



Attracting and retaining international students in the EU

EMN Synthesis Report
for the EMN Study 2018

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Explanatory note

This Synthesis Report was prepared on the basis of National Contributions from 25 EMN NCPs (AT, BE, BG, CY, CZ, DE, EE, EL, ES, FI, FR, HR, HU, IE, IT, LT, LU, LV, MT, NL, PL, PT, SE, SK, UK) according to a Common Template developed by the EMN and followed by EMN NCPs to ensure, to the extent possible, comparability.

National contributions were largely based on desk analysis of existing legislation and policy documents, reports, academic literature, internet resources and reports and information from national authorities. Statistics were sourced from Eurostat, national authorities and other (national) databases. The listing of Member States in the Synthesis Report results from the availability of information provided by the EMN NCPs in the National Contributions.

It is important to note that the information contained in this Report refers to the situation in the above-mentioned Member States up to and including December 2018 and specifically the contributions from their EMN National Contact Points. More detailed information on the topics addressed here may be found in the available National Contributions and it is strongly recommended that these are consulted as well.

EMN NCPs from other Member States could not, for various reasons, participate on this occasion in this study, but have done so for other EMN activities and reports.

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EXECUTIVE SUMMARY

This Synthesis Report presents the main findings of the EMN Study on Attracting and retaining international students in the European Union (EU). The study is very topical in light of the transposition of the Students and Researchers Directive ((EU)2016/801) which sets out a common framework for admission and residence of students from third countries in the EU. This study explores the national policies and practices in place in Member States to attract international students from third countries. The study also examines whether Member States have adopted any policies or special incentives to retain international students following their graduation. A key focus of the study is the underlying policy rationale for attracting and retaining international students and whether this is a policy priority in Member States.



KEY POINTS TO NOTE

- 1. Almost half of all Member States consider attracting and retaining international students a policy priority**, although the degree to which this is a priority significantly differed across Member States. Other policy priorities such as preventing misuse of this legal migration channel for third-country nationals were also identified.
- 2. The number of international students coming to the EU to undertake their studies has increased steadily over the recent years. In 2017, over 460 000 first residence permits were issued for study reasons in the EU.** The most popular destinations for international students coming to the EU in 2017 were the United Kingdom, France and Germany which issued around half of all first residence permits for study reasons in the EU. In terms of the share of third-country nationals of all students, data for 2017 for 14 Member States showed that the highest share of international students from all students was in Cyprus (18 %), Germany (10 %), Hungary (9 %), Ireland (8 %) and Latvia (8 %).
- 3. The highest number of international students came to the EU from China, the United States and India.**
- 4. The main policy drivers** for attracting and retaining international students included the internationalisation of HEIs and increasing financial revenue for the higher education sector, contributing to economic growth by increasing the national pool of qualified labour and addressing specific (skilled) labour shortages plus tackling demographic change.
- 5. Both national governments and HEIs alike were found to implement comprehensive promotional activities and campaigns in many Member States to attract international students, often combining their efforts.** The most common approaches in place to attract international students were promotional activities and dissemination of information targeted at prospective international students, in some cases, taking place directly in selected countries of origin.
- 6. Member States identified a number of common challenges in attracting international students.** These included: limited availability of courses taught in foreign languages, especially in English; lengthy processing times of applications for visas and residence permits, especially for Member States with insufficient representation in third countries; insufficient promotional activities and scholarship opportunities; as well as (affordable) housing shortages.
- 7. Post study retention measures were found to be in place in the majority of Member States and were mostly policy-related**, seeking to facilitate access to the labour market by eliminating certain restrictions to labour market access for international graduates.
- 8. Some factors which significantly contributed to student attraction did not necessarily benefit student retention.** Programmes taught in English have had positive impacts on attracting international students to Member States but can hamper the long-term integration of international students into the labour market, unless language learning and other integration measures take place during the period of study.
- 9. Member States aim to balance policies to attract and retain international students with measures to prevent abuse of the student route for other migration purposes** by ensuring opportunities to study and work are made available only to those with a genuine intention to pursue higher education in the EU.
- 10. Bilateral and multilateral agreements with third countries have created important frameworks for cooperation, including in relation to student mobility.** The majority of these agreements were aimed at exchanging experiences and practices, teachers, students and researchers, as well as the establishment of fellowships.

1. SCOPE OF THE STUDY

The subject of this Study is attracting and retaining third-country nationals who are granted residence permits or long-stay visas for the purpose of studies, and/or are undertaking a higher education degree (Bachelor, Master or PhD level). In this sense, the term ‘international student’ used throughout the Study refers to students from non-EU/EEA countries - i.e. third-country national students. The following categories are excluded from the scope of this Study: researchers, part-time students, third-country national family members of EU citizens, vocational post-secondary education students, trainees and apprentices, au pairs and beneficiaries of international protection. For the purpose of this Study, higher education comprises tertiary education programmes at levels 5 (Short-cycle tertiary education), 6 (Bachelor’s or equivalent), 7 (Master’s or equivalent), and 8 (Doctoral or equivalent) of the International Standard Classification of Education (ISCED). The Study only focuses on full-time students, covering the period 2013-2017 for statistics and 2012-2018 for policy developments.

2. AIMS OF THE STUDY

The Study aimed to explore the national policies and practices in Member States to attract and retain third-country national students. The Study examined the incentives in place at national level to encourage international students to study in EU Member States and, in some cases, to stay on following graduation to seek employment or to enter the labour market. It further explored the admission conditions in place in the Member States and the extent to which those conditions facilitated the process of attracting and retaining international students.

In light of the recent transposition of the Students and Researchers Directive, the Study also aimed to capture the way in which Member States transposed the relevant provisions of this Directive (with regard to international students only), for example the right to remain in the Member State for a specific period of time following graduation. Furthermore, the Study provides a brief overview of the bilateral and multilateral cooperation agreements with third countries covering international students. Finally, it aimed to illustrate common challenges and good practices developed by Member States with regard to the attraction and retention of international students.

3. METHOD AND ANALYSIS

The information used by this Synthesis Report was based primarily on secondary sources as provided by 25 EU Member States in their national contributions for this study. National contributions were largely based on desk analysis of existing legislation and policy documents, reports, academic literature, internet resources and reports and information from national authorities. Statistics were sourced from Eurostat and also provided by national authorities. The full overview of the collected statistics is provided in the Statistical Annex to this report.



4. NATIONAL LEGAL AND POLICY FRAMEWORKS FOR ATTRACTION AND RETENTION OF INTERNATIONAL STUDENTS

The Students and Researchers Directive ((EU) 2016/801), whilst not limited to students, is the legislative instrument at EU level setting out the conditions of entry and residence of third-country nationals for the purpose of studies. The Directive aims to make the EU a more attractive destination for international students by harmonising admission conditions. At the time of writing this report, the majority of Member States had already completed the transposition of the Directive, or aimed to complete it by early 2019. Denmark, Ireland and the United Kingdom do not take part in the Directive.

In 2017, over 460 000 first residence permits were issued for study reasons in the EU, an upwards trend for the years 2013 to 2017. The most popular destinations for international students in the EU were the United Kingdom (almost 180 000 new permits issued in 2017), followed by France (just above 80 000 first permits issued in 2017) and Germany with just about 40 000 first permits. In terms of the share of third-country nationals of all students, data for 2017 for 14 Member States showed that the highest share of international students from all students was in Cyprus (18 %), Germany (10 %), Hungary (9 %), Ireland (8 %) and Latvia (8 %).

In 2017, the highest number of international students coming to the EU was from China - accounting for almost a quarter of all first study permits (118 830 permits) - followed by the United States (33 000 permits) and India (32 317 permits). Ukraine (16 248 permits), Morocco (13 472 permits), South Korea (11 358 permits), Brazil (10 414 permits) and Turkey (9 941 permits) were also amongst the top countries of origin for international students in the EU.

The main recent policy changes introduced by Member States included measures to, on the one hand, facilitate the administrative process of immigration as well as to ease access to labour market for international graduates. A few Member States, notably Estonia and Spain, liberalised their family reunification rules with regard to international students. In some Member States, special integration programmes have also been established. For example, Estonia introduced a “Welcoming Programme”, which aimed to ease the adaptation of foreign students (and others) to local life and launched a free migration advice service, provided by the Migration and Border Guard. On the other hand, in other Member States, legal and policy developments did not indicate a clear shift towards liberalisation. In some cases, policies became in certain ways more restrictive, including in Belgium and the United Kingdom, where student immigration rules have mainly focussed on preventing abuse of this legal migration channel.



5. ATTRACTING INTERNATIONAL STUDENTS

Both national governments and HEIs alike were found to implement comprehensive promotional activities and campaigns in many Member States, often combining their efforts. The most common policies in place to attract international students included promotional activities and dissemination of information targeted at prospective international students, for example through online portals or education fairs organised in third countries. Scholarships provided both by the state and HEIs, as well as availability of English-language programmes, constituted two additional important attraction factors.

The admission conditions for international students are determined by Articles 7 and 11 of the Students and Researchers Directive. As per the provisions of the Directive, all Member States require students to provide proof of acceptance by a HEI, proof of sufficient resources to cover subsistence costs and study costs and health insurance (except Belgium).

As regards tuition fees, public HEIs in general charged higher tuition fees for international students than for domestic or EU students. Exceptions here were the Czech Republic, Italy, Luxembourg and the Slovak Republic, where tuition fees were the same for all students. In ten Member States, tuition fees were capped, meaning that there was a state-imposed upper limit on the fees public HEIs were able to charge international students.

Common challenges encountered by Member States in attracting international students included: limited availability of courses taught in foreign languages, especially in English; lengthy processing times of applications for visas and residence permits, especially for Member States with insufficient representation in third countries; and insufficient promotional activities and scholarship possibilities.



6. RETAINING INTERNATIONAL STUDENTS

A main vehicle for retaining international students was found to be by providing them with an opportunity to stay in the Member State and seek work after graduation. Pursuant to Article 25(1) of the Students and Researchers Directive, the vast majority of Member States provided for a residence permit for the purpose of seeking employment or self-employment/starting up a business after completion of studies. Article 25 of the Directive stipulates that Member States shall provide for such a permit with a minimum duration of 9 months. The period of such permits ranged from nine months to 24 months in Member States.

The other most common retention measures included facilitation of labour market access, including exemption from labour market tests, exemption from salary thresholds where such conditions were in place and exemption from having to obtain a work permit. In the majority of Member States, there were no restrictions regarding the

job field in which the international student was able to seek employment or to set up a business. A few Member States, notably Estonia, have provided additional facilitation measures, such as provision of career counselling services and facilitation for family reunification. In contrast, retention policies implemented by HEIs generally aimed at bridging the gap between graduation and finding employment, by providing career counselling and assisting with finding internships and employment.

HEIs often collaborated with companies to facilitate job-seeking for international students. For example, in Sweden, HEIs had alumni programmes including mentorship programmes, which could help students to establish networks and contacts to employers. In Estonia, the Estonian Employers' Confederation organised days when foreign students studying in Estonian HEIs were able to shadow employees from a variety of companies and recognised companies operating in Estonia that had provided significant support for the work practice of foreign students.

Common challenges encountered by Member States in retaining international students included lack of competitiveness of the conditions offered on the labour market and the living standards in some Member States; a high national unemployment rate and unfavourable economic situation as well as challenges around extensions of permits, including long processing times. At an individual level, the lack of the necessary national language level to enter the labour market and the lack of professional and support networks were also found to hinder successful labour market integration.



7. BILATERAL AND MULTILATERAL AGREEMENTS

Member States have concluded various bilateral and multilateral agreements with third countries. The majority of these agreements aimed at exchanging experiences and practices, teachers, students and researchers, as well as the establishment of fellowships. Cooperation amongst HEIs in Member States and those in third countries was an important factor in mobility of students, teachers, researchers and/or academic personnel. Exchange programmes were found to be an important vehicle for fostering international student exchange and mobility.

1. INTRODUCTION

1.1. STUDY AIMS

The Study aimed to explore the national policies and practices in Member States to attract and retain third-country national students. It examined the incentives in place at national level to encourage international students to study in EU Member States and to stay on in the Member State following graduation. It further explored the admission conditions in place in the Member States and the extent to which those conditions facilitated the attraction and retention of international students. In light of the recent transposition of the Students and

Researchers Directive, the Study also aimed to capture the way in which Member States transposed the relevant provisions of this Directive, with regard to international students. Furthermore, the Study collected information to provide a brief overview of the bilateral and multilateral cooperation agreements with third countries covering international students. Finally, it aimed to illustrate common challenges and good practices developed by Member States with regard to the attraction and retention of international students.

1.2. SCOPE OF THE STUDY

The Study is based on National Reports from 25 Member States.¹ The focus of this Study is on third-country nationals who are granted residence permits or long-stay visas for reasons of studies, and/or are undertaking a higher education degree (Bachelor, Master or PhD level). For the purpose of this Study, higher education comprises tertiary education programmes at levels 5, 6, 7, and 8 of the International Standard Classification of Education (ISCED). The Study only focuses on full-time students, covering the period 2013–2017 for statistics and 2012–2018 for policy developments.

The term ‘international student’ used in the Study refers to third-country national students from non-EU/EEA countries. The definitions should be read in line with Article 3(3) of the Students and Researchers Directive.²

The following categories are excluded from the scope of this Study: researchers, part-time students, third-country national family members of EU citizens, vocational post-secondary education students, trainees and apprentices, au pairs and beneficiaries of international protection.

1.3. RATIONALE AND EU POLICY CONTEXT OF THE STUDY

The importance of attracting international students is well-recognised by the EU. Promoting the mobility of third-country nationals to the EU for the purpose of studies has been part of the EU’s policy as early as 1994 with the adoption of the Council Resolution on the admission of third-country nationals to the territory of the Member States of the EU for study purposes. This has to be seen also in the context of the Bologna Process, launched with the Bologna Declaration of 1999, which is one of the main voluntary processes at European level. While not an EU process, the Bologna Process led to the establishment of the European Higher Education Area (EHEA), currently implemented in 48 states.

The 2015 European Agenda on Migration reiterated the need for promoting the mobility of international students, calling for the EU to feature as an attractive destination for the talent and entrepreneurship of students, researchers and workers. In line with this objective, the international dimension of the Erasmus + Programme encourages student mobility from third countries, providing an opportunity for students from eligible partner countries to study in an EU Member State. In a recent Communication, the Commission reiterated the need for intensified efforts with regard to providing opportunities for students, both to demonstrate that there are legal migration channels in

1 All Member States have provided National Reports with the exception of DK, RO and SI. Denmark and Romania do not participate in the European Migration Network. Slovenia and Norway have decided not to participate in this Study but have done so for other EMN studies and reports.

2 “Third-country nationals who have been accepted by a higher education institution and are admitted to the territory of a Member State to pursue as a main activity a full-time course of study leading to a higher education qualification recognised by that Member State, including diplomas, certificates or doctoral degrees in a higher education institution, which may cover preparatory courses prior to such education, in accordance with national law, or compulsory training” (Article 3(3) Directive (EU) 2016/801).

place as alternatives to irregular migration and to contribute to a more competitive EU economy.³

In terms of the legislative framework, in October 2002, the European Commission put forward a proposal for a Directive establishing common entry and residence conditions for the purposes of studies, pupil exchange, unremunerated training or voluntary service. The Directive entered into force in December 2004 with a transposition deadline for Member States of January 2007.

The Council and the European Parliament adopted in 2016 the Students and Researchers Directive which is the result of the recast of the 2004 Directive on the conditions of admission of third-country nationals for the purposes of studies, pupil exchange, unremunerated training or voluntary service and the 2005 Directive on researchers, based on the 2011 evaluations of these Directives by the Commission. Three Member States (Denmark, Ireland and United Kingdom) did not take part in the adoption of the 2016 Directive and are therefore not bound by it or subject to its application.

The Students and Researchers Directive clarifies admission and residence requirements by setting out general conditions for admission, and specific conditions for researchers, students, school pupils, trainees, volunteers and au pairs. The new Directive still follows a sectoral approach for these groups. While it sets uniform and binding rules on conditions for admission for students, researchers, trainees and volunteers participating in the EU's voluntary scheme, provisions on other volunteers, school pupils and au-pairs are optional.

The Study is very timely in light of the transposition deadline of the Directive, and topical, given that the new Directive aims to make the EU a more attractive destination for students, in particular by providing a common framework for admission conditions, allowing them to work (for at least 15 h/week), as well as allowing students to stay on in the territory of the Member State for at least nine months after the completion of the period of study. Furthermore, notable procedural guarantees have been reinforced for all categories (decision on an application within 90 days and provision of a justification of a negative decision).



1.4. STRUCTURE OF THE REPORT

In addition to the introduction (Section 1), this EMN Synthesis Report consists of the following sections:

- Section 2: National legal and policy framework in Member States, including the scale of mobility, recent changes in national policies and the structure of national HEI systems;
- Section 3: Attracting international students, including special incentives and admission conditions;
- Section 4: Retention of international students, including national policies in place and initiatives of HEIs and the private sector;
- Section 5: Bilateral and multilateral cooperation with third countries, including measures to avoid brain drain and cooperation among HEIs.

³ European Commission (2018), Communication: Managing Migration in all its Aspects: Progress under the European Agenda on Migration, 4 December 2018, https://ec.europa.eu/commission/sites/beta-political/files/eu-communication-migration-euco-04122018_en_1.pdf.

2. NATIONAL LEGAL AND POLICY FRAMEWORK IN MEMBER STATES

This section examines the legal and policy frameworks in EU Member States regarding the attraction and retention of international students. It looks at the importance of

such policies, the scale of student mobility in the EU, recent changes in national policies, and finally, the governance of national higher education systems.



2.1. IMPORTANCE OF ATTRACTION AND RETENTION POLICIES IN MEMBER STATES

The importance attributed to attraction and retention of international students varied significantly across Member States. A large number of Member States explicitly considered this a national policy priority,⁴ while for other Member States attraction and retention of third-country national students was not identified as a specific priority.⁵

Economic considerations played a key role in many of the Member States that regarded this as a national policy priority. For example, the United Kingdom estimated that international students' export value in 2015 was £ 11.5 billion (approx. € 13.46 billion). Ireland reported an increase in the economic value of the international educational sector as an explicit goal, and Greece noted that the internationalisation of higher education and research can be an important factor in the wider effort for the country's economic recovery. Member States also considered the potential of international students important for future investment, economic growth and innovation. For example, the Netherlands reported attracting and retaining international students as part of its aim to be among the top-ranking international knowledge-based economies. Estonia, France, Germany and Spain reported the increase of the pool of qualified labour, addressing labour shortages, as well as the prospect of increased investment as the rationale for aiming to attract international students. However, it was not only economic benefits that were considered when it came to attraction and retention policies. Several Member States⁶ also reported that international students were considered important ambassadors to the Member State in which they study and a potential resource for future international partnerships.

In the countries that did not report attracting international students as a priority, the level of importance attributed varied. For example, whilst Member States like Austria and Belgium considered attracting talented students important, the policy focus was rather on tackling misuse

of the student route. Other Member States did not report attracting students as a priority because their focus was on other, or wider, policy goals. For example, in Greece and Sweden, the attraction of international students is considered an essential contribution to the wider goal of internationalising the national higher education system and research environments, whilst in Bulgaria, the main focus was on retaining domestic students and stimulating the return of Bulgarian students from abroad. Most countries that did not consider the attraction of international students a priority tended to have an overall lower number of international students (see Figure 3 below).

Of the Member States that participated in this study, 17 Member States⁷ reported that they had specific strategies to attract and/or retain international students. Estonia, Finland, Greece, Ireland, Lithuania, Poland, Portugal and Spain had all introduced strategies since 2012 that aimed to increase the internationalisation of their higher education sector. For example:

- Greece has a national strategy in place for attracting and/or retaining international students entitled "The Strategy of Higher Education in Greece, 2016-2020" of the Ministry of Education, Research and Religious Affairs. It *inter alia* follows the aim of increasing the internationalisation of Greek Higher Education, for example through the expansion of the networks of collaborating Higher Education Institutions with actors from the international academic community.
- Poland increased funding from the national budget to encourage further internationalisation, which was one of its explicit policy priorities. Bringing in international students aimed to increase the competitiveness of HEIs and to strengthen Poland's position in the international arena as a centre of science and education.
- Spain reported a set of operational aims and actions identified by its strategy to render its HEIs more

4 CY, DE, EE, EL, ES, FI, FR, HU, IE, IT, LV, NL, PL, PT, UK.

5 AT, BE, BG, CZ, LT, LU, MT, SK.

6 DE, EE, ES, FR, HU, IE, UK.

7 BE, DE, EE, EL, ES, FI, FR, HR, HU, IE, IT, LT, NL, PL, PT, SE, UK.

attractive to international students. This included improving the legal framework, offering internationally attractive courses and degrees, the promotion of international mobility of teaching and research staff, as well as facilitating the arrival of students from third countries. Part of the Spanish strategy also included the setting up of a new working group of national stakeholders to increase cross-institutional collaboration with regard to student immigration and improve the promotion of Spanish universities abroad.

It should be noted that although some Member States did not have a specific governmental strategy in place, this did not prevent HEIs from developing similar strategies or policies. For example, in Latvia, despite the absence of a national strategy, HEIs have developed their own strategies with the main aim of attracting international students. Among the countries that had such strategies in place,⁸ the level at which these were implemented differed: i.e. in certain Member States, strategies were primarily implemented at the national level,⁹ in others the focus lay rather on the regional or sub-regional level¹⁰ and in yet another group, both national and sub-national strategies were in place.¹¹ In some countries, this reflected the governmental structure. In Belgium and Germany, as a result of their federal structures, the primary competence in education matters belongs to sub-national entities (i.e. Communities in Belgium, Länder in Germany), which enjoyed considerable freedom in formulating education strategies. In the United Kingdom, national strategies were developed at the devolved government

level (England, Scotland, Wales, Northern Ireland). It is important to note that these strategies, whether they were implemented at a national or regional level, took into account HEIs' interests and tended to be developed in cooperation with them, as they formed an essential part of the implementation of the strategy.

Among the countries that had a strategy at the national level,¹² not all focussed on both attraction and retention. Hungary, for example, was interested in attracting international students, but less so in retaining them. Austria reported having a strategic national instrument in place for the retention of international students through its promotion of immigration of highly skilled third-country nationals in shortage occupations, but none specifically for their attraction. The United Kingdom (the most popular destination for international students in Europe and the second-most popular worldwide) considered the attraction of international students a major priority, but the legal framework regarding retention was relatively restrictive. Finally, it should be mentioned that in most Member States, HEIs played a central role in developing their own, independent strategies to attract international students.

Most Member States did not target specific fields of studies or subject areas with regard to the attraction of international students, however, among those that did, there appeared to be a considerable focus on ICT, high tech and RDI¹³ fields (EE, LU, PL). An exception in this regard was Italy, which notably targeted the fields of the arts, design and architecture.



2.2. TRENDS OF INTERNATIONAL STUDENT MOBILITY TO THE EU

In 2017, over 460 000 first residence permits for third-country nationals were issued for study reasons in the EU.¹⁴ The numbers show an upwards trend for the years 2013 to 2017, having increased from just above 410 000 in 2013.¹⁵ Figure 1 below presents the trends over time in the 6 Member States issuing the highest number of residence permits for study reasons.

The number of first residence permits for study reasons issued differed significantly across Member States. The United Kingdom is by far the most popular destination for international students in the EU, and has been consistently during the period 2013 to 2017. Indeed, in 2015, the United Kingdom issued almost as many residence permits for study reasons (229 097) as those issued by all other Member States in the rest of the European Union (241 159). The United Kingdom is also the second most popular destination for international students worldwide, after the United States¹⁶. The second most popular EU

destination is France, with just above 80 000 first permits issued in 2017 before Germany with just about 40 000 first permits.

2019. Please note that Bulgaria, Finland, France and the United Kingdom do not disaggregate their first permits issued for education between 'study reasons' and 'other educational reasons'.

Figure 4 below shows the proportion of third country nationals and EU nationals of the Member States' student populations. Data for 14 Member States in 2017 showed that Cyprus had the highest share of international students from third countries at 18%, followed by Germany (10%), Hungary (9%), Ireland (8%) and Latvia (8%). With the exception of Austria, Cyprus, Czechia and the Netherlands, third country international students generally seemed to form a more sizable proportion of the student population than mobile EU students. France did not

8 AT, BE, DE, EE, EL, ES, FR, FI, HR, HU, IE, IT, LT, LV, NL, PL, PT, SE, UK.

9 EE, EL, ES, FR, FI, HU, IE, IT, LT, PT, UK.

10 BE, PL.

11 DE, NL, SE.

12 DE, EE, EL, ES, FI, HU, IE, IT, LT, NL, PT, SE, UK.

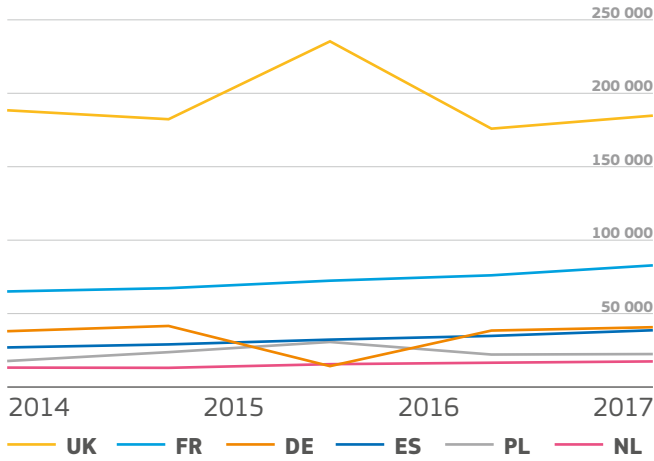
13 Research Development Innovation.

14 Statistics on Resident Permits – the main definition and methodological concepts, Eurostat 2015 According to Eurostat, first permits issued for study reasons relate "to persons granted a first residence permit and who are admitted to pursue a course of study at an establishment of higher or professional education (students). In accordance with Article 2(b) of the Council Directive 2004/114/EC, "student" means a third-country national accepted by an establishment of higher education and admitted to the territory of a Member State to pursue as his/her main activity a full-time course of study leading to a higher education qualification recognised by the Member State, including diplomas, certificates or doctoral degrees in an establishment of higher education, which may cover a preparatory course prior to such education according to its national legislation."

15 BG, FI, FR, and UK do not distinguish between permits issued for study reasons and other educational reasons. The numbers presented in this section include permits issued for other educational reasons for these countries.

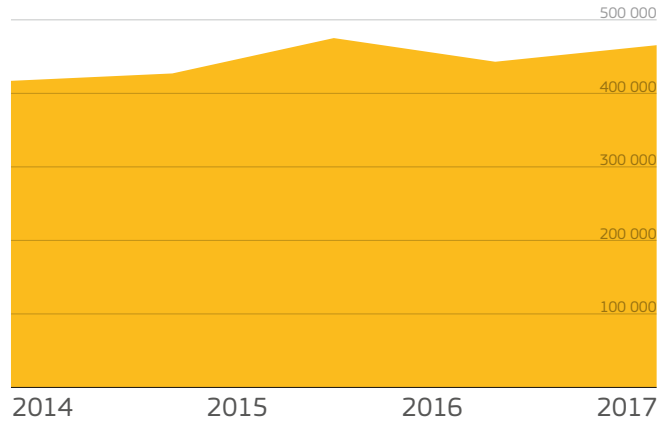
16 Universities UK, International Facts and Figures 2017.

Figure 1: Trends in the number of first permits issued in the top 6 Member States to third-country nationals for study reasons (2014-2017)



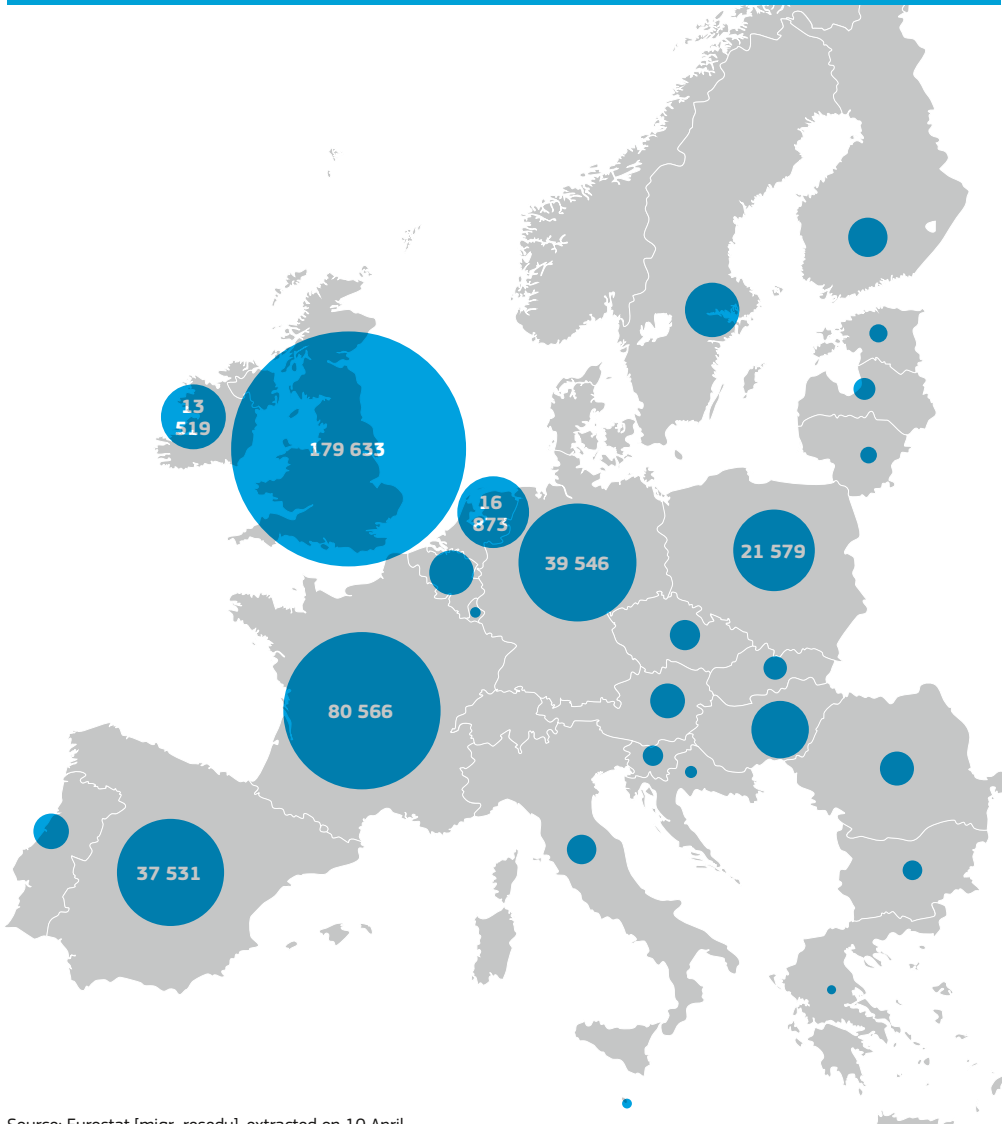
Source: Eurostat [migr_resedu], extracted on 10 April

Figure 2: Number of first residence permits EU- 28 countries issued to third-country nationals for study reasons (2014-2017)



Source: Eurostat [migr_resedu], extracted on 10 April

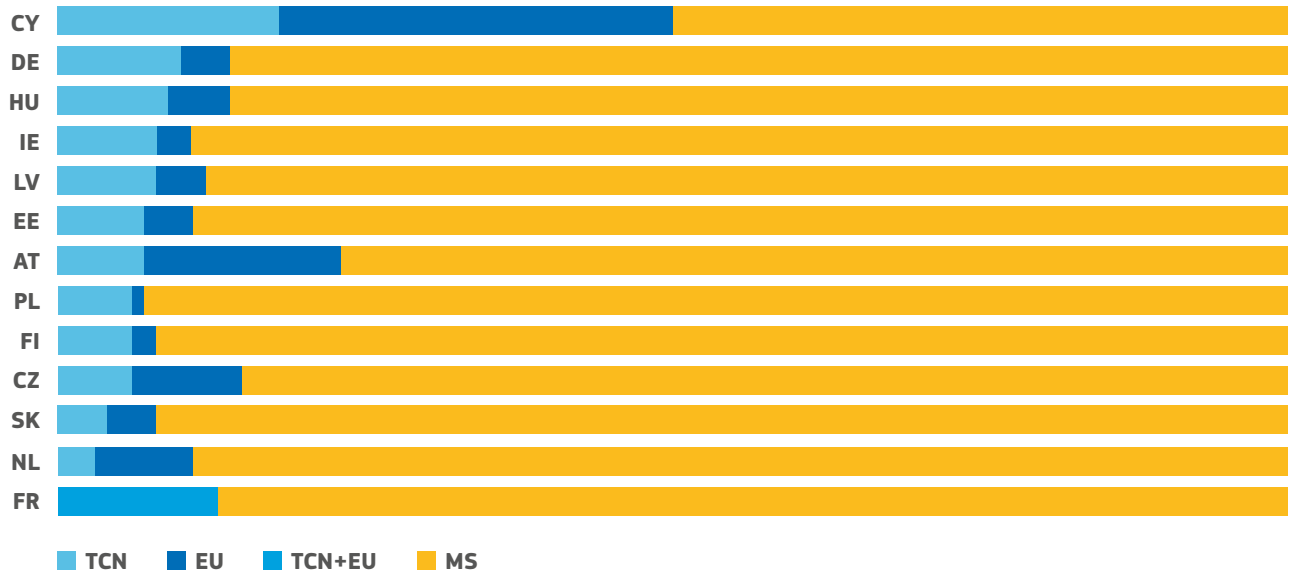
Figure 3: Number of first residence permits issued to third-country nationals for study reasons (2017)



EU- 28 countries	460 694
United Kingdom	179 633
France	80 566
Germany	39 546
Spain	37 531
Poland	21 579
Netherlands	16 873
Ireland	13 519
Hungary	10 779
Sweden	9 620
Belgium	6 248
Finland	5 094
Cyprus	4 861
Portugal	4 057
Austria	3 876
Romania	3 817
Czech Republic	2 934
Italy	2 893
Slovakia	1 729
Latvia	1 566
Slovenia	1 344
Bulgaria	1 267
Estonia	1 072
Lithuania	898
Croatia	472
Luxembourg	372
Malta	326
Greece	286

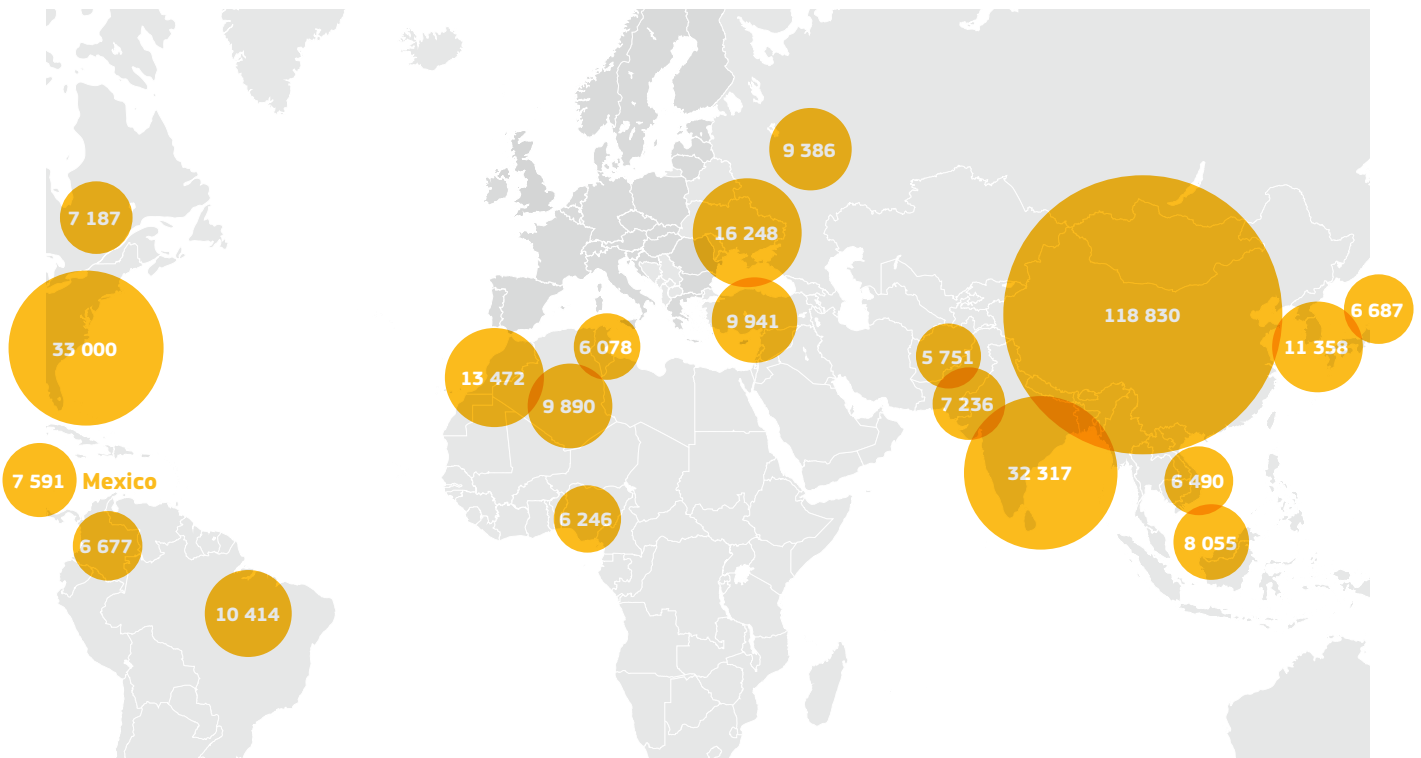
Source: Eurostat [migr_resedu], extracted on 10 April
 Please note that the 2015 Eurostat data for DE is inaccurate and the result of a data problem. The number of international students at HEIs in Germany did not drop in the respective year.

Figure 4: Proportion of international students among Member States' student population 2017



Source: EMN NCP reports (Based on available NCP reports only).

Figure 5: Top 20 countries of origin for first permits issued for study reasons in 2017



Nationality	Number	Nationality	Number	Nationality	Number	Nationality	Number
China including Hong Kong	118 830	South Korea	11 358	Mexico	7 591	Nigeria	6 246
United States	33 000	Brazil	10 414	Pakistan	7 236	Tunisia	6 078
India	32 317	Turkey	9 941	Canada	7 187	Iran	5 751
Ukraine	16 248	Algeria	9 890	Japan	6 687	Others	127 840
Morocco	13 472	Russia	9 386	Colombia	6 677		
		Malaysia	8 055	Vietnam	6 490		
							Total
							460 694

Source: Eurostat [migr_resedu], extracted on 10 April 2019

distinguish between EU and third-country students in its statistics.

The highest number of international students in the EU came from China, which made up almost a quarter of all first study permits issued to international students in 2017 (118 830 permits). China was followed by the United States (33 000) and India (32 317); other top countries of origin were Ukraine (16 248), Morocco (13 472), South

Korea (11 358), Brazil (10 414) and Turkey (9 941). (see statistical annex for top nationalities by Member State)

Regarding the popularity of different study fields among international students, business administration and law seemed to be the most attractive across the majority of Member States (see statistical annex), with social sciences, engineering and the arts and humanities fields also showing high levels of popularity.



2.3. RECENT CHANGES IN NATIONAL LAW AND POLICIES

Several Member States reported recent changes in national policies, among them the transposition of Directive (EU) 2016/801 which provides for a common framework of the conditions of entry and residence of third-country nationals for the purpose of studies (among other categories). The majority of Member States had already completed the transposition of the Directive,¹⁷ with those where transposition was still in process¹⁸ generally aiming for completion by the end of 2018 or early 2019. Denmark, Ireland and the United Kingdom did not take part in the Directive.

Furthermore, many Member States recently changed or were planning to change their policies in order to attract or retain international students. In a number of Member States, there seemed to be an emphasis towards making the administrative process of immigration and access to the labour market for international students easier and less restrictive.¹⁹ For example, in France, since January 2017, international students were exempted from the obligation to present a medical certificate to obtain their residence permit and were no longer required to have a medical check-up at the French Office for Immigration and Integration.

With regard to international students' right to work, changes were introduced to students' access to the labour market **during their studies**, as well as the facilitation of international graduates' transition into work. As regards the former, Estonia and Lithuania completely abolished the requirement for work permits for international students. Estonia allowed students to work without any limit on condition that such employment did not interfere with the studies. Lithuania allowed only doctoral students to work without limit, while all other students were able to work up to 20 hours per week (this requirement did not apply during the summer holidays) from the first year of studies. Similar developments were reported by Latvia, where Master's level students were given unrestricted access to the labour market during their studies and in the Slovak Republic, where the number of hours international students could work was doubled.

Access to the national labour market for international students **after their studies** was liberalised in the Czech Republic, Estonia, Ireland, Lithuania, Luxembourg, the Slovak Republic and Sweden. In Estonia, the (minimum) salary threshold was abolished for international graduates and they were exempted from the immigration quota, even if they left the country and returned at a later date. In Lithuania, requirements regarding work

experience and labour market tests were lifted. Luxembourg introduced an amendment in 2017 that allowed international students to change their status to salaried or independent workers, provided they had successfully completed the last year of a five-year university degree in Luxembourg or had successfully defended their doctoral thesis in Luxembourg, and the intended salaried work must also be related to the diploma obtained by the international student.

In Finland, national policies emphasised the promotion of local language learning and local employment opportunities. A new programme (Government Migration Policy Programme) aimed at identifying and using the labour and competence potential of migrants more efficiently and established the goal that workers, entrepreneurs, students and researchers should be offered an 'efficient and effortless' residence permit process. Spain also created a new residence permit for the purpose of job-seeking. In Ireland, the Third Level Graduate Programme, under which international students are permitted to remain in Ireland after graduation for the purpose of seeking employment, was extended from twelve to 24 months for graduates of programmes at ISCED level 7 and above. In Germany, the time-period to seek employment after graduation was extended to 18 months. France extended the duration of temporary residence for international students with a diploma at Master's level from six months to one year in 2013. This possibility was further expanded to international students with a professional bachelor's degree or PhD in 2016.

Other changes included the liberalisation of family reunification rules. In Estonia and Spain, students were able to invite their family members, and in Estonia and Sweden, students accompanying family members were given a combined residence and work permit, instead of a residence permit only.

Special programmes have also been established. Estonia introduced a "Welcoming Programme", which aimed to ease the adaptation of foreign students (and others) to local life and launched a free migration advice service, provided by the Police and Border Guard. In Germany, the promotion and successful placement of international students in voluntary or community work is increasingly regarded as an important factor for societal participation and as a tool for strengthening retention and improving academic success. Although the changes adopted by the above-mentioned Member States all pointed toward increasing liberalisation, they were found to vary

17 AT, BG, DE, EE, ES, FI, IT, LT, LU, LV, MT, NL, PL, PT, SK

18 BE, CY, CZ, EL, FR, HR, HU, SE

19 CZ, DE, EE, ES, FI, FR, IE, LT, LU, LV, SE, SK

considerably, depending on the previous national legal frameworks and policy approaches in place.

In other Member States, legal and policy developments did not indicate a clear shift towards liberalisation. In a few cases, policies became more restrictive.²⁰ For example, the United Kingdom on the one hand closed its post-study work route in 2012 and introduced ‘a genuine student rule’ to ensure that individuals on student visas were genuinely pursuing higher education opportunities, whilst on the other hand, it introduced a pilot programme in 2016 that allowed international students on masters courses at five selected institutions an extra leave period of up to six months after completing their studies. In 2017, an additional 24 institutions were added to the list. In Belgium, student immigration rules have been mainly preoccupied with preventing abuse, while Belgian HEIs

commented that they perceived policies had become more restrictive.

Other changes were with regard to tuition fees: for example, France increased tuition fees for third-country nationals for all university programmes and for those who enrol for the first time in a higher education cycle in France (see Table 3 below), marking the first time that international students were required to pay higher fees than their EU counterparts. Finland introduced tuition fees for non-EU and non-EEA students for programmes of studies conducted in a foreign language, following the example of many other Member States in which HEIs charge tuition fees for programmes in a non-native language. In Germany, one of the 16 Federal Länder (Baden-Württemberg) introduced tuition fees in the winter semester 2017/18 for non-EU students.



2.4. STRUCTURE AND GOVERNANCE OF NATIONAL HIGHER EDUCATION SYSTEMS

When it comes to the governance of national higher education systems, some common traits were identified regarding international students. In the vast majority of Member States, migration authorities were found to cooperate with HEIs.²¹ Some Member States institutionalised such cooperation and set up working groups, strategies or regular meetings to enable more formal and regular cooperation between HEIs and immigration authorities,²² while in others the cooperation remained informal and ad-hoc.²³ For example, in Spain, the Service for the Internationalisation of Education signed a collaboration agreement with the Spanish immigration authorities. The Czech Republic established a programme to streamline the visa/residence permit process for foreign nationals admitted to study at HEIs. The Malta College of Arts, Science and Technology (MCAST) holds regular meetings with the Ministry of European Affairs and Equality regarding the implementation of the national Integration Strategy. Sweden created a forum to improve coordination between Swedish authorities and organisations dealing with the internationalisation of HEIs. A notable exception was Bulgaria, which reported that there was no cooperation between migration authorities and HEIs.

In all Member States, HEIs were primarily responsible for providing support to international students during the application process for their chosen university and information on available courses. Even though some Member States had set up organisations at national or regional level that promoted the higher education sector in their country, these did not provide direct support to individual students.²⁴ Rather, these organisations provided information on the university application process and other issues of interest for international students.

Box 1: Application for Higher Education courses through ‘uni-assist e.V.’ - Germany

In Germany, international students can either apply directly to the HEI or to ‘uni-assist e.V.’ - the working service point for international student applications. Uni-assist is an association supported by roughly 180 HEIs which pre-evaluates international applications. Potential students who want to apply to one of its member HEIs can send their documents to uni-assist first. If all admission requirements are met, the documents are sent on to the HEI, which takes the final decision. Applications via uni-assist currently require a fee of € 75 for the first-choice course of study and of € 30 for each additional course of study.

When admitting international students to study programmes, in some Member States²⁵ only government-approved HEIs were authorised to admit international students, following an approval procedure. Most Member States²⁶ however, did not have such a procedure in place, and all HEIs were free to enrol international students to their study programmes. Nevertheless, as noted by Greece, international students still have to fulfil official instructions put forward by the Ministry of Education when enrolling in an HEI. The Netherlands reported that it followed a rather unique policy of ‘recognised sponsorship’, whereby the HEIs are not only authorised by the government to admit international students, but play an important role in the immigration procedure by acting as sponsors, and checking whether the student complies with the admission requirements for stay in the Netherlands and enrolment in the institution.

20 BE, CY, UK.

21 AT, BE, CZ, DE, EE, EL, ES, FI, FR, HR, HU, IE, IT, LT, LU, LV, MT, NL, PT, SE, SK, UK.

22 CZ, ES, FI, FR, HR, HU, IE, IT, LV, NL, SE.

23 AT, BE, CY, DE, EE, LT, SK.

24 CZ, DE, EE, FI, IT.

25 CY, IE, IT, LU, NL, PT, UK.

26 AT, BE, BG, CZ, EE, EL, ES, FR, HU, LT, LV, PL, SE, SK.

3. ATTRACTING INTERNATIONAL STUDENTS

In line with the general increase in the number of international students arriving in the EU in recent years, both Member States and HEIs made significant efforts to become attractive destinations for higher education. Promotional activities, the availability of English-language programmes, as well as other support in terms of housing and financing were considered important incentive measures and complemented the aim of the Students

and Researchers Directive to improve the legal standards for welcoming international students. Along the same line, Article 35 of the Directive also obliges Member States to make information on all the required documents for lodging an application easily accessible to international students, including information on the level of sufficient resources and their rights and obligations.



3.1. SPECIAL INCENTIVES FOR STUDENT ATTRACTION

3.1.1. Promotional activities and dissemination of information

In all Member States, promotional activities were carried out with the aim of attracting international students.

Promotional initiatives were centrally coordinated **at the national level** in 19 Member States,²⁷ demonstrating the importance national governments placed on this issue. The most common activity implemented at national level was that of an **online portal or website** showcasing the higher education programmes on offer in the respective Member State, as well as relevant information regarding the immigration procedure, recognition of foreign diplomas, etc.²⁸ These online activities were often implemented in the framework of **wider campaigns**, such as the ‘Study in Germany – Land of Ideas’ campaign in Germany, the ‘Study in Holland’ campaign financed by the government, the ‘Study in Sweden’ webpage and the ‘Ready, Study, Go! Poland’ campaign in Poland²⁹. In Belgium, such activities are organised at the Community level. Many Member States noted that **social media** had become an increasingly important dissemination channel for promotional activities.³⁰ A survey carried out in Germany revealed that for 50% of international students, online research was the primary source of information for study destinations.³¹ This suggests that online channels have become an important tool for student attraction. In some Member States, online campaigns were complemented by printed materials such as brochures, flyers and information leaflets.³²

Box 2: Study in Lisbon – Portugal

“Study in Lisbon” is a project developed by Lisbon City Council which aims to provide information space and offers housing initiatives to international students who choose to study in Lisbon.

This space has a reception that is open from Monday to Friday, and several partners are represented at the venue, which provides students with a wide and diverse set of information and services. In addition to the information provided by the municipality itself, issues related to residence permits, visas and passports are dealt with through the SEF (Immigration and Border) service. Students can access support in the search for accommodation, opening of bank accounts, transport system, Portuguese language courses, information on the national health system, contacts with embassies and employment opportunities or internships, among others.

The University Student Guide, published by the Lisbon City Council, is also distributed free of charge in order to provide further information on the city, culture, sports and leisure.

In many Member States, **centralised agencies** carried part of the responsibility for marketing³³. For example, the state agency ‘Enterprise Ireland’, which represents all Irish universities, institutes of technology and some colleges has been tasked with a key role in relation to the promotion of international higher education in Ireland, with 34 overseas offices around the world, under the ‘Education in

27 AT, CZ, DE, EE, ES, FI, FR, HR, HU, IE, IT, LT, LV, NL, PL, PT, SE, SK, UK.

28 AT (only a few activities are coordinated on national level), CZ, DE, EE, EL, ES, FI, FR, HR, IE, IT, LT, LV, MT, NL, PL, PT, SE, SK, UK.

29 In addition to DE and PL, centralised campaigns were also carried out by CZ, EE, FI, LT, NL and UK.

30 CZ, DE, EE, FI, IE, LT, LV, MT, SE, SK, UK.

31 Apolinarski, Beate/Brandt, Tasso (2018): Ausländische Studierende in Deutschland 2016. Ergebnisse der Befragung bildungsausländischer Studierender im Rahmen der 21. Sozialerhebung des Deutschen Studentenwerks durchgeführt vom Deutschen Zentrum für Hochschul- und Wissenschaftsforschung (DZHW), Berlin: BMBF. Available at https://www.bmbf.de/upload_filestore/pub/Auslaendische_Studierende_in_Deutschland_2016.pdf (in German)

32 CZ, DE, EE, ES, FR, IE, LT, NL, SK.

33 AT, BE, DE, EE, FR, IE, LT, MT, NL, SE, SK, UK.

Ireland' national brand. Similarly, the 'German Academic Exchange Service' (DAAD) had established a network with information centres in 60 European and third countries. In Belgium, "The International Unit of the Flemish Higher Education Council" (VLHUR International), supported the internationalisation process of Flemish higher education. Complementary to the activities of the individual higher education institutions, VLUHR International acted as a coordinator through cross-institution initiatives, such as the promotion of Flemish higher education as a knowledge destination. In the Netherlands, Dutch higher education was promoted abroad through the Netherlands Education Support Offices, established in 11 countries of strategic importance.

Box 3: UNI-Italia – Italy

In Italy UNI-Italia, the academic promotion and advising centre for studying in Italy, aims at encouraging academic collaboration with universities in third countries (i.e. China, India, Indonesia, Iran and Vietnam). The UNI-Italia Centres at Italian Embassies abroad are responsible for providing information on available courses to students interested in continuing their studies in Italy, offering support in the pre-enrolment procedures and providing assistance to foreign universities interested in cooperating with Italian universities.

Box 4: Netherlands Education Support Offices (Nesos) – the Netherlands

By order of the Dutch government, the Netherlands Education Support Offices (Nesos) have been established in various third countries and they position Dutch higher education strategically in these countries. Because the Dutch HEIs closely cooperate with the Nesos, this facilitates effective targeting and a common approach. Nesos have also positively impacted the attraction of foreign students, according to important stakeholders, such as the Ministry of Culture, Education and Science, leading to a considerable increase in international students from those countries (the number of students doubled between the academic year 2006/2007 and 2017/2018), stronger institutional collaborations and more ties with the Dutch Alumni network, connecting, international talent to the Dutch labour market, and with the Dutch organisation for the internationalisation of education (Nuffic).

HEIs often cooperated with centralised actors at national level on such activities but also made separate efforts to promote their programmes among international students. The most common activity carried out by HEIs was participation in educational fairs both at the national level and in third countries.³⁴ These were often organised in cooperation with diplomatic missions, cultural institutes or branch offices of the HEIs in the third country. For example, some HEIs in Ireland have established global centres around the world to support their marketing activities. In addition to education fairs, Austrian private universities and Irish, Lithuanian and British HEIs recruited students through recruitment agents, which have proved

to be an effective tool in marketing and recruiting international students. Many HEIs have established networks to combine and unite their marketing efforts, as is the case in Belgium, Germany, Finland, France, Ireland and the Netherlands, whereby relations were also established with other HEIs in third countries.

Box 5: Marketing efforts of Campus France – France

The Campus France agency is tasked with promoting French higher education abroad and welcoming foreign students and researchers to France. The agency organises a number of events worldwide every year to promote French higher education. In 2017, 55 operations were carried out, including 13 in Asia and 11 in the Americas zone. Over 300 French HEI participated in France and abroad, enabling them to not only directly meet the students and inform them, but also to meet their counterparts abroad with a view to signing cooperation agreements. In 2017, Campus France had in place 256 offices and branches located in 123 countries.

State actors and HEIs frequently focussed their activities on specific third countries. The target countries often corresponded to those with which bilateral agreements had been concluded (see Section 5) or those that were identified as key targets by marketing campaigns. For example, the Finnish "Study in Finland" campaign participated in fairs in Russia, China and South Korea. In Hungary, the HEIs offering medical degrees are the most active in carrying out promotional activities, targeting third countries such as India, Malaysia and Myanmar.

Box 6: Study in Greece – Greece

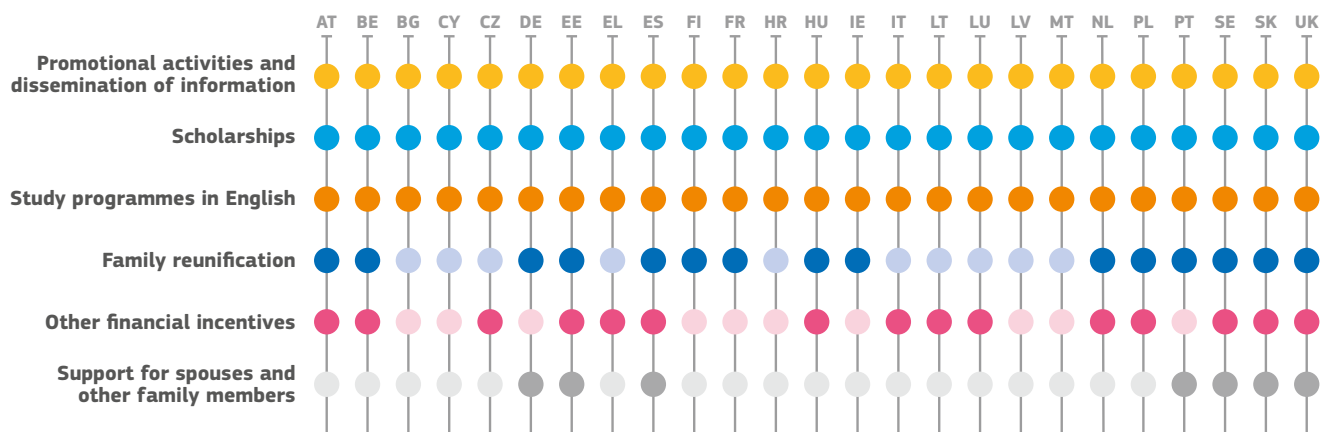
Since 2014, the "Study in Greece" platform has been the official web portal of the Greek state, providing information and support regarding studying and living in Greece. It is addressed to, among other categories of migrants, international students who wish to study, or are already studying, in Greece for a higher education degree. The portal is an official source of information for studies in Greece and is under the auspices of the Ministries of Foreign Affairs and of Education, Research and Religious Affairs. The above Ministries, as well as the Greek Embassies and Diplomatic Authorities of Greece abroad, have a link to the "Study in Greece" portal on the homepage of their web sites. The platform has received a number of distinctions and awards, with presentations on television, radio and newspapers, while developing a network of representatives at an international level.

3.1.2. Scholarships

At European level, the Erasmus + programme has been an important tool to enhance the attractiveness of the EU as a destination for higher education. Besides EU nationals, citizens of many partner countries were eligible to receive support through this programme and participate in exchange programmes. In parallel to this, Member States also provided numerous opportunities for support at national level. Grants awarded to enable students to

34 AT, BE, CY, DE, EE, EL, ES, FI, FR, HR, HU, IE, LT, LU, LV, MT, NL, PL, PT, SE, SK, UK.

Incentives for attraction



Source: EMN NCP reports

study at university or college, including scholarships, were a widely used tool for attracting international students, offered in all Member States, at least to some extent.

In the majority of countries, scholarships were provided both by the state³⁵ and by individual HEIs.³⁶ The financial value of the different programmes varied considerably, both within and across Member States. Some covered the total amount of tuition fees (e.g. *Stipendium Hungaricum* Scholarship in Hungary). Others provided a fixed sum to cover tuition fees and study costs, plus living expenses (e.g. International Education Scholarships provided by the government of Ireland, amounting to 10 000 euros for one year of study) or a monthly stipend (e.g. Dora Plus, an Estonian Government scholarship programme available to international Master and PhD students, is worth € 350 and €1 100 respectively). In the case of around a third of Member States, scholarships were offered as part of bilateral agreements with third countries³⁷ or in the framework of international development cooperation policies.³⁸ 12 Member States have made available dedicated websites or online tools to facilitate the search for suitable scholarships from various state- and non-state actors.³⁹

In 16 Member States, private entities have also been identified as actors for attracting students in the context of scholarships, encompassing foundations or private companies.⁴⁰ Compared to those provided by state authorities and HEIs, these were usually much more focused and targeted at specific nationalities and/or study fields. For example, the 'Women in Business' scholarship in the Netherlands targeted talented females for enrolment into MBA programmes. Several Member States reported their participation in the Fulbright Commission scholarship programme, for example, Finland, Ireland and the United Kingdom, awarding grants to American citizens to take opportunities to study as international students in the receiving countries.⁴¹ In Austria, a social fund set up jointly by Huawei, an international telecommunications

solutions provider, the Vienna University of Technology and the Austrian Young Workers Movement, provided financial support for young students who left their home region to complete their studies.

3.1.3. Other (financial) incentives

In about half of the Member States, other financial incentives or financial support were in place to support international students, most commonly provided by the state⁴² and HEIs⁴³ and in some exceptional cases, also by private entities.⁴⁴ In Greece, applications for loans are done entirely privately with banks and other lenders and there is no active government guarantee scheme in place. In the case of HEIs, financial incentives included the exemption or reduction of tuition fees (see Section 3.2.2); for example, the University of Vienna in Austria refunded half of the tuition fees to international students able to demonstrate successful completion of 16 ECTS credits during the previous academic year. Furthermore, universities of applied sciences were also allowed to exempt students from developing countries from tuition fees. In some countries, at central level, international students were eligible for grants,⁴⁵ loans or study credits to support their studies,⁴⁶ however, this was often restricted to those with a long-term residence permit or those who had already lived in the Member State prior to their enrolment in the study programme, i.e. who did not possess a residence permit for the purpose of study. In Estonia, a needs-based study allowance was available, with the aim to assist students from lower income families and whose households were unable to support them; depending on the average income of the student and their family members, an allowance between € 75-220 per month was granted. In France, Italy and the Netherlands, housing benefits (a contribution from the government to the rental costs of housing) were available under certain conditions. As regards incentives offered by private entities such as banks, this usually entailed private loans.

35 AT, BE, CZ, DE, EE, ES, FR, HR, HU, IE, IT, LT (only for MA studies), LU, LV, MT, NL, PL, PT, SE, SK, UK.

36 AT, BE, CY, DE, EE, ES, FI, FR, HU, IE, IT, LT (only for MA studies), LU, LV, MT, NL, PL, SE, SK, UK.

37 BE, CZ, DE, ES, HR, IE, LV, LU, NL, SE, SK.

38 AT, BE, CZ, DE, IE, MT, PL, SE, SK, UK.

39 AT, BE, CZ, DE, FI, FR, HR, HU, NL, SE, SK, UK.

40 AT, BE, DE, EE, ES, FI, FR, HU, IE, IT, LU, LV, NL, PT, SK, UK.

41 It should be noted that the Fulbright Commission scholarship programme is partly funded by State as well as HEIs, private entities and donations.

42 BE, CZ, EE, ES, HU, IT, LU, NL, PL, SK, UK.

43 AT, BE, EE, HU, IT, LT, LU, SE, SK, UK.

44 EE, EL, ES, LU, UK.

45 Grants tend to be need-based and are usually available to students based on criteria such as family income.

46 DE, EE, LT, LU, PL, SK, UK.

3.1.4. English and other non-national language programmes

The availability of study programmes in English has been reported as another incentive for attracting international students in all Member States.⁴⁷ In 1 countries, specific programmes were also offered in other foreign languages, such as German, French or Russian.⁴⁸ Many Member States noted a significant increase in the number of English-language courses on offer in recent years, totalling 535 study programmes in Lithuania and over 800 programmes in Poland, for example. France noted a five-fold increase in the offer of English-language programmes, from 286 to 1 328 at the start of the 2018 university year. In Greece, all undergraduate programmes are taught in Greek, however, some post-graduate and master programmes are taught in English.

In eight Member States, government incentives were in place for HEIs providing courses in other languages. Such incentives were usually of a financial nature, either enabling HEI to charge (higher) tuition fees for programmes taught in foreign languages or providing the opportunity for receiving funding, often in the framework of EU financial instruments such as the European Social Fund.⁴⁹ For example, the Croatian Ministry of Science and Education concluded 30 contracts with HEIs to fund the development of study programmes in English, which was expected to contribute significantly to the internationalisation of higher education and the attraction of international students. Austria noted that the federal government stipulated related objectives in some of the performance agreements with public universities, defining for example an increased number of study programmes in a foreign language as one of the targets. Latvia noted that until 2018, many private HEIs offered programmes in Russian, however, legislative changes have now prohibited HEIs from providing programmes in non-EU official languages.

In Germany, expert opinion is divided about the rising number of modules and courses in English. On the one hand, a large range of courses in English makes German HEIs more attractive for international students and facilitates international networking and familiarises students with technical terms in their field, seeing that English is often used as a lingua franca. On the other hand, a lack of German language skills makes it more difficult for international students to integrate themselves into German society,

organise their lives on their own and find internships or student jobs or, later on, a regular job in Germany.

3.1.5. Family reunification and family support for international students

The possibility for international students to bring their family members to a Member State may also help to make an opportunity to study more attractive. While the Student and Researchers Directive ((EU) 2016/801) does not regulate family reunification for students, 17 Member States⁵⁰ were found to provide access to family reunification for students to varying degrees. In most cases, the standard conditions for family members of third-country nationals - notably, that the student was obliged to submit proof that s/he had sufficient and stable resources to support the family member(s) - applied. Sweden highlighted that international students frequently made use of the possibility to bring family members, with Swedish rules considered to be relatively family-friendly.⁵¹ In 2017, the Swedish Migration Agency granted 10 404 first-time residence permits for study purposes and 1 954 permits for their family members. In 11 out of the 17 Member States, family members had the right to work,⁵² although the conditions under which this was possible varied depending on the type of residence permit or visa. In Estonia, for example, spouses with a visa were subject to a (minimum) salary criterion, while those with a residence permit were exempted from this. Belgium, the Netherlands and Spain noted that their respective Labour Acts explicitly excluded family members of international students from the right to work in that capacity.

Specific support for spouses and other family members of international students was provided in seven Member States and usually entailed counselling services or access to childcare facilities.⁵³ In the United Kingdom, for example, many HEIs ran 'International Family Networks' to help family members to integrate and navigate visa application processes and arrange accommodation. Support sometimes included language classes and orientation programmes, and a few universities also provided housing to family members. In Finland, 'Student Housing Foundations' provided housing for students with families, whilst in Germany, family members were entitled to participate in integration courses.



3.2. ADMISSION CONDITIONS

The Students and Researchers Directive provided that third-country nationals must fulfil a number of general conditions related to the immigration procedure in order to be admitted to an EU Member State for the purpose of studying. Articles 7 and 11 of the Directive set out the conditions for the admission of a third-country national for study purposes. It should be noted that those Member States which did not opt into the Directive, such

as Ireland, have set out a number of conditions that must be met by non-EEA nationals applying for a visa/residence permission for the purposes of study, that are similar to those set out in the Directive. In addition to satisfying admission conditions for immigration purposes, third-country nationals were also required to meet programme requirements set out by HEIs, which were not covered by the Directive.

47 In Ireland and the United Kingdom, all courses were taught in English.

48 BG, CZ, DE, EE, HR, HU, LT, LU, NL, PT, SK.

49 CZ, EE (from 2020 onwards), ES, HU, HR, IT, LV, PL.

50 AT, BE, DE, EE, ES, FI, FR, HU, IE, IT, LV, NL, PL, PT, SE, SK, UK.

51 Family members can be admitted under the condition that they have a valid passport, that they have sufficient means to support themselves, and that they indeed plan to live together with their "sponsor", i.e. the international student. Residence permits for family members of international students are granted for the same time period as the sponsor's permit. If the sponsor's permit is valid for more than six months, the residence permit for the family member usually includes a work permit.

52 AT, DE, EE, FI, FR, IT, PL, PT, SE, SK, UK.

53 DE, EE, ES, PT, SE, SK, UK.

3.2.1. General admission conditions

Given that the majority of Member States which have opted into the Student and Researchers Directive ((EU) 2016/801) (see Section 2) transposed it, national practices with regard to admission conditions were generally harmonised. The main admission conditions included:

■ Proof of acceptance by an HEI

In accordance with Article 11(1)(a) of the Directive, the third-country national shall provide evidence that s/he has been accepted by an HEI to follow a course of study. In line with this, all Member States confirmed that such proof of acceptance was an admission condition within the immigration procedure. Despite not having opted into the Directive, this admission condition was in place in Ireland and the United Kingdom. It should be noted here that the procedure to register with an HEI is not covered by the Directive and remains outside the scope of EU law. At the same time, Germany noted that those still waiting for a letter of acceptance or having to take an entrance examination were able to apply for a student applicant visa. In this case, instead of the higher education admission certificate, applicants were required to provide their higher education entrance qualification and proof of their application or contact with HEIs.

■ Health insurance

Article 7(1)(c) of the Directive requires third-country nationals to present evidence of having sickness insurance. In all Member States except Belgium, international students were obliged to provide proof of health insurance as part of the immigration procedure and in the case of Germany also when submitting an application to the HEI. In the case of Belgium, international students automatically qualified for health insurance under national law. In Ireland, the same condition applied, while in the United Kingdom, international students were not obliged to have health insurance. However, they were expected to pay a health fee as part of their application process.

■ Knowledge of the language of the course

Article 11(1)(c) of the Directive leaves it at the discretion of each Member State to request proof of sufficient knowledge of the language of the study programme. Only Estonia and Germany (and visa-required non-EEA nationals in Ireland, which did not take part in the adoption of the Directive) required such proof in the framework of the immigration procedure; in Belgium, proof was only needed to support the visa/residence permit application in case the international student was enrolling in a private HEI. However, it should be noted that in all Member States, HEIs generally required proof of sufficient language skills as part of the enrolment procedure. Member States usually required language skills corresponding to CEFR level B2, although some deviations were possible depending on the course. An attestation often had to be submitted as proof,⁵⁴ although in some Member States only for specific HEI or courses.⁵⁵

■ Proof of sufficient resources to cover subsistence costs and study costs

All Member States required international students to provide proof of sufficient resources to cover subsistence costs and return travel costs in line with Article 7(1)(e) of the Directive, and most also applied the optional provision of Article 11(1)(d) of the Directive, meaning that proof of sufficient resources to cover the study costs was also needed.⁵⁶ This is also the case in Ireland and the United Kingdom, although Ireland noted that it was not set out explicitly in national policy that resources had to cover return travel costs. Member States generally determined the level of sufficient resources on an annual basis; against the background of fluctuations in living costs, this level varied greatly between Member States, ranging from approx. 200 euros/month in Poland and the Slovak Republic to approx. 1150 euros/month in Luxembourg and the United Kingdom. Evidence of sufficient resources was accepted in a variety of forms in most Member States, such as bank statements, a guarantee by a third person or a university, as well as scholarship statements. Six Member States also accepted work contracts as evidence.⁵⁷ Estonia pointed to its particular flexibility in this matter, accepting all proofs of legal income. Lithuania noted that the required amount of subsistence equals to 0.5 minimum monthly salary and a student must submit proof of the amount available for a year, irrespective of whether an application is lodged for the issue of a residence permit valid for one or two years.

■ Proof that fees charged by the Higher Education Institution have been paid

Article 11(1)(b) of the Directive provides Member States with the option of requesting evidence that the fees charged by HEIs have been paid. Evidence of payment of tuition fees was a common admission condition requested by the immigration authorities, with the exception of six Member States.⁵⁸ Austria, Latvia and Lithuania noted that while not an immigration admission condition, HEIs did request a proof of payment from international students prior to the commencement of the study programme.⁵⁹ Such a condition could be seen as unfavourable in terms of student attraction, particularly in Member States with relatively high tuition fees. For example, in Ireland, where fees were below 6 000 euros, the full amount of the fees had to be paid in advance of applying for a visa/residence permission. Where fees exceeded this amount then at least 6 000 euros had to be paid in advance, and the HEI was able to request payment of the amount in full before the student could attend the course. At the same time, Lithuania noted that the proof of payment of tuition fees in advance was used as a means to prove the authenticity of the student and thus mitigate concerns related to irregular migration. Here, Member States aim to balance policies to provide favourable conditions to attract international students whilst preventing the misuse of this migration channel.

54 BE, CZ, EE, EL, ES, FI, FR, IE, LT, LV, MT, NL, PT, SE, UK.

55 AT, FI, HU, IT, LU.

56 Except ES and HU.

57 BE, EE, EL, ES, LV, MT, PL.

58 BE, EE, ES, LU, NL, SK.

59 In Lithuania, in exceptional cases, nationals of certain priority countries (e.g. Belarus, Georgia and Ukraine) were exempted from this condition and were permitted to pay tuition fees per semester.

Box 7: DreamApply – Estonia

In 2011, Estonia launched an international student application management platform which serves also as a marketing management tool, offering paperless solutions to more than 200 education institutions spread across 25 countries. All Estonian HEIs are represented on the platform and most use it for receiving applications for admission from international students.

DreamApply supports admission procedures from the moment a potential applicant becomes interested in the institution until the student takes up his/her studies there. It can handle applications for full-time degree students or for short courses such as summer schools.

DreamApply saves a considerable amount of administrative time on the admission process, and provides HEIs with detailed information and statistics about admission processes. As a marketing management platform DreamApply also serves as a useful tool for HEIs to track potential candidates from the moment they become interested in studying in an HEI to the point of enrolment.

3.2.2. Tuition fees for international students

In most Member States, public HEIs were authorised (or required) to charge tuition fees to international students. The national practices of the Czech Republic, Germany, Greece and the Slovak Republic constituted noteworthy deviations here. In Germany, the decision to charge tuition fees lay with each of the German Länder, however, with the exception of Baden-Württemberg, none of the 15 other Länder currently asked for tuition fees, neither from EU nationals nor from third-country nationals. In Baden-Württemberg, the introduction of tuition fees was justified by the substantial increase in the number of international students in recent years, and by the fact that around 60% of students originated from countries which charged higher fees. In the Czech Republic, Estonia, Finland and Slovak Republic, international students did not have to pay tuition fees if they enrolled in a programme fully taught in the national language. In Greece, no fees were charged for undergraduate programmes but for postgraduate degrees, these were usually in place.

Around half of the Member States exempted specific groups of international students from payment of tuition fees, such as those that were economically or otherwise disadvantaged or disabled,⁶⁰ those that arrive under the umbrella of bilateral/multilateral agreements,⁶¹ and exchange students.⁶² In France, recipients of French government grants were exempt from tuition fees when enrolling in a programme that led to a national diploma. In Sweden, tuition fees did not apply to incoming doctoral students.

In general, public HEIs charged higher tuition fees for international students than for domestic or EU students. Exceptions here were the Czech Republic, Italy, Luxembourg and the Slovak Republic, where tuition fees were the same for all students. Around a third of Member States specified that medicine-related programmes were the most expensive ones.⁶³ In 10 Member States, tuition fees were capped, meaning there was a state-imposed upper limit on the fees public HEIs were able to charge international students.⁶⁴ In Finland, a lower threshold was in place, obliging HEIs to charge a minimum of € 1 500 .

Two main lines of reasoning were used by Member States as to why international students were charged higher fees. Firstly, some Member States noted that public HEIs did not receive subsidies for the education of international students from the state budget, as was usually the case for nationals and EU citizens.⁶⁵ Secondly, the costs incurred by HEIs in the reception of international students were often higher than for national students, for example due to orientation classes, targeted counselling services or language courses. Finland explained that charging higher tuition fees allowed for a higher quality of foreign-language programmes whilst in France, the differentiated strategy based on increased tuition fees for students from third countries (whilst increasing also the offer of grants and fee exemptions) was seen to contribute to outreach policies. In Germany, the Land Baden-Württemberg stipulated that the number of international students had increased significantly in recent years and that 60 % of the foreign students came from countries where tuition fee levels were comparable or considerably higher.

Member States reported different perceptions as to whether high or low fee levels constituted an attraction factor for international students. Whereas several Belgian universities observed that higher fees tended to attract students (the perception being that cheap education equals poor quality education), the Slovak Republic and Luxembourg considered its practice of charging the same fees for domestic and international students as a means to attract international students. In Sweden, the introduction of tuition fees (in 2011) reduced the number of incoming students, especially from low-income countries. The main argument to introduce tuition fees for “free-mover” students from third countries had been that there were not strong enough grounds to offer third-country students tax financed, free education, and that Swedish universities should compete with education institutions in other countries by offering high quality rather than free education. France put forward a similar argument when announcing the introduction of differentiated tuition fees for international students from the start of the 2019 university year. This new strategy, combining an increase in tuition fees, an improved welcome programme and the tripling of the grant programmes, aimed to attract more international students looking for quality teaching.

60 AT, DE, EE, HR (In HR, this includes international students who are beneficiaries of the aid for least-developed and low-income countries).

61 AT, BE, ES, FR, HR, IT, PT, SK.

62 DE, FR, SE.

63 EE, HU, IE, EE, LV, LT, MT, NL, SK.

64 AT, BE (French-speaking Community), BG, ES, FR (tuition fees are capped in the public HEIs that come under the Ministry of Higher Education. Tuition fees for the *Grandes Écoles* and private HEIs are set by the institutions themselves), IT, LU (only for secondary educational institutions offering educational programmes that award an advanced technician's certificate ('Brevet de technicien supérieur' – 'BTS')), MT, PT, SE, SK.

65 BE, ES, HR, UK.

Table 1: Range of tuition fees (in euros) for international students for enrolment in Bachelor (ISCED level 6) and Master (ISCED level 7) programmes in public HEI per academic year

Member State	Range of tuition fees (per academic year/euros) at public HEI	Same fees for domestic/EU students?
AT	1 453.44 (fixed amount) (BA and MA) ⁶⁶	No (no fees for domestic/EU students)
BE	935 – 6 000 (BA)	No (lower fees for domestic/EU students)
BG	3 000 – 7 000 (BA)	No (lower fees for domestic/EU students)
CY	6 834 (BA) 5 125 – 10 250 (MA)	For BA: no fees for domestic/EU students For MA: same fees for domestic/EU students
CZ	Range of tuition fees is in the order of thousands of euros (HEIs set by themselves). No fees for study programmes conducted in Czech	Yes
DE	No tuition fees (except in Baden-Württemberg: 3 000)	No (no fees for domestic/EU students)
EE	1 660 – 7 500 (BA and MA) Medicine: 11 000	No (lower fees for domestic/EU students)
EL	Dependant on programme; a percentage of international students are exempted from fees (BA) Dependant on programme (MA)	No (lower fees for domestic/EU students) – for MA programmes. No university fees for undergraduate programs, nor costs for subscription; course books are also provided free of charge.
ES	min. 1 081 (BA) min. 1 527 (MA)	No (lower fees for domestic/EU students)
FI	2 100 – 18 000 (BA and MA) No fees for study programmes conducted in Finnish	No (no fees for domestic/EU students)
FR	2 770 (BA), 3 770 (MA)	No (lower fees for domestic/EU students)
HR	620 – 4855 (BA and MA)	No (lower fees for domestic/EU students)
HU	3 200-16 000 (BA and MA)	No (lower fees for domestic/EU students)
IE	9 950 – 54 135 (BA) 4 000 – 48 000 (MA)	No (lower fees for domestic/EU students)
IT	900 – 4 000 (BA and MA)	Yes
LT	1 300 – 5 300 (BA) 2 300 –6 500 (MA) Medicine: 3 500 – 12 500	No (lower fees for domestic/EU students)
LU	800 (BA, first year) 400 (BA, second and third years) 400 (MA) 3 200 – 24 000 for specific programmes	Yes
LV	2 000 – 6 000 (BA and MA) Medicine: 7000-15000 (BA and MA)	No (lower fees for domestic/EU students)
MT	6 600 – 11 000 (BA and MA)	No (no fees for domestic/EU students)
NL	2 060 – 32 000 (BA and MA)	No (lower fees for domestic/EU students)
PL	2 000 – 3 000 (BA and MA)	No (no fees for domestic/EU students)
PT	max. 1 068 (BA and MA)	No (lower fees for domestic/EU students)
SE	approx. 7 700 – 28 900 (BA and MA)	No (no fees for domestic/EU students)
SK	max. 11 000 (for programmes conducted exclusively in a foreign language, otherwise no fees)	Yes
UK	11 400 – 43 400 (BA) 12 500 – 36 500 (MA)	No (lower fees for domestic/EU students)

Source: EMN NCP reports.

3.2.3. Administrative fees

Next to tuition fees, international students were charged administrative fees in most Member States, either as part of the immigration procedure and/or by HEIs. In terms of the former, the amount of fees varied

greatly between Member States. For the issuance of a student visa or residence permit, fees range from € 27.50 in Malta to € 300 in Finland. 12 Member States offered a fast-track application for visa/residence permits, which can be considered as a positive factor in terms of attractiveness.⁶⁷ At the same time, it should be noted that

⁶⁶ In the case of international students from specified third countries, public universities can refund € 363.36 per semester or waive the tuition fee entirely.

⁶⁷ CZ, ES, HR, IE, IT, LT, LV, MT, NL, PT, SK, UK.

the fee for such a fast-track procedure was often much higher. Nevertheless, Estonia and Finland, which do not provide a possibility for a fast-track procedure, stressed that processing times were generally very short.

In terms of administrative fees of HEIs, these were charged in addition to tuition fees in all Member States⁶⁸ and usually covered the costs for processing the

application and enrolment (see table 11 in the Annex for more information). However, the practices also varied widely across and within Member States, with the amount charged often at the discretion of the HEI. While fees in most Member States amounted to a maximum of € 300, these could be as high as € 1 500 in some HEI in Latvia and up to € 3 000 in Ireland.



3.3. HOSTING INTERNATIONAL STUDENTS

3.3.1. Nature of the document issued

In order to enter and stay in a Member State, international students must hold an authorisation (visa or residence permit); however, practices vary. In some Member States⁶⁹ international students were firstly required to apply for a long-stay visa in the third country, and upon their arrival in the Member State, then apply for or receive a residence permit. To obtain a Temporary Residence Permit for students in Austria, students must initially submit to the Austrian representation authority in a third country an application that is subsequently processed in Austria. Once a Temporary Residence Permit has been issued, the individual receives a visa for the granting of a residence title, allowing them to enter Austria and collect the Temporary Residence Permit. Similarly, in Luxembourg, international students must first apply in the third country for a temporary authorisation of stay. If the application is accepted, they need to apply for a long-stay visa (valid for three months) in order to travel to Luxembourg where they then have to apply for the residence permit. In the Czech Republic, international students can apply for both (a long-stay visa and long-term residence permit) depending on the purpose of the stay. In Germany, a visa for education purposes was granted for three months at least and 12 months at most and entitled students to enter and stay in Germany. After having entered the country, international students usually applied for a residence title to the local foreigners' authority. In Latvia, international students could be issued with a long-stay visa by the Latvian Embassy, but could also stay on the basis of a Schengen visa.

In seven Member States, there was no standard rule on whether the international student was required to apply for a long-stay visa.

- In Estonia, a residence permit may be applied for and issued in Estonia but entering the Member State must be done on the basis of a long-term visa, a short-term visa or visa free travel.
- In Ireland, only nationals of certain countries were required to apply for a long-stay visa in the third country and then apply for a residence permit in Ireland for a stay of longer than three months, while visa-exempt nationals applied and received the residence permit in the territory of the Member State. In Belgium,

international students were able to apply directly for the residence permit in Belgian territory if they were visa-exempt, if they already had a valid long-stay visa or if they were entitled to long-term residence in Belgium on other grounds than studying.

- In the Netherlands, international students were required to apply simultaneously for a long-stay visa (mvv) and a residence permit. The mvv visa with a three-month duration was issued in the third country before the issuance of the residence permit in the territory of the Member State; some nationalities were exempted from this requirement.
- In the Slovak Republic several visa/residence permit options exist for international students; they might apply for a temporary residence from abroad or in the Slovak Republic⁷⁰ or apply first for a long-term visa "D" (up to one year) and then apply for a temporary residence in the Member State.
- In Spain, international students were exempted from visa requirements and required only a residence permit;⁷¹ the residence permit for a stay of longer than 90 days could be applied for both in the third country and in Spain (for persons in a regular situation in the country). In Finland, applicants that were planning to stay more than 3 months submitted their application and received the residence permit in a Finnish diplomatic mission abroad. However, for exceptional cases, the residence permit could be issued directly in Finland if the applicant was already in the Member State.
- In Sweden, a long-stay visa could only be issued in rare, exceptional cases, if a person was granted a residence permit but could not receive his or her residence permit card before travel to Sweden. As a standard rule, residence permits must be applied for and granted before a third-country national arrived in Sweden. Applicants from countries that were not subject to visa requirements could obtain their residence permit card after their arrival in Sweden, but even in this case, the permit must have been applied for and granted before arrival.

In terms of the duration of these documents, the long-stay visa was usually valid for 3 to 12 months. Regarding the residence permit, in some Member States, this was valid for the exact duration of the studies,⁷² the duration of the studies plus additional months⁷³ or for one year⁷⁴

68 In EE, international students are exempted from the administrative fee if enrolled in an Estonian language programme in a public HEI.

69 BG, FR, HU, IT, LV, PL, PT, UK.

70 Students from visa free countries, students with legal residence in other Schengen states and some other special cases.

71 In Spain, for periods of less than 90 days, a visa will be required (if nationals from that country of origin need it to enter Schengen)

72 FR, SK.

73 NL (maximum 5 years).

74 AT, BE, CY, CZ (maximum one year), HU (at least one year), IE (for undergraduate students while for Master students the duration is 15 months), LU, LV, PT.

or two years⁷⁵ with the possibility of renewal. In Italy the residence permit for study cannot be renewed for more than three years beyond the duration of the multi-year course. In Estonia, the residence permit could have a duration of up to five years. In Poland, the first residence permit was granted for a period of up to 15 months, while the following permit for a period up to three years. In Sweden, the standard duration of the resident permit ranged from 6 to 13 months.

3.3.2. Processing times for visa/residence permit applications

In accordance with Article 34(1) of the Students and Researchers Directive, the competent authorities of the Member States shall decide on such applications and notify the applicant no later than 90 days from the application's submission. In practice, processing times for long-stay visas and residence permit applications for admission on the territory varied significantly among Member States. In nine Member States,⁷⁶ the residence permit applications were processed within approximately three months (90 days) while visa processes are usually shorter. Some countries offered the possibility for a fast-track decision on the residence permit application that was coupled with a higher fee (see Section 3.2.3). Bulgaria, Hungary and the Netherlands were processing applications in a comparatively short time: in Bulgaria and the Netherlands the residence permit was issued generally within two weeks and in Hungary the decision on the residence permit was taken within 15 days. In Spain and the Slovak Republic, decisions on resident permits were issued within a month while Estonia reported an average processing time of 40 days and the Czech Republic 51 days. A few Member States⁷⁷ reported no standard duration to process visa and residence permit applications; in these cases, processing times varied depending on each case or country of origin.

3.3.3. Renewal of a residence permit

All Member States offered the possibility to renew the residence permit. In Italy, renewal was possible only if the entry visa was for a multi-year course. 11 Member States⁷⁸ applied the same requirements as in the first application but in some of them, additional requirements such as proof of sufficient study progress or proof of continuation could be requested as well.⁷⁹ In a few Member States, the requirements to renew the resident permit were simpler and only entailed proof of sufficient

progress in the study programmes⁸⁰ and/or continuation of studies/(re-)enrolment in the HEI (confirming student status).⁸¹

3.3.4. Initiatives and measures upon arrival

Induction and orientation support

In all Member States, HEIs or the state provided induction and orientation support to international students, such as support to open a bank account or register in the healthcare system. In the majority of Member States,⁸² HEIs provided this support whilst in six Member States,⁸³ state-organised measures for such support were in place (in addition to the support from the HEIs).

Some of the most common initiatives for induction and orientation implemented by HEIs included orientation-induction weeks or days (or even dedicated sessions),⁸⁴ dedicated offices,⁸⁵ buddy or mentor support programme⁸⁶ or printed handbooks with relevant information.⁸⁷ These initiatives varied among and within Member States since they depended on the individual HEI. In Estonia, for example, HEIs offered a buddy programme through which Estonian students (buddies) helped international students to familiarise themselves with the new environment. In France, Paris-Saclay University has developed an "e-International Welcome Solution" application which enables third-country nationals (students, PhD students, researchers or interns) to obtain, in a few clicks, customised information and a stage by stage calendar indicating all the administrative procedures to be carried out before arrival and during the first few days in France. Regarding state-organised initiatives, in Hungary the HEIs that participated in the national scholarship programme "*Stipendium Hungaricum*" were obliged to provide such orientation and induction services. In Italy, through "Unitalia", international students were supported in issues related to administration or the university in general. An initiative in the Netherlands brought together various public and private actors during a consultation⁸⁸ aiming to remove administrative obstacles for international students through the dissemination of clear information on topics such as residence permits or students' finance.

Accommodation support

Accommodation support was provided in all Member States but Bulgaria and Greece.⁸⁹ Some Member States, such as the Netherlands, have experienced issues in relation to availability of student housing. In response to this, the National Action Plan for Student Housing was

75 AT (Third-country nationals, taking part in a Union or multilateral mobility programme or for whom an agreement between two higher education institutions is in place, are granted a residence permit valid for two years), DE (If the students take part in an EU or multilateral programme that comprises mobility measures or if their stay in Germany is based on an agreement between HEIs, the residence permit shall be issued for at least two years), ES (renewable annually, subject to meeting all requirements, passing all relevant tests or complying with the requirements for the continuity of their studies), FI (unless a shorter period of time is specified in the application), LT.

76 BE, CY, FI (maximum 90 days but the average in 2018 was 25 days), FR, HR, IE, IT, LT, PT.

77 DE, LU (for the visa and the student residence permit there is no maximum processing time, for the temporary authorisation of stay the maximum time to receive a response is 60 days), MT, SE (but the average in 2018 was 31 days).

78 AT, CZ, FI, FR, IT, LT, LU, MT, PL, PT, SE.

79 AT, BE, DE, FI, FR, IT, LU, SE.

80 CY, ES (including exam success), HU, IE, LV, NL, UK.

81 CY, EE, ES, HR, HU, IE, IT, SK.

82 AT, BE, CY, CZ, DE, EE, ES, FI, FR, HR, HU, IE, IT, LT, LU, LV, MT, NL, PL, PT, SE, SK, UK.

83 EE, FR, IT, NL, PL, UK.

84 BE, DE, EE, FI, FR, IE, LT, LU, LV, PL, SK, SE.

85 DE, ES, FR, HR, IE, IT, LT, LU, MT, NL, SE.

86 AT, BE, CZ, DE, EE, FI, FR, HR, HU, IE, LT, LU.

87 EE, FR, LT, LU, UK.

88 Red Carpet Consultation.

89 However, the "Study in Greece" platform offers information on finding housing and accommodation.

launched in 2018 to find a long-term solution for the shortage of student housing

Support in finding accommodation was mainly offered by the HEIs⁹⁰ but in some Member States⁹¹ there was additional support from other organisations such as NGOs or student unions. Four Member States⁹² offered state-organised or state-funded support in addition to that of the HEIs. In Italy, for instance, this was done by regional bodies for the right to university study (EDISU) present in the various universities and in the autonomous provinces. In Spain, state support included grants addressed to students (national or international) with families with income below a specified threshold. The Austrian Academic Exchange Service (OeAD) makes suitable accommodation available to OeAD scholarship holders and students and researchers from other countries. A French example of such support was the Lokaviz platform, the official student housing site of the student social services network, which held a list of all the available accommodation in the university residences in the regional centres for student social services (CROUS) as well as offers in the private rented sector across France. As part of the new attractiveness strategy for international students, announced in 2018, this platform was to be translated into English, to facilitate access by non-French speaking students.

The type of support varied across the Member States but in most cases, HEIs were providing support to find a room and relevant information (for example on real estate companies) while some HEIs offered accommodation in dedicated dormitories or residencies (usually for a limited time). This support was provided at an institutional level and therefore varied among HEIs.

In eight Member States, other organisations complemented HEIs' support of international students in accommodation.⁹³ For example, in Belgium, some non-profit organisations offered accommodation at affordable prices to students from developing countries. In Estonia, the International House of Estonia supported international students in finding real estate offices that provided information in English. .

Preparatory courses

The majority of Member States foresaw the provision of preparatory courses for international students. The only exceptions were Luxembourg and Latvia. In Latvia, the law did not allow students from third countries to follow preparatory courses; they were permitted to follow only full-time studies. However, HEIs offered the opportunity to attend language and culture courses during the period of studies.

HEIs in Member States were the main actors in providing preparatory courses. Language courses were the most common type of preparatory course. In France, Greece, Ireland, Portugal, the Netherlands, Spain, the Slovak Republic and the United Kingdom, (multi)cultural or intercultural awareness activities and courses were also in place.

In a few Member States,⁹⁴ other organisations were active in providing such preparatory courses. In the Czech Republic, Integration Centres operated at a regional level and usually cooperated with the HEIs to carry out various activities such as language courses and cultural courses, and provide relevant legal and administrative information aiming at the best possible integration of international students. The state was involved in providing such courses only in three Member States.⁹⁵



3.4. RIGHTS OF INTERNATIONAL STUDENTS

At EU level, the right to work for international students is regulated by the Students and Researchers Directive. Article 24 provides that international students are entitled to perform economic activities as employees for a minimum of 15 hours per week or the equivalent in days or months per year. Member States have the discretion to grant students the right to exercise self-employment activity.

In line with the Directive, all Member States, apart from Ireland and the United Kingdom, countries that do not take part in the Directive, allowed all categories of international students to work for at least 15 hours/week during the academic year. During vacation periods or official school holidays, a few Member States allowed international students to work more hours than during the academic year⁹⁶ or, in some cases, they removed any restriction related to the hours of work per week⁹⁷. Six Member States⁹⁸ had no restrictions in place with regards

to the hours that international students were allowed to work per week.

In Ireland and the United Kingdom, some categories of international students were subject to different regulations. Specifically, in Ireland, international students that attended courses not included in the Interim List of Eligible Programmes were not permitted to work. International students attending a full-time course of study that was included in the aforementioned list could work up to 20 hours per week during the academic year and up to 40 hours per week during college holidays. In the United Kingdom, an international student was allowed to work 10 hours per week if s/he was following a course that was below degree level at an HEI, and 20 hours per week during term in other cases.

Five Member States⁹⁹ had restrictions in place concerning the type and the field of work in which international

90 AT, BE, CZ, CY, DE, EE, ES, FI, FR, HR, HU, IE, IT, LT, LU, LV, MT, NL, PL, PT, SE, SK, UK.

91 BE, CZ, DE, EE, FI, LU, NL, PT, UK.

92 AT, ES, FR, IT.

93 BE, CZ, EE, FI, LU, NL, PT, UK.

94 CZ, DE, NL, PT, SK, UK.

95 CZ, EE, PL.

96 DE, IE, HU.

97 BE, BG, FI, LT, LU, NL, UK.

98 DE, EE, ES (duration limits are applied in case of full-time work contracts or full-time self-activities in which their duration cannot exceed 3 months or must coincide with the study period) PL, PT, SE.

99 CY, HR, MT (related to international students studying English or MQF level 1-4 students with a course duration of more than 90 days and in possession of a type D visa), SK, UK.

students were allowed to work. For example, to work in Cyprus, international students had to be full-time students, having completed at least six months of studies and were restricted to work in specific fields. A number of Member States required international students to obtain prior authorisation for the right to work in accordance with national law.¹⁰⁰ In Cyprus the reasoning behind this was related to labour market control. In Croatia, international exchange students work in Croatia through the so-called Student Employment Centres at HEIs, which leads to the benefit that the employer pays a very low-income tax.

Regarding the right to exercise self-employed economic activity, all but eight Member States¹⁰¹ allowed international students such access. In most of these Member States,¹⁰² the same rules were applied as when the student was regularly employed, or there was no need for a special permission.¹⁰³ However, four Member States¹⁰⁴ required prior authorisation.

Many Member States allowed international students to carry out a training or job in parallel to their studies¹⁰⁵ or even to defer their studies¹⁰⁶ for this purpose. In three Member States¹⁰⁷, international students had the right to do both. However, in the Czech Republic when an international student wished to defer his/her studies, s/he lost the student status and was obliged to temporarily leave the country or obtain a different type of residence permit. In all other cases, the student status remained unchanged. In a few Member States, international students were able to carry out training¹⁰⁸ or internship/ work placement¹⁰⁹ in the framework of their studies. In Greece, currently, students have the right to carry out a job in parallel to their studies on a part-time basis.

With few exceptions,¹¹⁰ international students were obliged to complete their studies within a maximum time period. In some Member States there was a specific maximum duration of studies that varied from one to seven years but in principle, this depended on the type of

degree, the topic of the study programme or the European Credit Transfer and Accumulation System (ECTS). In Cyprus, students must complete their studies within the duration of the programme plus 50 % of this duration. In Croatia, HEIs defined the duration of the period of study; if studies were not completed within that period, students lost their student status.

In accordance with Article 21(3) of the Students and Researchers Directive, Member States may withdraw a visa or residence permit in case of a lack of progress in the relevant studies. 14 Member States¹¹¹ have transposed this provision. While the EU provision is not directly implemented in Austria, the authorities may refuse to renew a Temporary Residence Permit if the student fails to demonstrate progress. Similarly, even though Ireland and the United Kingdom did not opt into the Directive, lack of progress could also have negative implications on the residence permit of an international student; in the UK HEIs could end the sponsorship of a student that was not progressing academically, while in Ireland, permission to reside on the territory as a student could be withdrawn if the student was not / no longer in compliance with the conditions of their residence permission, including failure to provide evidence of academic progression.

In most Member States, the number of years for which an international student possessed a residence permit for study purposes counted towards being granted access to long-term residence¹¹² or citizenship¹¹³. In general, half of the period of stay in the Member State on the grounds of a temporary residence permit for the purposes of study was taken into account when calculating the required period for long-term residence. In Lithuania, students who have completed studies and have acquired higher education qualifications in Lithuania are entitled to count the whole period of their studies for long-term residence. In Sweden, only students at a doctoral level were entitled to count the period with a temporary residence permit towards obtaining a permanent one.



3.5. EXTERNAL FACTORS AFFECTING THE ATTRACTION OF INTERNATIONAL STUDENTS

Several external factors affected Member States' attractiveness to international students. Research on these external factors undertaken in a small number of Member States revealed that the high ranking of universities internationally¹¹⁴ as well as the availability of programmes taught in English¹¹⁵ were important factors for international students. A 2017 "International students' barometer" carried out in Finland, for example, found

that the content of education, the quality of research and costs, alongside HEIs' reputation, were the factors that played an important role in attracting international students to Finland. In France, the survey by Campus France and Kantar Sofres revealed that the quality of the education remained at the top of the criteria for choosing France, but the cultural interest and knowledge of French language played an important role as well. Favourable

100 CY, ES, HR, MT, NL, PL (This is the case for part-time students and third-country nationals from Armenia, Belarus, Georgia, Moldova, Russia, Ukraine are exempted), PT.

101 BG, CY, DE, FR, IE, LU, MT, UK.

102 CZ, EE, ES, FI, HU, IT, LT, LV, NL, PL, SE, SK.

103 in Italy, however, for work services exceeding 1 040 hours per year, the residence permit for study must be converted into a residence permit for work (self-employed or subordinate) under the decree governing the flow of immigrants)

104 BE, DE, ES, PT.

105 AT (as long as the employment does not interfere with the main purpose of stay, in this case to study) BE, CY, DE, EL, ES, FI, FR, HU, IE, IT, NL, PL, PT, SK.

106 HR, MT.

107 CZ, EE, SE.

108 AT, DE, ES, FI, LU (In Luxembourg this training shall be unremunerated), LV.

109 AT, DE (if it constitutes obligatory part of the course of study), ES, FI, LT (if it constitutes obligatory part of the studies), IE, SE, UK.

110 DE, BG, CZ, FR (however, when renewing the residence permit, the Prefect verifies the real and serious nature of the studies and notably the number of repeated years, changes in orientation, etc.), HU, LT, PL, PT.

111 BE, CY, DE, EE, FI, FR, HR, IT, LU, LV, MT, NL, SE, SK.

112 AT, BE, CZ, CY, DE, EE, ES, HR, HU, IT, LT, LV, NL (in some cases), PL, PT, SK, UK.

113 AT, CY, DE, FI, FR, LT, LU, NL (in some cases).

114 DE, FI, FR (for certain student profiles, in particular for students enrolled in fields of excellence), IE, NL, SE, UK.

115 DE, ES, FR (depending on the profile and language of the student), IE, NL, SE, UK.

market conditions, low tuition fees and low living costs in Germany were additional factors that attracted international students in Germany. In Ireland, research commissioned by the Irish Higher Education Authority (HEA) found that international students were attracted to Irish HEIs due to the institutional reputation, research quality, reasonable costs of living and tuition fees, social life and English-taught courses. Another factor of importance was that some countries, notably Estonia, Germany, the Netherlands, Sweden and the United Kingdom, were

considered innovative countries and as “hubs” for certain fields of study. In addition, societal factors were also found to impact the attractiveness in these Member States; all five were regarded as open and safe societies. In Greece, currently, culture, socio-economic factors, and the language in which courses are offered are crucial factors affecting the attraction of international students. Living cost and free education are also important factor, as described in experiences of international students.



3.6. CHALLENGES IN ATTRACTING INTERNATIONAL STUDENTS

Challenges relating to attracting international students were highlighted by almost all Member States. Some Member States pointed out that a major challenge for HEIs was the limited availability of courses taught in foreign languages, especially in English that could attract further international students.¹¹⁶ Another challenge reported by some Member States¹¹⁷ concerned insufficient representation in third countries: in cases where Member States’ networks of diplomatic missions abroad were small, the application process for a visa or residence permit could be quite lengthy.

Furthermore, the success in attracting an increasing number of international students gave rise to new challenges in some Member States. On the one hand, some Member States encountered problems related to housing and accommodation, undermining an important incentive for international students to choose a Member States for study.¹¹⁸ The Netherlands, for example, was reported to be facing a substantial housing shortage, while in France, Hungary, Ireland, Luxembourg, Malta and Sweden, problems mostly related more generally to the lack of affordable housing. In Germany, a new study showed¹¹⁹ that although there was also a housing shortage especially in metropolitan regions in Germany, some HEI locations saw the attraction of international students also as a strategy to tackle the demographic change (lower birth rates and emigration of the domestic population from the region) and a declining number of domestic students enrolling at the HEIs

On the other hand, HEIs encountered challenges related to the funding and capacity of the higher education sector. HEIs have had to adapt swiftly to the increasing number of students and to ensure adequate infrastructure and sufficient (staffing) capacity. In Ireland and the Netherlands for example, state funding allocations to the higher education sector had not increased proportionally to the significant growth in students (both EEA and non-EEA) attending HEIs. The Hungarian government and HEIs initiated various projects over the past years for the reconstruction and development of educational infrastructure. Universities in the Netherlands faced problems

with regards to managing student influxes and having sufficient staff at the universities.

Additionally, Spain reported inadequate internationalisation risk management that led to lower education quality; this related to the challenge of attracting international students without jeopardising the quality of the studies. In Sweden, it was argued that even though the quality of Swedish research and higher education was considered high, Swedish higher education institutions were not very visible in foreign countries. Further common challenges mentioned by Member States included the lengthy processing times of applications for visas and residence permits,¹²⁰ weak promotion of the national educational system,¹²¹ and a general lack of knowledge among international students about the Member State and the opportunities offered.¹²² Some Member States provided information on other challenges concerning residence permits, apart from processing times. For example, Sweden reported that although the vast majority of incoming applications for residence permits were successful, fulfilling the requirements for a permit to be granted was not always easy; a particular challenge for some prospective students was to prove that they had secured sufficient financial resources for their stay in Sweden.

In Greece, a recent study identified that insufficient levels of promotion of HEIs may impact internationalisation of higher education.¹²³ Promoting the visibility of Greek HEIs abroad, using innovation and new technologies as well as optimisation of procedures for the enrolment of foreign students, such as the rapid issuance of visas and the facilitation of opening bank accounts have been identified as key actions to increase attractiveness.

116 DE, EL, HR, FI, FR, IT, LU, PL, PT, SK.

117 DE, FI, LT, LV, MT.

118 EL, FR, IE, HU, NL, MT, SE.

119 SVR - Sachverständigenrat deutscher Stiftungen für Integration und Migration (2019): Dem demografischen Wandel entgegen. Wie schrumpfende Hochschulstandorte internationale Studierende gewinnen und halten. Studie des SVR-Forschungsbereichs 2019-1, Berlin: SVR.

120 AT, CZ, DE, IE, LV, PL, SE, SK.

121 IT, LU, SK.

122 FI, LT, LU, MT.

123 Enhancing internationalisation in higher education: Guide of procedures and tools – proposals https://gear.minedu.gov.gr/wp-content/uploads/2018/05/Guide_procedures_tools_proposals_EN.pdf

4. RETENTION OF INTERNATIONAL GRADUATES

This section examines the policies and practices in place in Member States for retaining international graduates,

including the measures to encourage them to stay and seek employment following completion of studies.



4.1. POSSIBILITY TO STAY IN THE MEMBER STATE AFTER COMPLETION OF STUDIES

Article 25(1) of the Students and Researchers Directive stipulates that after the completion of studies, students should have the possibility to stay in the Member State for a period of at least nine months in order to seek employment or set up a business. The majority of Member States provided for a residence permit for the purpose of seeking employment or self-employment/starting up a business after completion of studies.¹²⁴ Such permits are typically not renewable (i.e. issued only once) and vary across Member States in terms of duration from 6 months¹²⁵, 9 months¹²⁶, 12 months¹²⁷ to 18 months.¹²⁸ In Ireland, international graduates under the Third Level Graduate Programme can remain for the purpose of seeking employment up to 12 months for students graduating with an honours bachelor degree and up to 24 months graduating with a master's degree or higher. In Estonia, graduates may also stay without applying for a specific permission; after finding employment graduates must then apply for a residence permit for work.

Box 8: Welcoming PhD graduates in Estonia

Third-country nationals who have completed a PhD from any country may be granted temporary residence permit for settling permanently in Estonia (validity up to five years, renewable for up to 10 years at a time) if they fulfil the conditions of the issue of such permit (e.g. PhD degree is confirmed by the ENIC-NARIC; the actual place of residence is Estonia; sufficient legal income; medical expenses insurance contract). After five years of stay in Estonia with a temporary residence permit for settling permanently in Estonia, a PhD graduate qualifies for a residence permit for long-term (permanent) residents. The latter permit gives better opportunities for migrating to and working in other EU Member States, and is a track to Estonian citizenship.

However, an additional condition - Estonian language proficiency at least at the elementary level (B1) - has to first be obtained.

In some Member States,¹²⁹ issuing such a residence permit required that the applicant had proof of secure means of (financial) support. In some Member States,¹³⁰ the special permit was only valid for the purpose of job search/self-employment and did not entitle the third-country national graduate to work. Therefore, after finding employment, s/he was obliged to apply again for a new permit on the grounds of employment. In other Member States (e.g. France, the Netherlands, Slovak Republic (10 hours per week) and Sweden), the graduate was allowed to work under the special permit for job-search/self-employment. In Italy, the residence permit for study can be converted into a work permit by acquiring one "quota" under the annual decree for entry flows. International graduates in the Czech Republic and Estonia were able to enter the labour market without the need for any

124 AT, BG, CZ, DE, ES, FI, FR, HU, IE, LT, LU, LV, NL, PL, PT, SE, SK.

125 SE (prior to implementation of the new Students and Researchers Directive).

126 BG, CZ, EE (270 days), HU, LV, LU, SK.

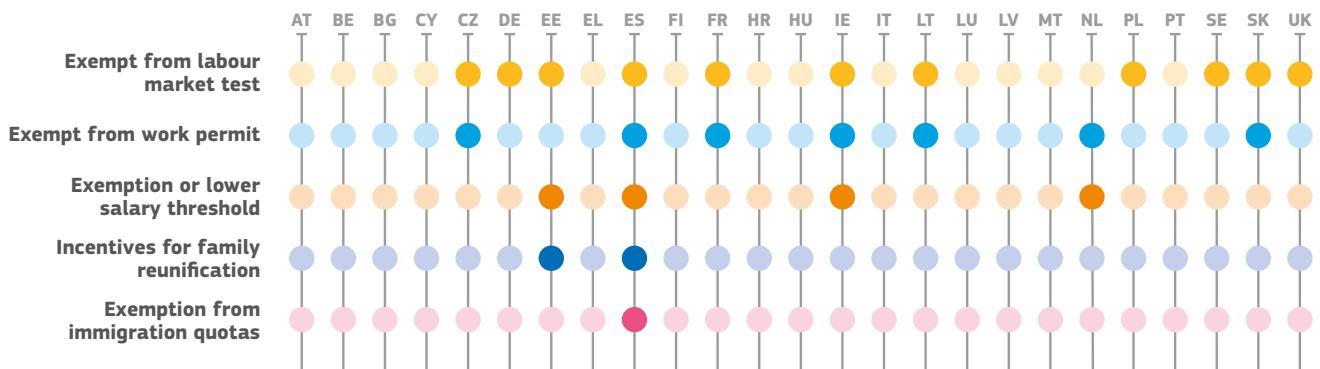
127 AT, ES, FI, FR, HR, LT, NL, PL, PT.

128 DE.

129 e.g. AT, ES, FI, LU, LV, SE, SK.

130 e.g. AT, ES, FI, HU, LT, LU, LV.

Incentives for retention



Source: EMN NCP reports

permission, but were required to hold a valid residence permit. In Bulgaria, Estonia and Portugal, international graduates were entitled to mediation services provided by the Public Employment Services (PES).

Box 9: Orientation year - the Netherlands

In the Netherlands, an application for the residence permit 'orientation year' can be filed up to three years after attaining a diploma. The scheme allows international graduates to choose whether they want to start their orientation year immediately after graduation or later. The international graduate can, for example, first return to his/her country of origin for a certain period and return to the Netherlands within three years to seek a job. Furthermore, the international graduate can apply for a new orientation year if after the first orientation year a new study programme or research has been completed.

However, in other Member States, there was no specific policy for international students to seek a job or set up a business:

- In Belgium, Cyprus and Greece, at the time of the study the Directive had not been transposed and no possibility was in place for international students to stay after their studies in order to seek employment or set up a business;
- In Malta, although the Directive had been transposed, there were no specific policies in place and authorisation to stay was dependent on whether the competent authorities extended the period of stay.

In some Member States, students were able to remain on the territory for additional time after completing the expected study period without a job-seeking permit, for example, in Latvia (four months; Slovak Republic (30 days); and the United Kingdom (up to four months) and Lithuania (three months). During this time students were able to apply for another residence permit e.g. for employment or self-employment purposes.



4.2. POLICY MEASURES AND INCENTIVES TO RETAIN INTERNATIONAL STUDENTS

Whilst 12 Member States¹³¹ did not have any targeted policy measures or incentives in place to retain international students, other Member States were found to have adopted specific measures. The most frequently adopted measure was the exemption from the labour market test for international graduates.¹³² In a number of Member States, international graduates were also exempt from having to obtain a work permit.¹³³ Another exemption was from salary thresholds, or a lowered salary threshold, where such minimum thresholds applied.¹³⁴ In Estonia, international graduates were exempted from immigration quotas and this exemption also applied if the third-country national left and then returned to Estonia to apply for a new residence permit. International graduates

who have completed their studies in Lithuania, and apply for a residence permit to work there are not subject to the requirement to possess a 1-year work experience if s/he intends to take up employment in a qualification-related occupation. Finally, incentives for family reunification were in place in Estonia and Spain. In Estonia, the International House developed an International Spouse Career Counselling Service to promote the attraction and retention of foreign specialists. In Estonia and Spain, family members were allowed to apply simultaneously or successively for the residence permit and they were also allowed to work.

In the majority of Member States, there were no restrictions regarding the job field in which the international student was able to seek employment or to set up a business.

¹³¹ AT, BE, BG, CY, EL, HR, HU, IT, LU, LV, MT, PT.

¹³² CZ, DE, EE, ES (depending on the type of work), FI, FR (if there is consistency between the diploma and employment with remuneration at a level set by Council of State decree), IE, LT (for a qualification-related occupation), PL, SK, SE, UK.

¹³³ CZ, ES (depending on the type of work) IE (for the duration of time spent in Ireland under the Third Level Graduate Programme), FR, LT, SK.

¹³⁴ EE, ES, IE, NL.

However, in some Member States international students were restricted to employment related to the studies they had undertaken¹³⁵. In Germany, there was no restriction during the 18-month period in which graduates could seek employment; however, after this period of time their employment needed to be related to the studies they had undertaken in order to receive a residence permit for remunerated activities. In some Member States¹³⁶ a minimum salary threshold was required to obtain a residence title allowing international graduates to take up employment. In Austria they had to receive a specified minimum level of remuneration, based on the monthly gross minimum salary for Austrian graduates (entry-level professionals). In

the United Kingdom, a salary threshold of a minimum of £20 800 was in place, though for some occupations, the minimum salary threshold was higher than this, and the employer had to be registered as a sponsor with the UK Home Office. In most Member States, due to a focus on highly skilled recruitment, the international student should have completed a Bachelor's degree or above (minimum level 6 of ISCED) in order to seek employment or to set up a business, while in France, and Luxembourg, the minimum level of qualification was a Master's degree (minimum level 7 of ISCED) and also a Professional Bachelor's degree in France. In Austria the intended employment had to correspond to the person's level of education.¹³⁷



4.3. INITIATIVES OF HEIS AND PRIVATE SECTOR

In the majority of Member States,¹³⁸ HEIs and the private sector were active in implementing initiatives and measures to retain international graduates. However, individual HEIs implemented different initiatives and thus, the scale and scope of initiatives varied across the HEIs within the Member States. In a number of Member States, HEIs set up career centres to provide advice and counselling to students and in many cases assisted with finding internships and employment.¹³⁹ In Germany, local employment agencies often provided special counselling services for higher education graduates. In some cases, they even offered targeted advice to international students by specially trained counsellors or established co-operation with the higher education career services.

for example offered free appointments with an immigration solicitor on campus once a month.¹⁴⁰ Another common form of support provided by HEIs to students was organising job fairs.¹⁴¹ In Greece, the private sector provided support to students allowing the completion of their studies, for example via the provision of counselling, the implementation of internship programmes and the organisation of career forums.

Box 10: International Spouse Career Counselling Service' - Estonia

Since Autumn 2018, International House in Estonia provides spouses and partners of international specialists working in Estonia the 'International Spouse Career Counselling Service' to help people in this situation adapt to the change and make informed choices in order to start or continue education and working life in Estonia. Enterprise Estonia staff working to recruit talent from third countries, understood that the gain from successfully attracting international talent was very limited if the workers did not remain in the country in the long-term. This was often due to the fact that their partners became isolated and had no professional prospects themselves in Estonia.

In the Netherlands and the Slovak Republic, some HEIs created a specialised portal for graduates where they published job offers in relevant fields. In the vast majority of cases, such services were not specifically tailored to third-country nationals but were available to all students of the HEIs. In the United Kingdom, some HEIs provided free legal advice to international students to discuss their options post-study; the University of Manchester

Box 11: The power of networking: Alumni network in France

The France Alumni network¹⁴² coordinated by Campus France, is the global network for graduates from French higher education. The France Alumni platform was launched in 2014, with the aim of maintaining ties between France and people educated in France. The on-line platform offers a range of services: professional opportunities, advice to promote the French path, alumni portraits, etc. The representatives of France Alumni worldwide regularly organise events and other opportunities for the alumni present in other countries to meet up.

Networks have been launched in 105 countries, and include almost 265 000 members, and over 3 000 partners (voluntary, free membership). 750 higher education and training institutions have joined the France Alumni network, both in France and abroad.

The aim is to build on these networks in terms of influence, and notably economic diplomacy, as highlighted in the example of the **France Alumni Ambassadors network in the USA** which was created to promote French higher education in American institutions. An **on-line mapping¹⁴³** lists all the France Alumni Ambassadors in the country. It has over 700 voluntary ambassadors in the USA. The long-term aim is to create a world network of ambassadors to serve as relays in different areas with the French embassies abroad.

135 ES (no limit to set up a business), LU, PT.

136 AT, UK.

137 The criteria for ascertaining whether employment corresponds to a person's level of education are not defined in any provision of law in Austria. This situation leads to the refusal of key workers in practice, according to a representative of the Austrian National Union of Students.

138 AT, CZ, DE, EE, EL, ES, FI, FR, HR, HU, IE, IT, LT, LU, LV, NL, PT, SE, SK, UK.

139 AT, CZ, DE, EE, ES, HR, HU, FI, FR, IE, IT, LT, LU, LV, NL, SE, SK, UK.

140 <http://www.careers.manchester.ac.uk/international/ukworkafterstudy/>

141 EE, ES, HU, NL, PT, SK.

142 <https://www.francealumni.fr/en/>

143 <https://www.francealumni.fr/en/position/usa/page/21298/become-a-france-alumni-ambassadeur>

Some HEIs collaborated with companies to facilitate job-seeking for international students.¹⁴⁴ For example, in Estonia, the Estonian Employers' Confederation organised days when foreign students studying in Estonian HEIs could shadow employees from a variety of companies operating in Estonia that have provided significant support for the work practice of foreign students. In Sweden, HEIs had alumni programmes including mentorship programmes, which could help students to establish networks and contacts to employers

Box 12: Encouraging employers to offer internship and employment opportunities to foreign students – Estonia

The 'International Marketing Strategy of Estonian Higher Education 2015-2020' commissioned by the Ministry of Education and Research has a section 'Internship and employment opportunities for foreign students'. This states that actions will be directed towards employers to raise their awareness of the conditions of offering employment or internship opportunities to foreign students and the potential benefits thereof; publicly recognising the employers that offer the best internships to foreign students, and encouraging employers' mutual exchange of best practice.

These actions are being implemented in cooperation with Enterprise Estonia, the Estonian Employers Confederation, the Estonian Chamber of Commerce and Industry and other employers' organisations. The aim is to foster foreign students' awareness about work and internship opportunities, encourage foreign students and employers to make contact and to contribute to the

implementation of the action plan of Work in Estonia. During the autumn of 2018, Study in Estonia organised, together with Work in Estonia and Estonian universities, several career fairs for students to help them to find internship positions or jobs.

With regard to establishing a start-up, in Spain, there were a number of HEI initiatives in collaboration with the private sector on entrepreneurship, start-up incubation, employability, etc. For example, the Programme "Rising Startup Spain" among other benefits provided prize money of € 10 000 to cover initial start-up expenses. The University of Luxembourg also had an incubator to facilitate the start-up creation process by offering several services to students such as office spaces, access to a full infrastructure at low costs, administrative support, mentoring, access to a business network and organisation of events.

In Germany, a new approach was recently tried out which has shown positive results. The Federal Office for Migration and Refugees supported the model project 'Students meet Society' at the Martin Luther University Halle-Wittenberg, which aimed to place international students in voluntary work positions at the HEI's location and to support better opportunities for social participation and integration during their studies and thus also to improve academic success and awaken or strengthen the desire to stay. The promotion and successful placement of international students in a field of engagement (e.g. voluntary or community work) had increasingly been regarded in Germany as an important factor for societal participation and as a tool for strengthening retention and the prospect for stay.



4.4. CHALLENGES

A number of challenges in retaining international graduates were identified by Member States. One of the main challenges was that international students often did not have the necessary level of language skills of the national language(s) to enter the labour market after graduation, especially where English language study programmes were widely on offer.¹⁴⁵ For example, Germany also noted that expert opinion was divided about the rising numbers of English-language programmes. While making German HEIs more attractive for international students, a negative consequence was that it provided fewer incentives to international students to learn the national language well enough to seamlessly enter the job market following graduation.¹⁴⁶ This could potentially counteract international student retention.

Another main challenge identified was the competitiveness of the conditions offered on the labour market and the living standards available to graduates.¹⁴⁷ In Hungary, for example, salary levels offered were not seen as sufficiently attractive when compared to some other European countries. Similarly, in Poland, a higher salary available in other Member States was often a decisive factor for university graduates in Poland to leave the country following

graduation. Related to this, a high national unemployment rate and unfavourable economic situation was identified by both Croatia and Italy as a challenge to the retention of international graduates. One of the challenges mentioned by the students in Lithuania was low opportunities to undertake internship placements in foreign languages and integrate into the labour market.

Further challenges identified included cost of living, particularly related to finding affordable housing (in Ireland, Luxembourg and Sweden); restrictive immigration systems (in Austria and Belgium); long processing times for applications (France) or extensions of permits (Ireland and Sweden); difficulties due to change of status procedures (France); minimum salary thresholds (Austria and Ireland,) and students' lack of professional networks (Sweden). In Germany, international students have repeatedly said in surveys that they would like to get more support from the HEIs or support which is tailored to their needs.

144 DE, EE, ES, FI, FR, LU, LV, NL, SE, SK, UK.

145 AT, DE, EE, FI, IT, LT, LU, NL, SE.

146 SVR - Sachverständigenrat deutscher Stiftungen für Integration und Migration (2017a): Allein durch den Hochschuldenschwungel. Hürden zum Studienerfolg für internationale Studierende und Studierende mit Migrationshintergrund. Studie des SVR-Forschungsbereichs 2017-2, Berlin: SVR.

147 CZ, HU, LT, PL.

5. BILATERAL AND MULTILATERAL COOPERATION WITH THIRD COUNTRIES

The majority of the Member States¹⁴⁸ included in the study reported that they had bilateral and/or multilateral agreements in place. Only Belgium, Cyprus and Finland indicated that they did not have such agreements currently in place. In Belgium and Finland education for third-country nationals was realised through development cooperation but student mobility was not the core element of this cooperation.

Those Member States that had bilateral or multilateral agreements in place often concluded these agreements with both industrialised countries as well as developing countries. The majority of these agreements aimed at exchanging experiences and practices, teachers, students and researchers, as well as the establishment of fellowships.

Cooperation with industrialised countries often involved countries from North America and South-East Asia, while bilateral agreements with developing countries often formed part of a broader development cooperation between the Member State and the third country.

Box 13: Good practice example from Italy

The Ministry of Education, University and Research (*Ministero dell'Istruzione, dell'Università e della Ricerca* - MIUR) launched on 10 May 2018 the call for proposals "Constitution of Italian University Networks to implement cooperation agreements between Italian Universities and those of the Member States of the Organisation of Islamic Cooperation (OIC)". The competition aimed to promote university and post-graduate training projects between Italy and the OIC Member States, in line with the principles of the Strategy for the Promotion Abroad of Italian Higher Education 2017/2020. Project proposals were expected to cover at least one of the following topics and programmes:

- encouraging the establishment of university networks;
- organising training courses in Italy;
- promoting academic and student mobility;
- encouraging the development of joint courses in strategic areas of reference;
- supporting the training of managers in the intervention countries in order to contribute to the strengthening of bilateral ties in all sectors - political, economic, scientific, technological and cultural;
- facilitating synergy through direct actions that support the internationalisation of the country's economic and productive system; and
- strengthening the bond with companies, by offering training courses to international students.

Regarding the characteristics of the agreement, no trends were identified in relation to specific age groups, gender or other socio-demographic characteristics. Bilateral agreements also usually covered all qualification levels, but some Member States specifically used them to increase the number of PhD students e.g. Luxembourg, Poland.

The Member States included in the study were also found to be relatively flexible in relation to the specific fields of study promoted through cooperation agreements. However, engineering was identified as a preferred field in Hungary, Italy, Malta and Sweden.



5.1. MEASURES TO AVOID BRAIN DRAIN

Nine Member States¹⁴⁹ had in place measures and/or incentives to avoid brain drain – i.e. loss suffered by a country as a result of the emigration of a (highly) qualified person.¹⁵⁰ For example, Luxembourg had an agreement in place with Cape Verde which was intended to “encourage a temporary migration based on mobility and the incitation to a return of skills to the country of origin, in particular concerning students, professionals with a high level of qualification and management and thereby to promote a circular professional migration”.¹⁵¹ Furthermore, the agreement itself was based on the principle that ‘migratory movements must be conceived in a perspective that is favourable to development and must not translate into a definitive loss of the resources, competencies and dynamism of the country of origin.’¹⁵² Also in Hungary for example, the Scholarship Programme for Christian Young People required the scholarship holders to return to their sending country once the scholarship period was finished.

In Germany, concrete measures to prevent brain drain were largely set out in development-relevant promotional programmes of the Federal Ministry for Economic Cooperation and Development, which were implemented by the German Academic Exchange Service. One of them was “the provision of tools which facilitate and promote the return of urgently needed higher education graduates to their home countries and support them after their return.” In Ireland, the government’s development cooperation programme, Irish Aid, led by the Department of Foreign Affairs and Trade, was running the Irish Aid Fellowship programme which committed students to leave Ireland within 14 days of completing their studies and return to their country of origin.

In the United Kingdom the approach to avoid brain drain was also manifested by UK HEIs establishing campuses

abroad. These institutions provided international students with a more cost-effective means of obtaining a UK qualification as well as serving to reduce brain drain. For example, the Singapore Institute of Management which was partnered with the University of London was able to teach more students in Singapore than there were Singaporean students studying in all institutions in the United Kingdom.

Similar trends were identified in France, where one of the focuses of the government’s attractiveness strategy for international students announced on 19 November 2018 aimed to increase the presence and outreach of France abroad through a delocalised education offering, adapted to meet local needs. The government intended to intensify the projection of French universities and schools abroad, by building on two complementary objectives: to increase the outreach of French higher education by multiplying the training capacities of institutions abroad; and to reinforce French development aid policy, by offering young people in partner countries the “possibility of following courses offered by French institutions without having to leave their own country”.

In the Netherlands brain drain is in general not an aspect addressed in bilateral agreements, in which the main objective is attracting and retaining international talent. Nevertheless, there are programmes that focus specifically on assisting the development of knowledge in third countries. The scholarship programme StuNed (Studying in the Netherlands) is, for example, aimed at strengthening and further developing knowledge in Indonesia by allowing students to follow a programme in the Netherlands. The purpose of this programme is not to retain these students in the Netherlands, but for them to return to Indonesia after graduation, so that the acquired knowledge can be cascaded.



5.2. COOPERATION AMONG HEIS

The majority of HEIs in the Member States¹⁵³ had initiatives and cooperation agreements in place, often with third-country universities’ research institutes. HEIs in Member States equally cooperated with both institutions in industrialised countries as well as in developing countries. In most cases these initiatives were developed at the discretion of the individual HEI. Cooperation was often realised in the form of a Memoranda of Understanding (MoU), where the intentions for cooperation were laid down but were not of a binding nature, and in some cases, were directed towards specific fields of study. The scope of these agreements and MoUs varied across Member States and HEI, but generally they included student, teacher, researcher and/or personnel mobility. In the area of student mobility, the focus was on exchange programmes. In some cases, the effectiveness and implementation of these initiatives could be hindered by lack of financing, as for example highlighted by Poland.

149 AT, DE, ES, FI, FR, HU, IE, LU, UK.

150 EMN Glossary based on ILO Thesaurus, 6th ed., 2008.

151 Law of 20 July 2017, p. 2. See URL: <http://data.legilux.public.lu/file/eli-etat-leg-loi-2017-07-20-a672-jo-fr-pdf.pdf> (last accessed on 28 November 2018).

152 Article 10 (2) of the Law of 20 July 2017.

153 AT, BE, BG, CZ, DE, EE, ES, FI, FR, HR, HU, IE, IT, LU, LV, MT, NL, PL, PT, SE, SK, UK.

Box 14: Good practice example from the United Kingdom

The UK-based Universitas 21 network, a global network of research-intensive universities that encourages members to collaborate across borders and foster

global knowledge exchange, launched the 'U21 Jointly-Awarded PhD Project' to enable doctoral students to embark on joint degrees which will considerably enhance their research and employment opportunities on an international scale.

The 14 partner universities of the group, including four from the United Kingdom along with universities from Canada, Chile, India, Mexico and Japan etc., participate in the scheme under which two partner universities create a tailor-made programme of study for the student, taking their specific research needs into account and enabling close collaboration between the two institutions. The student has a supervisor in each location but then graduates with a single degree awarded for one PhD thesis. The project 'aims to foster the internationalisation of graduate research programmes and enhance student mobility and exchange', thereby enhancing considerably students' research and employment opportunities on a global scale.¹⁵⁴

Box 15: Good practice example from the Netherlands

The University of Groningen in the Netherlands served as a good example in relation to cooperation among HEI, having more than 600 international agreements. Most bilateral agreements came in the form of MoUs and exchange programmes (either within the Erasmus+ framework or with partners from outside of Europe). The exchange programmes were with partner organisations in, among others, East Asia (55 partners), North America (34 partners) and Latin America (27 partners). The university offered a large number of courses in English, making it relatively easy to enter into partnerships with other HEIs. In addition, the university established some relations with national funding agencies (inter alia in Indonesia, China, Brazil and Mexico).

Box 16: Good practice example from Sweden

In Sweden, the Linnaeus-Palme programme was reported to provide a cooperation framework between Sweden and non-EU countries in the form of an exchange programme intended to support bilateral contacts between higher education institutions in Sweden and low- and middle-income countries. The programme offered exchanges for students and teaching staff, was financed by the Swedish development cooperation agency SIDA and administered by the Swedish Council for Higher Education. Project-related cooperation was financed for up to eight years, participants received scholarships, and no tuition fees needed to be paid. In 2016, 32 Swedish higher education institutions participated in this initiative.



5.3. CHALLENGES

One of the main challenges identified across Member States was reciprocity in cases where bilateral agreements were in place. HEIs often faced challenges ensuring that the number of students sent and received remained balanced.¹⁵⁵ In Sweden, it was found that the demand from foreign students to come to Sweden was greater than Swedish students' interest in studying abroad, which in practice put a limit on expanding the official exchange programmes.¹⁵⁶

Lack of funding was also identified as a challenge in Croatia and Poland. In Croatia, for example, some of the bilateral agreements were realised in the framework of a programme/project established over a set period of time only. Upon the completion of the project, funding to continue cooperation was often unavailable.

Problems also arose in situations where cooperation and bilateral agreement among HEIs were established but in practice, national policies on migration hindered the exchange of students, with third-country nationals facing difficulties complying with the necessary visa procedures.

France reported a challenge that arose from global competition, with the emergence of new competitors that offered attractive grants for international students, for example Turkey and Saudi Arabia.

154 Baskerville (2013): A guide to UK higher education and partnerships for overseas universities. Available at: http://www.britishcouncil.org/ua/sites/default/files/guide-to-uk-he-and-partnerships_web_final.pdf

155 e.g. AT, CZ, EE, LU.

156 Universitetskanslersämbetet/Statistiska Centralbyrån (2018): *Internationell studentmobilitet i högskolan 2017/18*, UF 20 SM 1803.

6. CONCLUSIONS

This study explored the national policies and practices in place in Member States to attract international students from third countries and in some cases to also facilitate entry into the national labour market following graduation. The study is very topical in light of the transposition of the Students and Researchers Directive which provided the main framework of analysis for the admission conditions in place.

Almost half of all Member States considered attracting and retaining international students a policy priority.

The Directive aimed at enhancing the attractiveness of the EU as a study destination for international students and providing stronger incentives for them to join the labour market following graduation by introducing common legal requirements for admission and stay. In line with this, the study revealed that whilst the importance attributed to attraction and retention of international students varied significantly across Member States, almost half of all Member States considering attracting and retaining international students a policy priority.

International student mobility towards the EU has increased steadily over the past years. In 2017, over 460 000 first residence permits were issued for study reasons in the EU.

Over half of all first residence permits for the purpose of study were issued by three Member States (United Kingdom, France and Germany), with the United Kingdom – which does not implement the Students and Researchers Directive – being by far the most popular destination for international students in the EU. In terms of the share of third-country nationals within the population of all students, data for 2017 for 14 Member States showed that the highest share of international students from all students was in Cyprus (18 %), Germany (10 %), Hungary (9 %), Ireland (8 %) and Latvia (8 %). The highest number of international students coming to the EU in 2017 came from China (which accounted for almost a quarter of all first permits issued to international students in that year) followed by the United States, India, Ukraine, Brazil and Morocco. However, the top countries of origin differed significantly across Member States, largely driven by language and historic links.

The main policy drivers for attracting and retaining international students included the internationalisation of HEIs and increasing financial revenue for the higher education sector, contributing to economic growth by increasing the national pool

of qualified labour and addressing specific (skilled) labour shortages plus tackling demographic change.

The relatively large share of first permits issued to international students pointed to the importance of this student group for Member States and Higher Education Institutions (HEIs). Considering the fact that, in the majority of Member States, tuition fees for international students are significantly higher than for national or EU citizens, attracting international students provides positive immediate or long-term financial benefits for the higher education sector. At the same time, in some Member States, tuition fees sometimes merely compensate for higher costs related to the education and administration of international students or for the absence of subsidies from the state budget. Tuition fees can also be an obstacle to increasing the number of international students, in particular, those coming from low- and middle-income households. In addition to economic considerations, further drivers for attracting international students were the potential for increasing the pool of qualified labour and addressing labour shortages and demographic change. International students are also seen as important ambassadors both by their country of origin and the host country and a potential resource for future international partnerships.

Both national governments and HEIs alike in many Member States were found to implement comprehensive promotional activities and campaigns to attract international students, often combining their efforts.

The most common policies in place to attract international students were promotional activities and dissemination of information targeted at prospective international students, for example through online portals or education fairs organised in third countries. Provision of scholarships, provided both by the state and HEIs, as well as availability of English-language programmes, constituted two additional important attraction factors. Particularly smaller Member States or those with traditionally small numbers of international students have made significant efforts in increasing the number of English-language programmes, with over 800 being available in Poland. In terms of admission conditions, the adoption of the Students and Researchers Directive in 2016 greatly contributed to harmonising these across Member States and eliminating major differences in the criteria international students needed to fulfil to be granted a visa/residence permit for the purpose of study.

Member States identified a number of common challenges in attracting international students.

Common challenges encountered by Member States in attracting international students include limited availability of courses taught in foreign languages, especially in English; lengthy processing times of applications for visas and residence permits, especially for Member States with limited representation in third countries and limited promotional activities and scholarship possibilities. Next to these barriers to international student attraction, Member States reported challenges related to ensuring capacity and education standards in providing for international students. Some Member States reported that students faced problems securing (affordable) accommodation. Ensuring adequate infrastructure and staffing capacity within the HEIs was also reported by Member States to be a challenge. Lastly, finding the right balance between attracting an increasing number of international students while maintaining the quality of studies was reported as a challenge.

Post study retention measures were found to be in place in the majority of Member States and were mostly policy-related.

In contrast to this, the efforts of the national governments and HEIs with regard to the retention of students appear to be less coordinated than in the area of student attraction. At the national level, retention measures are mostly policy-related and seek to facilitate access to the labour market by eliminating certain restrictions in place for international graduates. A few Member States, notably Estonia, have provided additional facilitation measures, such as provision of career counselling services and facilitation for family reunification. In contrast, retention policies implemented by HEIs generally aim at bridging the gap between graduation and finding employment, by providing career counselling and assisting with finding internships and employment.

Some factors which significantly contributed to student attraction did not necessarily benefit student retention.

It is important to note that some factors which significantly contributed to student attraction did not necessarily benefit also student retention. For example, although the significant increase in the number of programmes taught in English had a positive impact on the number of international students in Member States, some Member States reported that this hampered the long-term integration of international students into the labour market, as they were less inclined to learn the national language. Hence, in these situations, retention policies were more likely to succeed if started during the period of study, for example by incentivising the participation in language courses for the national language or supporting international students in carrying out internships or voluntary work in the local community. Such measures could also serve to counteract challenges encountered by some Member States related to the competitiveness of the conditions offered on the labour market and the living standards available to graduates.

Member States aim to balance policies to attract and retain international students with measures to prevent abuse of the student route for other migration purposes.

The issue of attracting and retaining international students has to be seen in light of the general migration policy of the EU and its Member States in recent years. Partly as a result of concerns about irregular migration, some Member States have started to implement more restrictive policies towards international students to prevent misuse of the student migration route, while simultaneously pursuing the goal of attracting international students. Member States thus faced the challenge of finding a balance between providing favourable conditions to attract international students and preventing the misuse of this migration channel. Hence, Member States developed highly targeted policies to attract and retain those international students with the skills and qualifications to address labour market needs in the EU and to ensure such opportunities were made available only to those with the genuine intention to pursue higher education in the EU. Here, well-functioning cooperation between national immigration authorities and HEIs was crucial, as it remained the HEIs' responsibility to report cases of insufficient progress in the relevant studies.

Bilateral and multilateral agreements with third countries have created important frameworks for cooperation.

At the same time, bilateral and multilateral agreements were providing important frameworks to support a range of benefits, such as exchanging experiences and practices, teachers, students and researchers. They were also seen as offering opportunities for prospective students particularly from developing countries, facilitating this legal channel of migration as an alternative to irregular migration from third countries.

Future outlook

The Study showed that the Students and Researchers Directive has provided a common framework for admission of international students across EU Member States. Although it is too early to report on the impact of the Directive and the changes made at national level, there is evidence that Member States are facing similar challenges particularly in attracting international students, including ensuring sufficient capacity and quality service provision for international students. In this respect, there are opportunities for identifying and sharing good practices in the attraction and retention of international students if the EU as a whole is to improve its position in the global competition for talent.

7. STATISTICAL ANNEX

Table 1: Number of HEIs in Member States, disaggregated by status

MS	2013			2014			2015			2016			2017		
	Total	Of which public (in %)	Of which private (in %)	Total	Of which public (in %)	Of which private (in %)	Total	Of which public (in %)	Of which private (in %)	Total	Of which public (in %)	Of which private (in %)	Total	Of which public (in %)	Of which private (in %)
BG	51	73%	27%	51	73%	27%	51	73%	27%	51	73%	27%	51	73%	27%
CY				53	15%	85%							57	86%	14%
CZ	260	60%	40%	264	59%	41%	258	60%	40%	254	61%	39%	249	62%	38%
DE ¹⁵⁷	437	62%	29%	445	61%	30%	444	62%	30%	445	62%	30%	476	58%	34%
EE	26	65%	35%	25	64%	36%	24	67%	33%	21	67%	33%	20	70%	30%
ES	82	61%	39%	83	60%	40%	84	60%	40%	84	60%	40%	84	60%	40%
EL	35	100%	0	35	100%	0	35	100%	0	35	100%	0	35	100%	0
FI	44	66%	34%	42	62%	38%	41	49%	51%	41	41%	59%	41	41%	59%
FR	4,568	75%	25%	4604	76%	24%	4639	76%	24%	4649	76%	24%	4966	78%	22%
HU ¹⁵⁸	67	42%	39%	67	42%	21%	65	46%	14%	66	45%	17%	66	44%	18%
IE ¹⁵⁹	42	67%	33%	42	67%	33%	40	65%	35%	40	65%	35%	40	65%	35%
IT ¹⁶⁰													359	19%	8%
LT													44	61%	39%
LV	57	53%	47%	56	54%	46%	54	54%	46%	53	55%	45%	49	57%	43%
NL	136	41%	59%	139	40%	60%	134	42%	58%	131	43%	57%	128	44%	56%
PL	536	42%	58%	531	43%	57%	515	44%	56%	500	45%	55%	490	46%	54%
PT	131	30%	70%	127	30%	70%	127	30%	70%	124	31%	69%	117	32%	68%
SE													48	65%	35%
SK ¹⁶¹	36	56%	36%	36	56%	36%	35	57%	34%	35	57%	34%	35	57%	34%
UK				836	19%	81%									

Source: EMN NCPs

157 Church-run private institutions: 9% (2013), 8% (2014), 8% (2015), 9% (2016), 8% (2017).

158 Church-run private institutions: 19% (2013), 37% (2014), 40% (2015), 38% (2016), 38% (2017).

159 Due to a lack of available data on the total number of private HEIs, the figures provided are based on an estimated number of total HEIs (public and private) in Ireland.

160 Higher Education Institutions for Fine Arts, Music and Dance (private): 45% (2017); Technical Higher Education Institutions (private): 28% (2017).

161 State institutions: 8% (2013), 8% (2014), 9% (2015), 9% (2016), 9% (2017).

Table 2: Number of students enrolled in HEIs in Member States, disaggregated by EU and non-EU international students¹⁶²

MS	2013			2014			2015			2016			2017		
	Total students	Of which EU nationals (in %)	Of which TCNs (in %)	Total students	Of which EU nationals (in %)	Of which TCNs (in %)	Total students	Of which EU nationals (in %)	Of which TCNs (in %)	Total students	Of which EU nationals (in %)	Of which TCNs (in %)	Total students	Of which EU nationals (in %)	Of which TCNs (in %)
AT	423,966	15%	6%	426,945	15%	6%	430,697	15%	7%	436,232	16%	7%	436,672	16%	7%
CY	33,674	21%	8%	37,166	25%	10%	40,347	29%	15%	44,446	31%	16%	48,172	32%	18%
CZ	367,747	7%	4%	346,893	8%	4%	326,528	8%	5%	311,168	9%	5%	299,054	9%	6%
DE	2,616,881	4%	8%	2,698,910	4%	8%	2,757,799	4%	9%	2,807,010	4%	9%	2,844,978	4%	10%
EE ¹⁶³	59,998	3%	3%	55,214	3%	4%	51,092	4%	5%	47,794	4%	6%	46,154	4%	7%
ES	1,553,137	2%	3%	1,538,241	2%	4%	1,548,369	2%	4%	15,64,943	3%	5%			
FI	308,917	1%	5%	306,059	1.5%	5.0%	302,478	2%	5%	297,163	2%	5%	295,528	2%	6%
HU	221,521	4%	4%	214,607	4.5%	5.1%	206,922	5%	6%	201,908	5%	7%	198,546	5%	9%
IE ¹⁶⁴ ₁₆₅	166,640	2.6%	5.6%	169,212	2.7%	6.1%	174,501	2.9%	6.6%	176,578	2.6%	7.3%	180,044	2.7%	8.1%
LT	137,901	0%	2%	129,689	0%	3%	123,259	0%	3%	111,383	0%	4%	107,700	0%	4%
LV	65,112			62,552	4%	4%	61,593	4%	5%	60,275	4%	6%	58,925	4%	8%
NL				700,637	7%	2%	701,350	7%	2%	712,115	8%	3%	730,218	8%	3%
PL	896,748	0%	2%	910,082	1%	3%	898,502	1%	4%	877,480	1%	5%	837,607	1%	6%
PT	360,818	3%	5%	350,513		5%	337,507		5%	343,117		6%	346,963		7%
SK	148,095	3%	1%	142,461	3%	1%	134,856	4%	2%	127,065	4%	3%	120,486	4%	4%
UK ¹⁶⁶	1,696,030	6%	17%	1,697,095	6%	17%	1,740,530	6%	16%	1,798,040	7%	16%			

Source: EMN NCPs

162 Disaggregation not available in France as statistical data include TCN + EU students (without distinction).

163 Nationality unclassified: 689 (2013), 531 (2014), 396 (2015), 281 (2016), 365 (2017).

164 Data on international students in Ireland only include those enrolled in public HEIs.

165 Nationality 'unknown': 237 (2013), 410 (2014), 549 (2015), 589 (2016), 733 (2017).

166 UK Data refer to country of domicile, not nationality.

Table 3: Number of international students enrolled in HEIs disaggregated by study level¹⁶⁷

MS	2013				2014				2015				2016				2017			
	Total students TCN	of which Bachelor students (ISCED level 6)	of which Master students (ISCED level 7)	of which PhD students (ISCED level 8)	Total students TCN	of which Bachelor students (ISCED level 6)	of which Master students (ISCED level 7)	of which PhD students (ISCED level 8)	Total students TCN	of which Bachelor students (ISCED level 6)	of which Master students (ISCED level 7)	of which PhD students (ISCED level 8)	Total students TCN	of which Bachelor students (ISCED level 6)	of which Master students (ISCED level 7)	of which PhD students (ISCED level 8)	Total students TCN	of which Bachelor students (ISCED level 6)	of which Master students (ISCED level 7)	of which PhD students (ISCED level 8)
AT	26,447	44%	33%	10%	26,940	43%	33%	10%	28,551	42%	35%	10%	30,499	43%	35%	9%	32,121	43%	35%	9%
CY	2,714				3,862				6,085	47%	29%	1%	7,195	54%	21%	1%	8,648	58%	18%	1%
CZ	13,159	70%	20%	10%	14,371	71%	20%	9%	15,729	70%	21%	9%	16,998	69%	22%	9%	17,959	67%	23%	10%
EE	1,805	57%	33%	10%	2,067	48%	41%	11%	2,407	44%	45%	11%	2,783	40%	50%	10%	3,200	40%	50%	10%
ES	498,93	49%	45%	6%	55,515	45%	44%	11%	67,220	38%	46%	16%	75,125	36%	46%	18%				
FI	14,609	55%	33%	13%	15,162	52%	34%	14%	15,455	51%	34%	15%	15,640	50%	35%	15%	16,470	48%	37%	15%
HU	9,671	30%	58%	3%	10,913	31%	54%	3%	12,133	33%	55%	4%	14,533	35%	55%	5%	17,795	37%	53%	6%
IE ¹⁶⁸	9,405	66%	21%	11%	10,280	67%	20%	11%	11,465	66%	21%	11%	12,806	64%	23%	10%	14,545	59%	28%	10%
LT	3,147	79%	21%	1%	3,402	74%	25%	2%	3,750	71%	28%	2%	4,250	73%	25%	3%	4,170	66%	31%	3%
LV					2,456	63%	32%	3%	3,229	62%	31%	4%	3,483	58%	34%	3%	4,857	62%	34%	2%
NL					14,361	57%	43%		16,386	61%	55%		18,576	46%			21,725			
PL	20,121	66%	31%	3%	31,051	67%	30%	3%	39,904	68%	30%	3%	47,795	67%	30%	2%	53,924	66%	32%	2%
SK ¹⁶⁹	1,590	46%	21%	7%	1,874	49%	22%	5%	2,447	52%	22%	4%	3,215	59%	19%	3%	4,341	63%	17%	3%
UK ¹⁷⁰	281,350				284,005				285,120				284,000							

Source: EMN NCPs

¹⁶⁷ Not available in France as statistical data include TCN + EU students (without distinction).

¹⁶⁸ Data on international students in Ireland only include those enrolled in public HEIs.

¹⁶⁹ Slovakia has available data joined for bachelor's and master's degrees: 26% (2013), 24% (2014), 21% (2015), 19% (2016), 16% (2017).

¹⁷⁰ In the UK, the degree level is classified as: first degree students, postgraduate taught students and postgraduate research students. See UK National Report for detailed statistics.

Table 4: Number of international students enrolled in HEIs disaggregated by study topic and top nationalities in 2016¹⁷¹

Member States	Total TCN in all fields	Education		Arts and humanities		Social sciences, journalism and information		Business, administration and law		Natural sciences, mathematics and statistics	
		Total TCN students	Top nationalities	Total TCN students	Top nationalities	Total TCN students	Top nationalities	Total TCN students	Top nationalities	Total TCN students	Top nationalities
AT	30,499	1,450	Turkey 266 Bosnia 241 Serbia 174	4,869	Russia 456 Ukraine 431 Serbia 425	3,672	Turkey 707 Bosnia 395 Serbia 325	7,177	Bosnia 1023 Turkey 783 Serbia 781	2,519	Bosnia 291 Turkey 198 Serbia 177
CZ	16,998	315	Russia 136 Ukraine 73 Kazakhstan 12	1,341	Russia 568 Ukraine 260 Belarus 82	1,993	Russia 628 Ukraine 323 Kazakhstan 165	5,123	Russia 2,152 Ukraine 897 Kazakhstan 719	904	Russia 283 Ukraine 162 Kazakhstan 47
EE	2,783	94	Russia 69 Ukraine 5* Nigeria 5*	435	Russia 177 Ukraine 51 India 9	316	Russia 61 Nigeria 41 Georgia 38	648	Russia 159 Nigeria 104 Ukraine 69	189	Nigeria 52 Russia 39 Ukraine 13
ES	75,125	5,423	Ecuador 1625 Colombia 274 Mexico 114	8,065	Colombia 420 China 401 Mexico 322	11,622	Colombia 697 Ecuador 590 Mexico 433	20,182	Colombia 1497 Ecuador 1265 Peru 703	4,499	Ecuador 534 Colombia 446 Mexico 211
FI	15,640	346	China 54 Russia 39 Vietnam	988	Russia 274 China 114 Vietnam 14	633	China 82 Russia 78 Vietnam 23	3,891	Russia 1037 Vietnam 961 China 373	1,032	China 152 Russia 94 Pakistan 91
HU	14,533	293	Serbia 220 Ukraine 33 China 5*	1,251	Serbia 270 Ukraine 228 China 151	1,941	China 291 Serbia 141 Turkey 134	1,245	China 357 Serbia 122 Turkey 64	489	Serbia 172 Ukraine 63 China 16
IE¹⁷²	14,545	84	N/I	1,359	N/I	888	N/I	2,861	N/I	1,211	N/I
PL	47,795	503	Ukraine 392 Belarus 48 Russia 13	5,311	Ukraine 3569 Belarus 695 Russia 225	9,882	Ukraine 6814 Belarus 972 Turkey 317	14,197	Ukraine 9617 Belarus 1252 India 991	1,129	Ukraine 625 Belarus 133 India 75
SK	3,215	339	Ukraine 193 Serbia 119 Turkey 8	439	Ukraine 272 Serbia 57 Turkey 8	300	Ukraine 130 Serbia 55 Turkey 24	458	Ukraine 239 Serbia 42 Turkey 22	191	Ukraine 75 Serbia 70 Turkey 5*

Source: EMN NCPs

For data protection reasons, '5' means 5 or less.

171 Not available in France as statistical data include TCN + EU students (without distinction).

172 Data on international students in Ireland only include those enrolled in public HEIs.

Table 5: Number of international students, disaggregated by study topic and top nationalities in 2016¹⁷³

Member States	Total TCN all fields	Information and Communication Technologies		Engineering, manufacturing and construction		Agriculture, forestry, fisheries and veterinary		Healthcare and welfare		Services	
		Total TCN students	Top nationalities	Total TCN students	Top nationalities	Total TCN students	Top nationalities	Total TCN students	Top nationalities	Total TCN students	Top nationalities
AT	30,499	2,086	Bosnia 390 Turkey 322 Serbia 167	5,923	Turkey 1,180 Bosnia 988 Serbia 491	231	Bosnia 25 Serbia 14 Russia 7	1,790	Bosnia 250 turkey 143 Serbia 137	596	Serbia 83 Bosnia 74 Turkey 45
CZ	16,998	1,481	Russia 529 Ukraine 285 Kazakhstan 148	2,724	Russia 904 Ukraine 436 Kazakhstan 267	658	Russia 170 Ukraine 94 Vietnam 62	1,833	Russia 246 Ukraine 191 Kazakhstan 43	805	Russia 352 Ukraine 184 Kazakhstan 100
EE	2,783	388	Ukraine 68 Russia 60 India 28	579	Russia 162 India 62 Nigeria 47	13	Russia 6 Georgia 1	95	Russia 69 Ukraine 7 India 4	26	Russia 21 Ukraine 4
ES	75,125	2897	Ecuador 187 Colombia 67 Mexico	10,386	Ecuador 888 Colombia 596 Mexico 500	911	Ecuador 89 Mexico 57 Colombia 49	6,768	Colombia 300 Ecuador 238 Mexico 221	4,372	Ecuador 246 China 171 Colombia 154
FI	15,640	3171	China 464 Russia 408 Vietnam 383	3,348	Russia 764 Nepal 388 China 368	266	China 86 Russia 23 Nepal 14	1,257	Nepal 105 Russia 95 China 87	708	Russia 233 Vietnam 146 Nepal 79
HU	14,533	727		1,555	Nigeria 143 Serbia 133 China 124	529	Serbia 31 Nigeria 23 Ukraine 13	5,439	Iran 1079 Nigeria 567 Israel 503	362	China 77 Serbia 60 Ukraine 25
IE¹⁷⁴	14,545	1,133	N/I	1,821	N/I	192	N/I	4,564	N/I	287	N/I
PL	47,795	3014	Ukraine 2,106 Belarus 270 India 152	4,782	Ukraine 2529 India 527 Belarus 429	348	Ukraine 177 Belarus 34 Turkey 10	3,445	Ukraine 819 Belarus 241 India 125	5,436	Ukraine 4502 Belarus 596 Russia 84
SK	3,215	165	Ukraine 67 Serbia 60 Turkey 2	487	Ukraine 257 Serbia 58 Turkey 36	49	Serbia 19 Ukraine 9 Israel 4	638	Israel 247 Iran 108 Ukraine 45	149	Ukraine 103 Turkey 17 Serbia 9

Source: EMN NCPs

173 Not available in France as statistical data include TCN + EU students (without distinction).

174 Data on international students in Ireland only include those enrolled in public HEIs.

Table 6: Number of international graduates, disaggregated by study level

MS	2013				2014				2015				2016				2017			
	No. of international students who have graduated (total)	of which Bachelor degree (ISCED level 6)	of which Master degree (ISCED level 7)	of which PhD (ISCED level 8)	No. of international students who have graduated (total)	of which Bachelor degree (ISCED level 6)	of which Master degree (ISCED level 7)	of which PhD (ISCED level 8)	No. of international students who have graduated (total)	of which Bachelor degree (ISCED level 6)	of which Master degree (ISCED level 7)	of which PhD (ISCED level 8)	No. of international students who have graduated (total)	of which Bachelor degree (ISCED level 6)	of which Master degree (ISCED level 7)	of which PhD (ISCED level 8)	No. of international students who have graduated (total)	of which Bachelor degree (ISCED level 6)	of which Master degree (ISCED level 7)	of which PhD (ISCED level 8)
AT	1,694	478	977	229	1,853	644	952	247	1,977	677	1,070	225	2,204	787	1,176	237	2,273	745	1,242	280
CY	1,164	746	100	0	906	600	100	0	738	480	128	2	596	316	192	6				
CZ	8,411	4,334	3,772	308	8,425	4,161	3,949	323	8,026	3,843	3,850	338	8,217	4,065	3,794	364	8,400	3,990	4,008	406
DE	24,470	6,365	14,235	3,870	25,861	6,754	15,042	4,065	27,616	6,770	16,491	4,355	29,308	7,170	17,832	4,306				
EE	98	25	70	3	201	46	142	13	357	93	244	20	484	89	371	24	645	122	494	29
EL														1,273	154	44				
ES	7,301	640	6,661		8,505	1,008	7,497		9,103	1,072	8,031		11,146	1,268	9,878		15,425	1,854	1,357	
FI	3,617	1,733	1,518	366	3,974	1,852	1,664	458	4,394	2,071	1,860	463	4,532	2,097	1,923	512	4,330	1,924	1,912	494
HU	2,225	872	1,273	48	2,571	912	1,572	59	2,584	1,019	1,494	53	2,848	994	1,790	57	3,303	1,035	2,171	77
IE ¹⁷⁵	2,498	1,056	1,168	221	3,070	1,296	1,533	199	3,214	1,419	1,531	190	3,786	1,666	1,828	179	4,608	1,837	2,455	206
IT					10,463	5,170	4,292	949	11,210	5,397	4,796	942	11,566	5,654	4,906	895				
LT	475	309	158	3	523	294	227	0	485	181	294	2	624	281	331	3	767	372	387	5
LV					520	250	256	10	862	300	486	17	1,042	386	580	44	1,074	497	516	17
PL					3,110	1,401	1,715		4,914	2,453	2,344	118	6,542	3,554	2,861	131	8,612	5,010	3,441	164
PT	3,520	862	2,153	505	3,955	886	2,482	587	3,228	994	1,852	382	3,527	1,005	2,069	452	3,784	1,133	2,130	485
SK ¹⁷⁶	905	590	241	74	1,085	707	305	73	1,796	1,042	673	81	2,194	1,604	495	95	3,101	2,357	631	113

Source: EMN NCPs

175 Data on international students in Ireland only include those enrolled in public HEIs.

176 Includes students from third countries with permanent residence in SK.

Table 7: Top 5 Nationalities among International Students enrolled in HEIs per Member State and gender ratio

MS	Rank	2013			2014			2015			2016			2017		
		Nationality	Total	% Female	Nationality	Total	% Female	Nationality	Total	% Female	Nationality	Total	% Female	Nationality	Total	% Female
AT	1	Turkey	3,148	38%	Turkey	2,897	38%	Turkey	2,717	39%	Turkey	2,551	39%	Bosnia	2,607	55%
	2	Bosnia	2,067	50%	Bosnia	1,862	51%	Bosnia	2,024	52%	Bosnia	2,385	53%	Turkey	2,374	40%
	3	Serbia	1,294	51%	Serbia	1,227	54%	Serbia	1,333	55%	Serbia	1,459	55%	Serbia	1,525	56%
	4	Russia	1,033	77%	Russia	1,103	78%	Russia	1,258	79%	Russia	1,368	78%	Russia	1,498	78%
	5	Ukraine	1,003	77%	Ukraine	991	75%	Iran	1,138	49%	Ukraine	1,233	72%	Iran	1,412	51%
BG	1	Turkey	3,852		Turkey	3,180		Turkey	2,394		Turkey	1,850		Turkey	1,492	
	2	FYROM	500		FYROM	500								Ukraine	767	
CY	1	Bangladesh	1,427	2%	Bangladesh	834	4%	Bangladesh	1,232		India	2,340	15%	India	2,340	15%
	2	India	962	5%	Pakistan	736	1%	Nigeria	950	25%	Bangladesh	2,406	1%	Bangladesh	2,406	1%
	3	Pakistan	958	1%	India	640	11%	Pakistan	810	2%	Pakistan	886	2%	Pakistan	886	2%
	4	Nigeria	482	21%	Russia	464	66%	India	542	10%	India	476	18%	Nigeria	476	18%
	5	Nepal	416	21%	Nigeria	356	19%	Russia	342	68%	Russia	314	62%	Russia	314	62%
CZ	1	Russia	4,366	64%	Russia	5,304	64%	Russia	5,764	65%	Russia	5,983	66%	Russia	5,864	65%
	2	Ukraine	2,079	60%	Ukraine	2,319	61%	Ukraine	2,653	60%	Ukraine	3,015	60%	Ukraine	3,238	61%
	3	Kazakhstan	1,376	59%	Kazakhstan	1,447	59%	Kazakhstan	1,516	58%	Kazakhstan	1,650	59%	Kazakhstan	1,673	58%
	4	Vietnam	966	46%	Vietnam	866	43%	Vietnam	829	41%	Belarus	751	62%	Belarus	771	62%
	5	Belarus	610	63%	Belarus	628	65%	Belarus	688	63%	Vietnam	698	39%	India	687	27%
DE	1	China	28,381	51%	China	30,259	50%	China	32,268	50%	China	34,997	50%	China	36,915	51%
	2	Russia	11,126	78%	India	11,655	23%	India	13,537	24%	India	15,308	25%	India	17,294	26%
	3	India	9,372	22%	Russia	11,534	77%	Russia	11,413	76%	Russia	11,295	75%	Russia	10,795	75%
	4	Turkey	6,701	40%	Turkey	6,785	41%	Cameroon	7,106	39%	Cameroon	7,425	39%	Syria	8,618	18%
	5	Ukraine	6,411	77%	Cameroon	6,672	39%	Ukraine	6,941	75%	Iran	7,123	48%	Turkey	7,633	43%
EE	1	Russia	184	66%	Russia	232	68%	Russia	263	67%	Russia	275	62%	Nigeria	310	20%
	2	Turkey	83	17%	Georgia	109	39%	Nigeria	175	17%	Nigeria	266	20%	Russia	294	63%
	3	Georgia	81	35%	Turkey	108	19%	Ukraine	171	50%	Ukraine	230	48%	Ukraine	248	48%
EL	1	China	69	49%	Ukraine	98	53%	Georgia	137	39%	Georgia	162	41%	Georgia	157	39%
	2	Ukraine	60	55%	India	97	11%	India	129	13%	India	134	18%	Turkey	154	23%
	3	Albania	3,063	63%												
	4	Russia	369	68%												
	5	Ukraine	326	72%												
ES	1	Colombia	1,380	53%	Colombia	1,771	51%	Ecuador	4,744	55%	Ecuador	5,933	54%	Ecuador	5,933	54%
	2	Morocco	1,364	49%	Ecuador	1,485	48%	Colombia	3,581	47%	Colombia	4,500	48%	Colombia	4,500	48%
	3	Mexico	1,284	47%	Mexico	1,224	48%	Mexico	2,262	47%	Mexico	2,629	49%	Mexico	2,629	49%
	4	China	1,072	64%	Morocco	1,089	50%	Peru	1,372	51%	China	1,837	62%	China	1,837	62%
	5	Ecuador	1,017	47%	China	944	64%	China	1,329	61%	Peru	1,756	52%	Peru	1,756	52%

MS	Rank	2013			2014			2015			2016			2017		
		Nationality	Total	% Female	Nationality	Total	% Female	Nationality	Total	% Female	Nationality	Total	% Female	Nationality	Total	% Female
FI	1	Russia	2,206	62%	Russia	2,555	62%	Russia	2,799	60%	Russia	2,799	60%	Russia	2,733	60%
	2	China	2,137	54%	China	2,107	55%	China	1,929	56%	Vietnam	1,894	54%	Vietnam	2,528	54%
	3	Vietnam	1,151	56%	Vietnam	1,366	56%	Vietnam	1,600	56%	China	1,770	57%	China	1,738	57%
	4	Nepal	1,128	16%	Nepal	1,166	17%	Nepal	1,137	15%	Nepal	1,196	18%	Nepal	1,161	19%
	5	Nigeria	820	13%	India	693	23%	India	756	25%	Pakistan	731	13%	India	776	28%
FR	1	China (incl. HK)	10,372	67%	China (incl. HK)	10,213	67%	China (incl. HK)	9,962	67%	China (incl. HK)	10,760	68%	Morocco	10,249	44%
	2	Morocco	6,720	42%	Morocco	7,607	42%	Morocco	8,071	43%	Morocco	8,312	44%	China (incl. HK)	10,107	68%
	3	Algeria	3,233	40%	Algeria	3,429	38%	Algeria	5,059	39%	Algeria	6,837	42%	Algeria	8,963	43%
	4	USA	3,224	73%	Tunisia	2,986	49%	Tunisia	3,247	51%	Tunisia	3,592	54%	Tunisia	3,786	53%
	5	Brazil	2,839	53%	Brazil	2,797	54%	South Korea	2,668	74%	South Korea	2,637	73%	Senegal	3,437	37%
HU	1	Serbia	1,181	58%	Serbia	1,182	59%	Serbia	1,354	59%	Serbia	1,632	58%	Serbia	1,636	56%
	2	Iran	987	40%	Iran	985	42%	Iran	1,110	43%	Iran	1,409	46%	Iran	1,871	47%
	3	China	437	50%	China	711	48%	China	1,142	49%	China	1,557	54%	China	2,056	56%
	4	Nigeria	826	53%	Nigeria	933	52%	Nigeria	1,068	49%	Nigeria	1,027	50%	Nigeria	1,003	49%
	5	Ukraine	807	52%	Ukraine	780	54%	Ukraine	807	54%	Ukraine	918	56%	Ukraine	899	57%
IE ^{177, 178}	1	China	1,619	N/I	China	1,668	51%	China	1,670	46%	China	2,008	49%	China	N/I	N/I
	2	Malaysia	1,258	N/I	Malaysia	1,440	59%	Malaysia	1,468	57%	US	1,575	65%	US	N/I	N/I
	3	US	1,158	N/I	US	1,282	62%	US	1,253	63%	Malaysia	1,539	58%	Malaysia	N/I	N/I
	4	Canada	961	N/I	India	756	27%	Saudi Arabia	1,071	50%	Canada	1,263	57%	Canada	N/I	N/I
	5	India	536	N/I	Saudi Arabia	753	37%	Canada	1,070	55%	India	1,128	33%	India	N/I	N/I
IT	1				Albania	11,429	66%	Albania	12,581	58%	China (inc. H-K)	13,768	59%	China (inc. H-K)		
	2				China (inc. H-K)	11,318	57%	Albania	11,460	66%	Albania	10,724	66%	Albania		
	3				Iran	3,866	52%	Iran	3,495	50%	Iran	3,935	52%	Iran		
	4				Cameroon	2,767	45%	Cameroon	2,753	44%	Cameroon	2,611	44%	Cameroon		
	5				Moldova	2,155	74%	Ukraine	2,367	76%	Ukraine	2,552	74%	Ukraine		
LT	1	Belarus	1,677	72%	Belarus	1,532	72%	Belarus	1,231	73%	Belarus	1,208	75%	Belarus	970	75%
	2	India	235	14%	India	370	11%	India	621	88%	India	807	14%	India	922	18%
	3	Nigeria	199	10%	Ukraine	227	60%	Ukraine	328	53%	Ukraine	368	53%	Ukraine	514	58%
	4	Russia	178	66%	Nigeria	208	8%	Nigeria	298	11%	Nigeria	199	13%	Israel	226	47%
	5	Ukraine	155	57%	Russia	199	60%	Azerbaijan	210	15%	Azerbaijan	194	18%	Bangladesh	203	5%
LV	1	Russia	482	58%	Uzbekistan	625	24%	Uzbekistan	874	25%	Uzbekistan	1,025	24%	India	1,233	10%
	2	Uzbekistan	366	25%	Russia	502	54%	Russia	571	50%	India	714	10%	Uzbekistan	1,116	11%
	3	Ukraine	233	52%	Kazakhstan	257	37%	India	429	9%	Russia	516	49%	Russia	515	50%
	4	Turkey	199	30%	Belarus	200	52%	Kazakhstan	327	42%	Kazakhstan	276	38%	Kazakhstan	306	36%
	5	Belarus	171	56%	Ukraine	196	59%	Ukraine	233	54%	Ukraine	242	43%	Ukraine	252	42%

177 Data on international students in Ireland only include those enrolled in public HEIs.

178 Data reported refers to the domiciliary origin of non-EEA students, as opposed to nationality.

MS	Rank	2013			2014			2015			2016			2017		
		Nationality	Total	% Female	Nationality	Total	% Female	Nationality	Total	% Female	Nationality	Total	% Female	Nationality	Total	% Female
NL	1	China (incl. HK)	4,302	60%	China (incl. HK)	4,198	59%	China (incl. HK)	4,238	60%						
	2	Indonesia	853	56%	Indonesia	846	56%	Indonesia	1,017	54%						
	3	India	546	25%	India	661	24%	India	925	25%						
	4	Suriname	540	67%	Suriname	532	57%	Russia	650	67%						
	5	USA	509	57%	Russia	517	65%	USA	585	59%						
PL	1	Ukraine	12,214	60%	Ukraine	20,099	58%	Ukraine	26,383	55%	Ukraine	30,974	54%	Ukraine	33,213	55%
	2	Belarus	2,815	58%	Belarus	3,476	58%	Belarus	4,076	58%	Belarus	4,621	60%	Belarus	5,487	60%
	3	Russia	590	66%	Russia	871	66%	Russia	903	66%	India	2,077	17%	India	2,932	17%
	4	China	506	53%	China	685	53%	India	858	17%	Russia	957	67%	Turkey	1,204	24%
	5	Kazakhstan	403	61%	Turkey	604	18%	China	900	51%	Turkey	950	22%	China	1,066	51%
PT	1	Brazil	4,769	55%	Brazil	5,218	58%	Brazil	5,438	56%	Brazil	6,372	57%	Brazil	7,764	56%
	2	Angola	1,584	45%	Angola	2,121	43%	Angola	2,364	43%	Angola	2,761	43%	Angola	2,916	43%
	3	Capo Verde	1,548	52%	Capo Verde	1,832	52%	Capo Verde	1,899	53%	Capo Verde	2,190	53%	Capo Verde	2,267	53%
	4	Mozambique	438	42%	Mozambique	483	38%	Mozambique	596	40%	Mozambique	691	43%	Mozambique	751	45%
	5															
SE	1	China (incl. HK)	2,547	53%	China (incl. HK)	2,373	51%	China (incl. HK)	2,337	50%	China (incl. HK)	2,418	50%			
	2	Iran	1,775	45%	Iran	1,454	45%	India	1,354	23%	India	1,683	23%			
	3	India	1,096		India	1,057		Iran	1,303		Iran	1,226				
	4	Pakistan	1,055		Pakistan	784		Pakistan	788		Pakistan	841				
	5	Bangladesh	600		USA	494		USA	527		Bangladesh	516				
SK	1	Serbia	331	55%	Serbia	360	54%	Ukraine	661	48%	Ukraine	1,138	46%	Ukraine	1,824	49%
	2	Israel	180	33%	Ukraine	358	51%	Serbia	349	65%	Serbia	435	52%	Serbia	448	55%
	3	Ukraine	159	55%	Israel	193	37%	Israel	232	37%	Israel	264	37%	Israel	286	42%
	4	Russia	36	72%	Russia	51	75%	Iran	53	49%	Iran	104	54%	Iran	180	48%
	5	Iran	22	50%	Iran	31	45%	Russia	45	60%	Russia	61	52%	Russia	91	54%
UK ¹⁷⁹	1	China	87,895		China	89,540		China	91,215		China	95,090				
	2	India	19,750		India	18,320		Malaysia	17,405		USA	17,580				
	3	Nigeria	18,020		Nigeria	17,920		USA	17,115		Hong Kong	16,680				
	4	Malaysia	16,635		Malaysia	17,060		India	16,745		India	16,550				
	5	USA	16,485		USA	16,865		Hong Kong	16,745		Malaysia	16,370				

Source: EMN NCPs

179 UK statistics based on country of domicile not nationality.

Table 8: Number of study permits changed to permits for other reasons

	Employment reasons			Self-employment			Family reasons			Other reasons					
	2013	2014	2015	2016	2017	2013	2014	2015	2016	2017	2013	2014	2015	2016	2017
FR ¹⁸⁰	4,797	5,384	4,782	4,883	4,823	451	542	654	839	950	3,878	4,337	4,008	3,782	3,517
IE ¹⁸¹	48	550	566	743	871										
IT ¹⁸²	63,104	52,142	51,446	44,370	41,238										
LV ¹⁸³	14	29	24	34	53						33	17	34	49	62
SE ¹⁸⁴	849	556	419	394	788						20	30	57	60	84
SK	42	82	170	170	363						2	7	70	16	11

Source: EMN NCPs

¹⁸⁰ Other permits commonly include: retired, visitor, intern, exceptional permit to stay (admission exceptionnelle au séjour), soldier, victim of THB, international protection, statelessness, unaccompanied minor.

¹⁸¹ Data shows the number of non-EEA nationals on a student residence permission who were subsequently granted an employment permit.

¹⁸² Number of study residence permits converted into permits for job reasons (law allows conversion before graduation).

¹⁸³ Data shows those permits issued no later than six months after graduation, if it has been issued later it is not included in the table: no data on two years after graduation.

¹⁸⁴ Residence permits granted for employment purposes to people previously holding a residence permit for study purposes.

Table 9: Top 20 countries of origin for new permits issued for study reasons in the EU 28, 2013 - 2017

	2013	2014	2015	2016	2017
China including Hong Kong	96,573	97,560	99,049	111,243	118,830
United States	36,386	31,976	75,892	33,192	33,000
India	19,927	20,946	24,992	25,787	32,317
Brazil	16,178	19,497	19,919	17,288	16,248
Ukraine	13,969	18,040	14,323	11,932	13,472
Russia	12,741	12,710	11,365	11,144	11,358
Turkey	10,884	11,016	10,978	10,217	10,414
Nigeria	10,867	10,344	10,297	9,295	9,941
South Korea	10,294	9,899	9,319	8,266	9,890
Malaysia	9,450	9,782	9,215	8,217	9,386
Morocco	9,227	9,572	8,890	7,712	8,055
Japan	7,672	7,396	8,114	7,664	7,591
Canada	7,193	7,267	8,083	7,208	7,236
Mexico	6,924	6,810	7,584	7,035	7,187
Saudi Arabia	6,468	6,377	6,356	7,034	6,687
Pakistan	6,128	5,890	5,923	6,965	6,677
Thailand	5,586	5,787	5,854	6,456	6,490
Colombia	5,543	5,771	5,835	5,876	6,246
Taiwan	5,497	5,377	5,689	5,816	6,078
Vietnam	5,338	4,969	5,031	5,475	5,751
Others	109,833	115,665	117,548	124,563	127,840
Total	412,678	422,651	470,256	438,385	460,694

Source: Eurostat

Table 10: Number of permits issued for study reasons by Member State

MS/Year	2013	2014	2015	2016	2017
EU-28	412,678	422,651	470,256	438,385	460,694
UK	183,197	177,234	229,097	170,943	179,633
FR	62,988	65,201	70,250	73,865	80,566
DE	36,862	40,388	13,475	37,297	39,546
ES	25,863	27,924	31,170	33,700	37,531
PL	16,853	22,862	29,764	21,256	21,579
NL	12,507	12,347	14,925	15,950	16,873
IE	9,325	10,653	8,001	11,342	13,519
HU	5,448	5,139	5,807	7,821	10,779
SE	6,480	7,823	8,353	8,363	9,620
DK	6,022	6,330	7,307	8,111	7,936
BE	5,468	5,794	5,840	5,718	6,248
FI	5,314	5,528	5,756	6,235	5,094
CY	846	806	1,703	3,228	4,861
PT	3,971	2,823	2,727	3,353	4,057
AT	4,604	5,359	6,009	4,875	3,876
RO	3,303	3,145	3,788	3,967	3,817
NO	3,130	3,325	3,428	3,087	3,578
CZ	2,294	2,516	5,484	5,668	2,934
IT	16,201	15,042	14,195	8,542	2,893
SK	694	947	1,294	1,509	1,729
LV	772	1,030	1,095	1,287	1,566
SI	300	500	910	1,318	1,344
BL	935	911	874	1,067	1,267
EE	434	698	846	946	1,072
LT	542	607	678	850	898
HR	179	308	296	416	472
LU	153	209	214	205	372
MT	170	174	117	256	326
EL	953	353	281	297	286

Source: Eurostat, extracted on 10 April 2019.

Table 11: Administrative fees for international students charged by immigration authorities, HEI, and other fees

Member State	Range of administrative fees charged by immigration authorities / euros	Range of administrative fees charged by public HEI /euros	Other administrative fees
AT	min. 160 (application and issuance of permit)	19.20 (student union fee per semester applies to all students) e.g. 50 (enrolment fee, depending on HEI, applies to all students)	
BE	204 (application) 21 (issuance of the permit)	N/A	
BG	ca. 23 – 155 (issuance of permit)		
CY	85.43 (visa) 34.17 (residence permit)	N/A	N/A
CZ	19 (accepting an application) 39 (the residence card)	0 – 200	
DE	75 (visa permit) 100 (residence permit)	250 (on average per semester)	75/30 (fee for first/each additional desired course of study for applications via 'uni-assist', an association supported by roughly 180 HEIs which pre-evaluates international applications.
EE		0 – 120 (enrolment fee)	
EL	N/A	N/A	N/A
ES	60 (visa)		
FI	300 (electronic application) 360 (paper application)	e.g. 116 (student union membership fee, depending on HEI)	
FR	60 (visa) 79 (residence permit)	90 (Student and campus life contribution). All other fees are included in the tuition fees	
HR		approx. 50 (enrolment fee)	
HU	60 (residence permit)	100 – 200 (enrolment fee) 60 – 300 (per semester)	
IE	60 (visas) 300 (residence permit)	max. 3000 (per year)	
IT	40 (residence permit for up to one year) 50 (residence permit for up to two years) 100 (min. three years) No fees (short-stay visa) 50.00 (long-term visa) 116.00 (for other visas) 16 (official stamp) 30 (forwarding services) 30,46 (electronic document)	max. 20% of the funding the HEI receives from the state	120 – 200 (regional tax)
LT	86 (application for residence permit) 172 (fast-track application) 28 (issuance of permit) 60 (visa)		
LU	35 – 50 (visa) 80 (residence permit)		75 – 125 (fee for registering higher education diplomas in the register of certificates of academic education)
LV	60 – 120 (visa) 70 – 400 (residence permit)	100 – 150 (enrolment fee)	Approx. 75 library deposit in some HEI
MT	27.50 (e-residence permit)	25 – 95 (eapplication fee)	
NL	192 (application residence permit)	Fee for processing application in case student pays tuition fees in instalments	
PL	ca. 79 (application) ca. 12 (issuance of permit)	min. 50	
PT	ca. 75 (visa) ca. 90 (issuance residence permit)		
SE	ca. 95 (residence permit)	ca. 85 (enrolment fee)	
SK		max. 117,50 EUR ¹⁸⁵ (enrolment fee)	
UK	ca. 400 (application)		Ca. 174 (access to healthcare)

185 The amount of max. enrolment fee for the school year 2019-2020.



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EMN website www.ec.europa.eu/emn

EMN LinkedIn page <https://www.linkedin.com/company/european-migration-network/>

EMN Twitter <https://twitter.com/EMNMigration>

EMN National Contact Points

Austria www.emn.at

Belgium www.emnbelgium.be

Bulgaria www.emn-bg.com

Croatia www.emn.hr

Cyprus www.moi.gov.cy

Czech Republic www.emncz.eu

Denmark https://ec.europa.eu/home-affairs/what-we-do/networks/european_migration_network/authorities/denmark_en

Estonia www.emn.ee

Finland www.emn.fi

France <https://www.immigration.interieur.gouv.fr/Europe-et-International/Le-reseau-europeen-des-migrations-REM3/Le-reseau-europeen-des-migrations-REM>

Germany www.emn-germany.de

Greece <http://emn.immigration.gov.gr>

Hungary www.emnhungary.hu

Ireland www.emn.ie

Italy www.emnitalyncp.it

Latvia www.emn.lv

Lithuania www.emn.lt

Luxembourg www.emnluxembourg.lu

Malta <https://homeaffairs.gov.mt/en/mhas-information/emn/pages/european-migration-network.aspx>

Netherlands www.emnetherlands.nl

Poland www.emn.gov.pl

Portugal <http://rem.sef.pt>

Romania www.mai.gov.ro

Slovakia www.emn.sk

Slovenia www.emm.si

Spain <http://extranjeros.empleo.gob.es/en/redeuropeamigracion>

Sweden www.emnsweden.se

United Kingdom https://ec.europa.eu/home-affairs/what-we-do/networks/european_migration_network/authorities/united-kingdom_en

Norway www.emnnorway.no