introduction of student number controls in the early 1990s for home students significantly limited the ability of higher education institutions to grow domestically. Their only option to expand was to recruit international students. The student number control policy provided further stimuli for growth-seeking institutions to expand their international student numbers.

Government-led education promotion campaigns overseas started in the mid-to-late 1990s, which contributed significantly to an increased global visibility of these education sectors. The two countries launched marketing campaigns under a national education brand and introduced international student recruitment targets. Streamlined student visa policies and post-study work opportunities backed their marketing campaigns and had a positive impact on international enrolments. The campaigns continued until the global financial crisis of 2008, which marked a stark change in government policy in the two countries.

More recent events and their effect on the international education landscape

International enrolments to main English speaking study destinations (US, Canada, Germany and New Zealand) since 2000 are examined with a focus on major politically charged events:

- policy responses to the events of 9/11
- policy responses to the global financial crisis of 2008
- enrolments post-2012
- early indications of the impact of Brexit and the travel ban imposed by the Trump administration on international student demand.

In 2010, after decades of government-led pro-internationalisation policies, shifts in political will started to take place. The reforms started with closures of vocational and further education colleges (2009 in Australia, and shortly after in 2010 in the UK). Tighter student visa rules followed. For the first time in almost three decades, significant declines in the numbers of international students took place in both countries.

Time-series analysis of international study destinations (Australia, the UK and the US) shows a strong association between student visa policies, including post-study work opportunities, and international enrolments. The US was the first country among the main English speaking destination countries to demonstrate a positive relationship between tighter student visa policies and a decline in international enrolments, following the events of 9/11.

This research found a positive relationship between the presence of post-study work policies which allow students to gain temporary employment after graduation, and growth in the number of international students (based on comparative data from Australia, the UK, the US, Canada, New Zealand and Germany). The analysis found that student visa rules do not affect the overall global mobility of students. The number of globally mobile students has grown significantly in recent history, and changes in student visa and immigration policies in certain countries have served to divert student flows from one country to another.

What does the future hold for the global international education sector?

The study concludes with a look towards the future and features interviews (conducted in July and August 2017) with thought leaders from across the world. Key themes emerge from these discussions around the potential shape of international education in the years to come.

Most of the expert panel believe that inward-looking policies, such as protectionism and constraints to immigration, affect international student demand in the short-term. The impact, however, is limited to the country in question. It is unlikely these policies will affect the long-run trajectory of international engagement. Some countries were considered clear “winners” when such political changes take place, such as Canada, Ireland and Australia, all of which have gained in international student recruitment in the recent years.

Further, a perception shared by many interviewees was that international engagement and mobility will become increasingly important. Many expect further growth in provider and program mobility and transnational education. A growing prominence is given to the mobility of education programs. This is believed to widen access to international education, through partnership collaboration between higher education institutions globally and through flexible delivery modes.

The study found that the rise of these programs will challenge the current model of higher education delivery and funding. Wider degree and credit recognition will facilitate the growth of international programs' mobility, and a more flexible student funding system will facilitate further growth in student mobility.

A number of interviewees observed a shift from bilateral to multilateral international partnerships, which are likely to be sustained in the long-run. Multilateral partnerships bring the benefits of a wider network of like-minded institutions. Often, partners' networks of collaborative arrangements are a key consideration before a partnership is forged.

The silver lining of international engagement, as gloomy as it seems at present, is that international education “provides tools to deal with the future” (Jane Knight, University of Ontario). The long-term direction of travel for engagement is to “bring down boundaries” that stand in the way of mobility in all its shapes (of students, research, academics, programs and providers), and stand between the researchers and “the world's most vexing problems” (Jeffrey Reidinger, University of Washington) they are trying to solve.