

STUDY
IN EUROPE \

Analysis of trends in international student mobility

2026 edition



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Foreword of the Executive Vice-President of the European Commission for Social Rights and Skills, Quality Jobs, and Preparedness, Roxana Mînzatu



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Europe's competitiveness increasingly depends on its capacity to attract, develop, and retain the skills and talent that drive innovation. As highlighted in the Draghi Report on European competitiveness, our Union must overhaul its approach to skills, making it more strategic, future-oriented, and responsive to emerging shortages.

This is the precisely the ambition of our **Union of Skills**. By integrating education at all levels, labour mobility, talent attraction, and innovation into a single strategic framework, the Union of Skills seeks to ensure that Europe has the workforce it needs for the digital and green transition, for technological leadership, and for long-term prosperity. It aims to strengthen Europe's capacity to welcome skilled learners, researchers, and innovators from all over the world, while ensuring that everyone in Europe has the opportunity to acquire the right skills at the right time.

This report contributes to the Union of Skills' vision. Developed under the EU-funded *Study in Europe initiative*, it provides an analysis of international student mobility trends over the past decade (2013–2022). The findings show that the Study in Europe

region, which includes EU Member States and the six countries associated with the Erasmus+ programme, has emerged as the world's leading study destination. At the same time, the data highlight the growing global competition for skills, with Europe facing both established destinations such as the United States, United Kingdom, Australia, and Canada, as well as rapidly rising emerging hubs. These trends are further shaped by evolving policy contexts worldwide, including visa regimes, post-study opportunities, and national strategies for attracting international talent.

Understanding these dynamics is essential for designing policies that make Europe not just a destination of choice, but also a place where international students can contribute meaningfully and shape their futures. Mobile learners enrich our universities, support labour market needs, and foster cultural exchange, playing a critical role in Europe's capacity for innovation and growth.

In a world where skills determine economic strength, Europe must step up its efforts to attract, develop and retain talent. In close cooperation with Member States and higher education institutions, the Union of Skills will continue to strengthen Europe's position as a leading global hub for learning, research, and talent.

Roxana Mînzatu

Executive Vice-President of the European Commission for Social Rights and Skills, Quality Jobs, and Preparedness

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Executive summary

This report, produced within the scope of the **European Union (EU)-funded Study in Europe initiative**, presents an analysis of international student mobility trends over a 10-year period. The primary focus is on the **Study in Europe region**, which comprises the 27 EU Member States and six third countries associated to the Erasmus+ programme: Iceland, Liechtenstein, North Macedonia, Norway, Serbia, and Türkiye.¹ The analysis draws on data from national and international sources, including the UOE (UNESCO, OECD, Eurostat joint data collection) and the European Commission Erasmus+ data.

Context and purpose

In the period covered by this report (2013–2022),² the movement of students across borders has been influenced by major global events including the Syrian civil war, Russia's annexation of Crimea,³ Brexit, and the COVID-19 pandemic. By analysing the development of student flows to and from the Study in Europe region as a whole, rather than only at the country level, this report offers a unique perspective that supports evidence-based policy-making and strategic planning at the European level.

A key aim of the report is to assess the region's **competitiveness** in attracting international talent, particularly in comparison to other major host countries, such as the United States of America (USA), United Kingdom (UK), Australia, and Canada, (also known as 'the big four'), taking into account both mobility trends and the policy environments that shape them.

Talent attraction is central to the EU's **Union of Skills strategy**, reflecting the need to address labour shortages and boost innovation in order to support EU growth and development. By positioning Europe as a leading destination for skilled third-country nationals, researchers, and students, the EU aims to strengthen its global competitiveness in strategic sectors and frontier technologies.

The European Commission has proposed a new target for the Union of Skills: by 2030, the annual number of learners from outside the EU obtaining a degree at tertiary level in the EU should be at least 350,000.⁴ According to the latest available data, the EU had 249,340 inward mobile tertiary graduates coming from non-EU countries in 2023, reflecting an increase of 18% between 2020 and 2023, and a positive trajectory towards the proposed EU-level 2030 target of 350,000.⁵

1 In accordance with Article 19 of the Erasmus+ Regulation, the following third countries are associated to the Erasmus+ programme for the 2021–2027 programme period: Norway, Iceland and Liechtenstein (members of the European Free Trade Association (EFTA) and the European Economic Area (EEA)), and North Macedonia, Republic of Türkiye and Republic of Serbia (acceding countries, candidate countries and potential candidates). It is planned that as of 2027, the United Kingdom and Switzerland will become associated to the Erasmus+ programme.

2 Academic years 2012/13 to 2021/22. The analysis was finalised before the international data for 2022/23 became available.

3 While there is no fixed reference date for the international student mobility data, most reporting countries count their enrolled students near the beginning of the academic year. The period covered by this report is therefore likely to pre-date 24th February 2022, the official start of Russia's war of aggression against Ukraine.

4 The Union of Skills target is based on the EU-27 only and refers to the number of students graduating in a given year. This report has a broader geographical scope (Study in Europe region) and focuses on all incoming degree student enrolments.

5 See <https://data.europa.eu/doi/10.2766/2221794>

Overall benefits of student mobility

International student mobility is associated with benefits at multiple levels:

- **For students:** Enhanced skills, intercultural competencies, global citizenship, personal development, and career prospects.
- **For Higher Education Institutions:** Enriched learning environments, increased diversity, and strengthened international cooperation.
- **For society:** Significant economic contribution through tuition fees, living expenses, and participation in the labour market. Based on available data from a limited number of countries, the employment rate among migrants who arrived for education (i.e., former international students) five years after entry is at least equal to or higher than that of the native-born population in most countries. Mobile students also help address demographic challenges, provide specialised skills to key sectors, and foster cross-cultural understanding, supporting the UN Sustainable Development Goals through inclusivity and international collaboration.

Global student mobility flows reach a new record in 2022

In 2022, **global student mobility** reached new heights, with **6.9 million tertiary education** students enrolled in degree programmes abroad, representing **3% of the global tertiary student population**. This marks a **61% increase over the previous decade**, notwithstanding a temporary decline in 2021 due to the COVID-19 pandemic.

Asia remains the leading continent of origin, followed by Europe. **China and India contribute the largest shares** of mobile degree students worldwide, and the majority of them opt for **English-speaking destinations** like the USA and the UK. The **European continent remains the most popular destination continent overall**, followed by Asia, which recorded the fastest 10-year growth of any continent. Degree-seeking mobility from Latin America and the Caribbean, Asia, and Africa increased rapidly in the 10 years to 2022; we can therefore expect students from these continents to account for a growing and predominant share of global degree-seeking mobility.

Market leader: Study in Europe region hosts largest share of international students

The 10 years to 2022 saw significant shifts in the major flows of international degree students. **Between 2013 and 2018, the global higher education market was led by the USA**. However, the **Study in Europe region recorded consistent year-on-year growth**, and in 2019 overtook the USA as the largest destination market for international students from the rest of the world. Since 2019, the Study in Europe region has maintained a leading position in the global higher education market, hosting approximately **26% of all internationally mobile degree students from outside the region** in 2022.

Among its main competitors are the ‘big four’ English-speaking destinations – the USA, the UK, Australia, and Canada. While the absolute number of mobile students has grown significantly over the past decade, the relative market shares of these major destinations remained largely stable. The notable exception is the USA, whose share of the market declined from 27% in 2013 to 17% in 2022.

Study in Europe region receives four times more degree-mobile students than it sends out

In 2022, the Study in Europe region **hosted 1.24 million incoming degree students from the rest of the world, while 300,000 of its own students pursued a degree outside of the region**. Incoming mobility to the region **more than doubled** since 2013, while outgoing mobility increased by just 9%. Notably, incoming student numbers to the Study in Europe region continued to rise during the pandemic years, in contrast to the decline in outbound flows. The USA and Canada saw a comparable negative effect of COVID-19 on outgoing degree mobility, while the volume of outbound students from Australia and the UK remained stable.

Most outbound degree students from the Study in Europe region choose anglophone destinations

Two thirds of all degree-mobile students from Study in Europe countries **remain within the region**, facilitated by free movement within the Schengen Area and the common infrastructure provided by the European Higher Education Area. Among those studying outside the Study in Europe region, the United Kingdom remained the top destination in 2022 (44%), although its share has decreased since Brexit. The UK is followed by the USA (19%) and Switzerland (15%). The number of outgoing degree students enrolled in Bachelor's programmes was more than double the number in Master's programmes in 2022.

Three-quarters of international degree students in the Study in Europe region originate from Asia and Africa

Incoming degree mobility to the Study in Europe region originates predominantly from **Asia and Africa**, which together accounted for about **75%** of the total in 2022. The top three countries of origin for incoming degree mobility to the Study in Europe region are:

- China: ~100,000 incoming degree students in 2022; 36% growth since 2013; Study in Europe region hosts 10% of all Chinese mobile students worldwide.
- Syria: ~75,000 incoming degree students in 2022; 15-fold increase since 2013 linked to the Syrian civil war; Study in Europe region hosts 80% of Syrian mobile students worldwide, with Türkiye the major host country.
- India: ~70,000 incoming degree students in 2022; 5-fold increase since 2013; Study in Europe region hosts 12% of Indian mobile students worldwide.

In addition, Ukraine holds fourth place, with 61,000 incoming degree students in the Study in Europe region in 2022, although these data do not yet reflect the impact of Russia's war of aggression.

The USA and the UK are respectively 11th and 13th countries of origin for incoming degree mobility to the Study in Europe region.

Three out of four incoming students to the Study in Europe region originate from middle-income countries

Middle income countries accounted for **77% of all incoming degree students** to the Study in Europe region in 2022, with **lower-middle-income countries** the largest group (**42%**), led by India, Ukraine, and Morocco. Students from **upper-middle-income countries** – led by China – make up **35%** of the total. A further 13% of incoming degree students come from low-income countries, almost half of them from Syria. **High-income countries** (notably the USA, UK, and Switzerland) contribute the remaining **10%**. Compared to

the higher income levels, low and lower-middle-income countries of origin showed the fastest growth since 2013, signalling progress towards broader participation in international student mobility.

Germany, France, Poland, Spain, and Italy are the top destinations for incoming degree students in the EU

Within the EU, **Germany, France, Poland, Spain, and Italy** host the largest number of international students from outside the Study in Europe region. Of the major EU host countries, Poland experienced the fastest relative growth (+266%) between 2013 and 2022, partly driven by the inflow of Ukrainian students. Slovakia, Estonia, Slovenia, Latvia, and Hungary are also among the top-10 fastest growing destinations, as policies on internationalisation, talent attraction, and graduate employability have gained traction in some parts of Central Europe and the Baltic countries.

STEM fields: top choice for mobile students in the EU, highlighting strategic focus on innovation and skills

In 2022, **Science, technology, engineering, and mathematics (STEM) fields** attracted the largest share of degree-mobile students in the EU (32%; including intra-EU mobility), significantly more than the 25% share among non-mobile students. Business, Administration, and Law (23%) and Health and Welfare (14%) followed as popular choices, while Social Sciences, Journalism, and Information accounted for 11%. STEM is the dominant sector in most EU countries, with peaks in Germany (51%), Finland (46%), and Sweden (46%), underscoring the EU's strategic focus on attracting international STEM talent to boost innovation and competitiveness. Among the other major destinations for which data are available, only Canada exceeds the EU in terms of the percentage of its international enrolments in STEM fields (41% in 2022).

Credit mobile students account for less than a quarter of total incoming mobility in countries surveyed

Credit mobility refers to a non-degree, short-term study period abroad, including Erasmus+ and other mobility programmes. Among the four countries with comprehensive national data examined – Germany, France, Spain, and Finland – credit-mobile students accounted for 7–25% of all international incoming students. The share of these students from outside the Study in Europe region varies considerably, from 22% in Finland to over 60% in France.

Incoming students represent nine out of ten international credit mobilities under Erasmus+

An analysis of the EU-funded International Credit Mobility (ICM) action from call 2022 reveals strong participation amongst incoming students from countries outside the Study in Europe region, amounting to 90% of all realised student mobilities. ICM brought students from 117 countries to the Study in Europe region under the 2022 call, with Ukraine leading by a wide margin (14%; 2,137 mobilities). This highlights the effectiveness of special arrangements for Ukrainian students, which include flexible procedures and additional funding. Germany was the top destination (2,632 mobilities), followed by Spain, France, Italy, and Poland, which together hosted more than half of all incoming ICM students. The predominant level of study of incoming ICM participants is Bachelor (59%), followed by Master (29%), with 12% at Doctoral level. A study period (90%) was by far more popular than a traineeship amongst these students. One-third (33%) of incoming credit mobilities to the Study in Europe region were in STEM disciplines (Engineering, ICT, and Natural Sciences), underscoring Europe's strong global standing in research, technology, and innovation.

Global policy shifts and COVID-19

The evolution of incoming student mobility to the world's leading study destinations has been shaped by a combination of **national policy settings, geopolitical developments, and global disruptions**. Policies on study migration and post-study work opportunities have played a key role in either facilitating or constraining student flows. Events such as Brexit have also influenced mobility patterns: following the loss of home-fee status for EU students, UK universities saw a decline in EU enrolments and have increasingly focused on recruiting non-EU students.

The COVID-19 pandemic had a marked yet uneven impact across countries, depending on the stringency and duration of national restrictions. There is no evidence that degree mobility to the Study in Europe region as a whole suffered in this period, suggesting that travel restrictions in Study in Europe countries were generally less stringent than those in other major destinations. This resilience also highlights the capacity of European universities to adapt to unprecedented challenges through measures such as hybrid learning, flexible visa rules, and targeted financial assistance.

Looking ahead: emerging markets and future trends

The international student mobility landscape is entering a period of transition. The 'big four' English-speaking destinations – the USA, the UK, Australia, and Canada – are tightening their study migration policies in response to growing concerns over housing shortages, infrastructure capacity, and visa system integrity, as well as a changing political climate. In the USA, sweeping measures have been introduced under the current administration, including visa bans, social media screening, and enhanced vetting, which are projected to lead to 30–40% fewer international enrolments in 2025/26.

These developments are expected to have ripple effects across the global higher education sphere. As incoming mobility to the USA contracts and other English-speaking countries adopt more restrictive policies, opportunities will emerge for alternative destinations to expand their influence. The Study in Europe region, while currently performing strongly as a leading global destination, is likely to face increased competition for international talent from emerging education hubs in Asia. Among the fastest growing markets are the United Arab Emirates, Malaysia, South Korea, and Japan.

On the demand side, the global pool of mobile students is expected to approach 9 million by 2030, with China and India remaining dominant sources alongside fast-growing markets like Vietnam and Indonesia. Affordability and post-study work opportunities now outweigh academic reputation as key pull factors, underscoring the importance of competitive visa and labour market policies.

While the full impact of these shifts will take time to materialise, they signal a potential rebalancing of global student mobility patterns in the years ahead. This presents opportunities for the Study in Europe region to further consolidate and strengthen its position as a leading global study destination, attracting talent from around the world and contributing to the EU's Union of Skills.

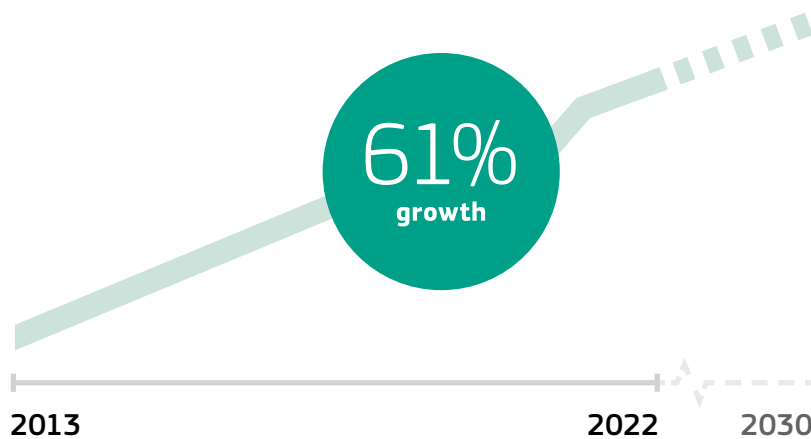
Analysis of trends in international student mobility

Global degree mobility

6.9 million*

tertiary degree students studied abroad **globally** in 2022, including mobility within regions (3% of global tertiary student population)

9 million
expected



#1

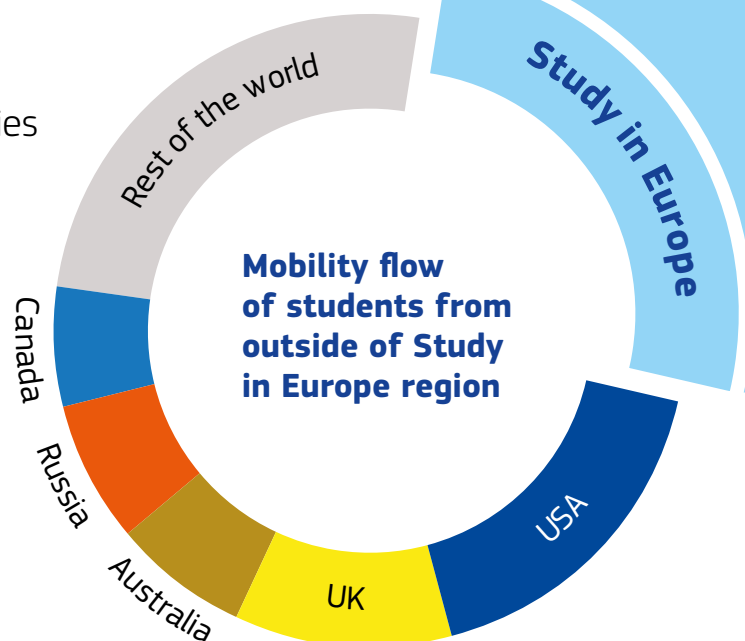
**global study
destination
since 2019**

Accounts for over 25% of the global market for degree students from outside the Study in Europe region

Strong and diverse academic offer and welcoming student environment across 33 countries.

Study in Europe region (33 countries)

27 EU Member States + 6 countries associated to Erasmus+ (Iceland, Liechtenstein, North Macedonia, Norway, Serbia, and Türkiye)



*This figure also includes students with missing destination or origin data. The sample for this analysis is based on the subset with known destination and origin, totaling 5.7 million. Of these, around 864,000 originate from the Study in Europe region. 1.24 million students from the remaining 4.8 million decided to study in the Study in Europe region.

**Percentages based on EU27 only and include intra-EU mobility.

1.24 million

incoming degree students from outside
the Study in Europe region in 2022

Twice as many as in 2013

Who are the students?

75%

of all incoming students
from **Asia** or **Africa**

3/4

incoming students
from middle-income
countries

Where do students go?

Other Study
in Europe
destinations

554K

What do students study?**



32%

of mobile students
in STEM disciplines



23%

Business,
administration & law



13%

Health & welfare

Germany

264K

Poland

71K

France

222K

Spain

63K

Italy

64K

Study in Europe remains attractive to its own talent

Two thirds of mobile students (about
565,000) **from** the Study in Europe region
choose to study within the region.

1. Introduction

How many tertiary education students worldwide are internationally mobile? Which countries send and receive the most mobile students? How competitive is the Study in Europe region relative to other study destinations and how has its market share developed over the last 10 years? What are the preferred study fields of mobile students? Which European students are most likely to pursue tertiary education outside of Europe and at what level?

These are among the many questions addressed in this report, which was commissioned by the European Commission and the European Education and Culture Executive Agency (EACEA) under the current Study in Europe contract (see **Box 1**). The report presents an analysis of trends in international student mobility between 2013 and 2022, based on the latest available data from national and international sources.⁶ There is a special focus on mobility to and from the Study in Europe region, which comprises the 27 European Union (EU) Member States and six third countries associated to the Erasmus+ Programme for the 2021–2027 programme period: Iceland, Liechtenstein, North Macedonia, Norway, Serbia, and Türkiye.

International student mobility between 2013 and 2022 took place against a backdrop of conflict and civil unrest, climate emergency, escalating geopolitical tensions, and a global public health crisis. Civil war raged in Syria throughout the decade, forcing millions of its citizens to seek refuge in Europe. In 2014, Russia's annexation of Crimea marked the start of an on-going conflict along Europe's eastern border. Among other major events that shifted the geopolitical landscape were the more restrictive talent attraction and visa policies in the United States of America (USA) and the United Kingdom (UK)'s withdrawal from the EU in 2021. Finally, the early 2020's were profoundly shaped by the COVID-19 pandemic and the economic downturn that accompanied it.

The primary objective of this report is to map 10 years of student mobility between the Study in Europe region and the rest of the world. Whereas international student mobility data is typically reported at the country level, this report offers a new perspective by analysing the long-term development of student flows to and from the Study in Europe region as a whole (as well as to its constituent countries). The insights generated are thus highly relevant for policy-making and higher education promotion strategies at the European level.

In response to growing global competition and demographic decline, the European Commission set out a strategic vision in 2025 to strengthen the EU's competitiveness through human capital – the **Union of Skills** initiative.⁷ A key pillar of this vision is talent attraction, which aims to **position Europe as a global magnet for skilled professionals, researchers, and students**. By enhancing education and research infrastructure, streamlining visa and recognition processes, and promoting inclusive labour mobility, the EU seeks to **attract and retain top talent from third countries**. This approach supports innovation, addresses labour shortages, and reinforces Europe's role as a leader in strategic sectors such as STEM and frontier technologies.

In line with these overarching EU objectives, the Study in Europe initiative aims to attract talented students from around the world to pursue tertiary education in the region. Given the high level of demand for international talent, it is important to be able to assess the competitiveness of European tertiary education in relation to other major study destinations such as the USA, the UK, Australia, and Canada. This analysis considers both mobility trends in these leading host countries and the policy developments underpinning them.

6 This analysis covers the period from 2013 up to and including 2022. The analysis was finalised before the release of the 2023 international data in September 2025.

7 Communication from the Commission to the European Parliament, the European Council, the Council, the European Economic and Social Committee and the Committee of the Regions. The Union of Skills (March 2025). eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX%3A52025DC0090

At a global level, student mobility flows are highly influenced by macro-economic factors (British Council, 2024a). Students from low-income countries are less likely to pursue tertiary education abroad due to financial, structural and administrative barriers (OECD, 2024b). Promoting equitable participation in (international) education is high on the EU's agenda, with initiatives such as the Erasmus+ programme aiming to broaden access to mobility opportunities.⁸

Box 1. Study in Europe

Study in Europe is an EU-funded initiative, contracted by the European Commission and the European Education and Culture Executive Agency for a period of three years between May 2024 and May 2027. Its core objectives include elevating the global profile of European higher education, enhancing the promotional expertise of national promotion agencies and higher education institutions (HEIs), and boosting the accessibility and awareness of European higher education opportunities among a diverse range of stakeholders. Key activities include the organisation of European higher education study fairs, institutional events, networking and capacity building activities for promotion agencies, the management of the [Study in Europe portal](#), communication on social media, and the production of analyses and studies on European higher education and international mobility trends.

Literature review: The benefits of international student mobility

International student mobility is a key component of the broader process of internationalisation in education. A previous literature review conducted by Nuffic (2020) categorised the added value of internationalisation across three levels: **the student (micro-level)**, **higher education institutions (meso-level)**, and **society (macro-level)**. This framework provides a lens through which the benefits of student mobility can be examined, ranging from individual skill development to institutional innovation and wider societal impact. This literature review adopts the Nuffic framework to explore existing research on the advantages of student mobility across these three levels.

Benefits for students

International mobility can offer significant benefits for the individual students. Participating in an international experience enables students to develop a range of international competences, including intercultural competences, international orientation, and personal development (Nuffic, 2019). Furthermore, it can have an impact on their career opportunities.

Several studies have shown that studying abroad – whether short- or long-term- fosters the development of **intercultural competences** (for a comprehensive literature review, see Wang and Shen, 2024). For example, it can improve **intercultural awareness** (Chieffo and Griffiths, 2004), **cross-cultural sensitivity** (Anderson et al., 2006) and **intercultural knowledge and communication** (Gao and Kennedy, 2019). Other studies have shown that a longer duration of a study abroad period is associated with increased intercultural competences (Behrnd & Porzelt, 2012; DeLoach et al., 2019).

Students who study abroad also tend to develop a stronger international orientation. For instance, a study involving students from the USA who studied in Japan (Asada, 2019) found increased awareness, interest and connection to the culture of the host country, and a more general understanding and a desire to contribute and connect to the wider world. Similarly, a study among Taiwanese students showed that students with

8 For more information see <https://erasmus-plus.ec.europa.eu/programme-guide/part-a/priorities-of-the-erasmus-programme>

international mobility experiences tend to see themselves as **global citizens** and have stronger agreements toward elements of global citizenship, such as **global awareness** and **global responsibility** (Chang, 2016).

A large-scale study among over 4,000 students about the impact of the **Erasmus+ programme** (Kurver, et al., 2019) investigated whether the students' stay abroad helped them develop different competences related to personal development. The participants reported that during their stay abroad they developed skills like **language proficiency, confidence, flexibility, problem-solving abilities** and **empathy**. A follow-up (Lodwick, 2024) confirmed that, even several years after the experience abroad, the majority of respondents continued to observe positive effects on **personal development**, such as independence and social skills. Furthermore, the majority of respondents also indicated that their international experience had a positive impact on **intercultural competences**, such as knowledge about language, culture and communication, and collaboration in international contexts.

A literature review by Waibel and colleagues (2017) on the career outcomes of mobility found evidence that graduates with a study abroad experience tend to have a higher income in the first stage of their career compared to non-mobile peers. There is evidence that a study abroad experience might be especially beneficial in terms of income for students from lower socioeconomic backgrounds and for women. Another career outcome for students who have studied abroad, is that they are more internationally oriented in their career. For example, in the study on the impact of the Erasmus+ programme (Kurver et al., 2019), almost 70% of the graduates with an experience abroad indicated that they are well-prepared for the international labour market. Finally, internationally mobile students are more likely to gain work experience abroad in their future career, and when they work in the domestic labour market, they are more likely to hold international positions (Samuk et al., 2023).

Benefits for higher education institutions

International students can enrich the academic and social environment of host institutions. First, the presence of international students can benefit the learning experiences of **domestic students** at the institution. An *international classroom* has been shown to foster local students' intercultural competences, especially for those without prior international experience (Hofhuis et al., 2023). Higher education institutions see international students as an integral part of university life. They increase diversity on campus, contribute to social and cultural events, and help other students prepare for life in a globalised world by encouraging the development of a global mindset (Chankseliani, 2018). Another study has shown that domestic students who interacted with international students during their studies reported higher levels of development in a range of areas, such as intellectual development and leadership skills (Luo & Jamieson-Drake, 2013). This finding illustrates that an international classroom can enhance the overall educational environment.

Beyond the classroom, international students support **institutional research and collaboration**. An international community of students creates opportunities for future international partnerships and research collaborations (Chankseliani, 2018). In turn, international research partnerships have been shown to result in more scientific output, which is essential for the competitiveness of research institutions (Kwiek, 2015).

International students can be a substantial source of revenue for higher education institutions (Cantwell, 2019; Chankseliani, 2018; Findlay et al., 2017). However, the relative importance of international students as a source of revenue varies strongly between different countries and institutions and depends on the levels of public funding (Cantwell, 2019; Weber et al., 2024).

Benefits for Society

International student mobility offers both short-term and long-term benefits for the host society, as well as on a global scale.

Short-term contribution

During their studies, international students **contribute to the local economy** by paying tuition fees and living expenses. In several of the major destination countries for international mobility, studies have evaluated the economic contribution of international students during their studies (Table 1).

Table 1. Estimated economic contribution of international students during their studies.

Country	Time period	Contribution Estimate in €	Methodology	Source
France	2022	€1.35 billion	Net contribution analysis including public expenditure.	Campus France, 2022
Sweden	Unspecified	3.5–4 billion SEK €322–370 million	Annual contribution estimate based on student spending.	Swedish Institute, 2022
United Kingdom	2021/22 cohort	£37.4 billion €43 billion	Net benefits calculation: tuition fees, living costs, visitors minus public costs.	London Economics, 2023
USA	Academic year 2022/23	USD 40 billion €37 billion	Economic impact analysis of international student spending.	Okai & Mandayam, 2024
Australia	Academic year 2023/24	AUD 50.5 billion €34 billion	Expenditure analysis: tuition, food, accommodation, transport, health services.	Australian Bureau of Statistics, 2024
Canada	2022	CAD 31 billion €22 billion	GDP contribution estimate from international student spending.	Global Affairs Canada, 2023

Long-term contribution

International students can also **contribute to the national economy and labour market** in the longer term by working and paying taxes, either during their studies or by staying in the country after graduation. A study in Flanders has shown that the net positive benefits of international students exceed the costs by two to three times (De Witte & Soncin, 2021). A study in the Netherlands calculated that the cohort of incoming international degree students in 2021/22 will contribute approximately €1.5 billion to the Dutch economy, which is an average of about €35,000 per international student (Nuffic, 2022). In Sweden, international graduates have contributed between 1.5 and 2.7 billion SEK annually (approximately between €138 and €248 million) in income tax and consumption in the period 2013–2021. They also add several thousand well-educated people to Sweden’s workforce each year (Swedish Institute, 2022). In Estonia, working international students and graduates contributed over €23 million in taxes in the academic year 2022/23. More than half of the international students in Estonia worked at least one day per week during their studies (Statistics Estonia, 2024). The exact financial contribution of international students is largely dependent on national context, the tuition fees for international students, the type of funding they receive, their labour market participation during and after graduation, and their stay rates.

International students make valuable **contributions to society** by bringing specialised skills and personal qualities to the labour market. In countries with limited domestic expertise, particularly in technical fields, international graduates help to expand the talent pool and meet the demand for specialised knowledge (Nuffic, 2025b). Additionally, employers frequently emphasise the advantages of hiring these graduates, such as their diverse perspectives, innovative thinking, intercultural awareness, and multilingual abilities (Johnston et al., 2021; Nuffic, 2025b; Shchegolev et al., 2016; Kukushkin & Watt, 2009). International graduates are widely regarded as motivated and hardworking, and multicultural teams are often associated with enhanced creativity (Fang et al., 2022). Their varied backgrounds also offer country-specific insights that are particularly valuable in international business relations.

Research indicates that many students pursue education abroad not only for personal development but also to make meaningful contributions both locally and globally (Fakunle, 2021; Singh & Jack, 2018). Through international education, they seek to cultivate leadership and other skills that promote cultural exchange and drive social change. Some international students are strongly motivated by a sense of responsibility and a commitment to giving back. As a result, they are eager to use their international learning experiences to improve systems, lead initiatives, and inspire change in their home country, host country, or even a third country (Singh & Jamil, 2021).

In host societies, the inflow of international students can help to address demographic challenges by bringing new young people to areas which face population decline and ageing (Aguiar et al., 2024). This is particularly relevant in Europe, where many countries are facing a demographic transition characterised by an ageing population and a decrease in the share of young people (Eurostat, 2024). Between 2003 and 2023, the share of persons aged 65 and over increased in all EU countries. At the EU level, the increase was from 16% to 21%. Over the same period, the share of young people (between the ages of 0 and 19) decreased in all EU countries. At the EU level, the proportion of young people decreased from 23% to 20%. The demographic transition in Europe has several consequences (European Commission, 2023). An ageing population puts growing pressure on healthcare and pension systems, which can amplify fiscal sustainability challenges. In addition, the declining working-age population increases pressure on the labour market.

On a global scale, internationalisation of education can contribute to several of the Sustainable Development Goals (SDGs) by promoting global citizenship (Ramaswamy et al., 2021). This refers to “a sense of belonging to the global community and a common sense of humanity to generate actions to promote a better world and future through a framework of collective and civic action” (p. 392). Altbach and De Wit (2015) have argued that international cooperation and exchange in tertiary education can promote mutual understanding and peace on a global scale. They state that while international cooperation and exchange are not guarantees for peace and understanding, they are essential mechanisms for communication and dialogue.

2. Methodology

2.1. Degree mobility data

Background

In 2025, the main source of data on global degree-seeking mobility is provided by the UNESCO Institute for Statistics (UIS), the OECD, and Eurostat through their joint UOE data collection.⁹ The UOE (UNESCO/OECD/Eurostat) data collection is an annual exercise, carried out jointly since 1993, that gathers aggregate national education data via approximately 25 electronic questionnaires. These cover a range of indicators including student enrolments, entrants, graduates, academic staff, finances, class sizes, and general population statistics. National statistical authorities complete these questionnaires using available national data, and submit them jointly to the OECD, Eurostat, and UNESCO. Participation in the UOE data collection is mandatory for EU Member States under European regulations.

Limitations

The three organisations collaborate closely on data validation and reviewing new submissions following corrections, using a common methodology to improve comparability across countries and ensuring consistency and quality. However, true comparability remains challenging, as countries differ in how they define and collect data on mobile students. For example, some countries count foreign students rather than international students (see **Glossary**), and some include exchange students while others only account for students enrolled in full degree programmes. As a result, UOE data should be interpreted with caution when making cross-country comparisons. Nevertheless, no alternative source currently offers comparable coverage and consistency.

The lengthy process of collecting and validating international enrolment data means that there is a standard time-lag of about 2.5 years in the supply of UOE data. For example, the UOE data release of September 2024 concerns international student enrolments in the academic year 2021/22. The analysis of international degree mobility in this report is based on UOE student enrolment records for the academic years 2012/13 up to and including 2021/22, which was the latest available year when the data were analysed.¹⁰

Missing data

Not all countries report complete information to the UOE on the mobile students they host each year. In particular, while data on outgoing and incoming mobility are available separately, the totals sometimes do not match because information on either the origin or destination country may be missing. For the purposes of this analysis, we only consider mobility streams where both the origin and destination countries are known. To avoid statistical breaks, the UIS supplements its “World” totals with estimates for countries that usually provide data but are missing in particular years. This explains why the total number of mobile students in 2022 recorded by the UIS (6.9 million) is higher than the totals shown in some of the tables in this publication (5.7 million), which are based only on fully matched origin–destination data.

9 For more information see [UNESCO OECD Eurostat \(UOE\) joint data collection – methodology – Statistics Explained – Eurostat](#)

10 The UOE data release in September 2025 was too late to be incorporated in the current publication.

Reference date

The UOE student mobility data have no fixed reference date, as the date when enrolled students are counted can vary from one reporting country to another. This being said, counting tends to take place early in the academic year. The reference period for UOE student enrolment data is the year in which the academic year ends. For example, the data for 2022 concern the academic year 2021/22.

2.2. Credit mobility data

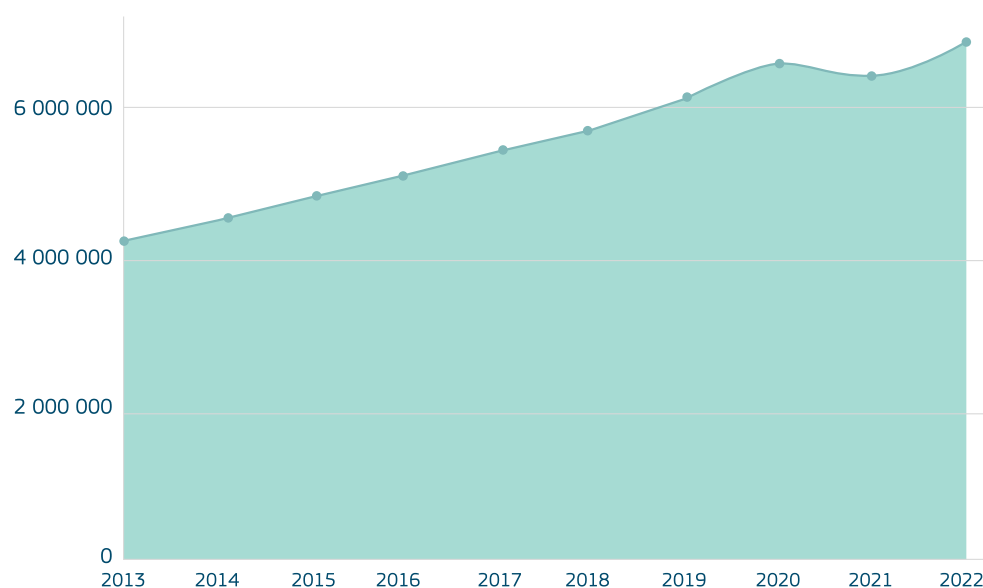
For international credit mobility, no dataset exists with the same global coverage as the UOE dataset for degree mobility. This is partly because credit mobility is more difficult to measure than degree mobility, as students typically spend only a few months at their host institution and do not earn a degree there. As a result, they often fall outside the scope of annual data collection on incoming mobile students, which is generally conducted only once or twice a year.

The analysis of credit mobility in this report makes use of a variety of national and European data sources, which offer insights into credit mobility patterns to and from the Study in Europe region. A description of these data sources can be found in **Chapter 5**.

3. Global degree mobility flows

According to data from the UNESCO Institute for Statistics (UIS), there were 256 million students worldwide in 2022, **6.9 million** of whom were on a **degree-granting mobility scheme** (3%). Between 2013 and 2022, the number of degree-mobile students grew by 61%. This growth in the number of mobile students is not uniform, and disparities exist between continents in terms of both outgoing and incoming mobility. As Figure 1 shows, the COVID-19 pandemic led to a visible decline in overall international degree mobility in 2021. This was a temporary effect, however, as the total number of mobile students in 2022 exceeded pre-pandemic levels.

Figure 1. Development in the number of degree-seeking mobile students worldwide between 2013 and 2022.



Source: UIS, 2025.

3.1. Continents of origin and destination

Table 2 shows the number of incoming degree students per continent of destination in 2022. Host to more than four in ten of all degree-seeking students globally in 2022 (41%), **the European continent is the most attractive destination** for students wishing to pursue a tertiary education programme abroad (including intra-European mobility). Asia follows, with a quarter of all mobile students (25%), while North America (21%) hosted more than one mobile student in five. The number of students choosing Asia more than doubled in the 10 years to 2022 (+116%), whereas Europe and North America experienced growth of 58% and 33% respectively in this period.

Table 2. Destination continents of degree-mobile students worldwide in 2022
(including intra-European mobility).

Rank	Continent of destination	Number of students	%	10-year trend
1	Europe	2,328,696	41.1%	+58.2%
2	Asia	1,421,543	25.1%	+116%*
3	North America	1,187,703	21.0%	+33.4%
4	Oceania	390,095	6.9%	+36.5%
4	Latin America and the Caribbean	230,453	4.1%	+39.7%**
5	Africa	107,249	1.9%	+16.1%
Total		5,665,739	100.0%	+74.0%

Source: UIS and OECD stats, 2025.

Notes: Mobile students for whom the origin or destination country is unknown are excluded from this table.

* The 10-year trend is calculated from data on the number of mobile students in Asia between 2013 and 2022, with the exception of Russia, for which there is no 2013 data, and for which 2014 data was used.

** The trend for Latin America and the Caribbean is calculated over five years between 2018 and 2022, since in 2013 only seven Latin American and Caribbean countries had data available, compared with 12 in 2018 and 13 in 2022.

Table 3 shows the number of degree-mobile students from each continent in 2022. **Asia ranks first** by a large margin, **with 60% of degree mobility worldwide originating from this continent**. Europe is the second most common continent of origin (18%), followed by Africa (12%), Latin America and the Caribbean (8%), and North America (3%). Degree mobility from Asia (+85%), Africa (+83%), and Latin America and the Caribbean (+136%) increased rapidly in the 10 years to 2022, while Europe (+33%), North America (+50%) showed slower rates of growth. We can therefore expect students from Latin America and the Caribbean, Asia, and Africa to account for a growing and predominant share of global degree mobility.

Table 3. Continents of origin of degree-mobile students worldwide in 2022
(including intra-European mobility).

Rank	Continent of origin	Number of students	%	10-year trend
1	Asia	3,382,099	59.7%	+85.2%
2	Europe	1,000,669	17.7%	+33.0%
3	Africa	675,010	11.9%	+82.7%
4	Latin America and the Caribbean	430,404	7.6%	+135.9%
5	North America	156,776	2.8%	+50.0%
6	Oceania	20,781	0.4%	-0.7%
Total		5,665,739	100.0%	+74.0%

Source: UIS and OECD stats, 2025.

Notes: Mobile students for whom the origin or destination country is unknown are excluded from this table.

3.2. Mobility flows between continents

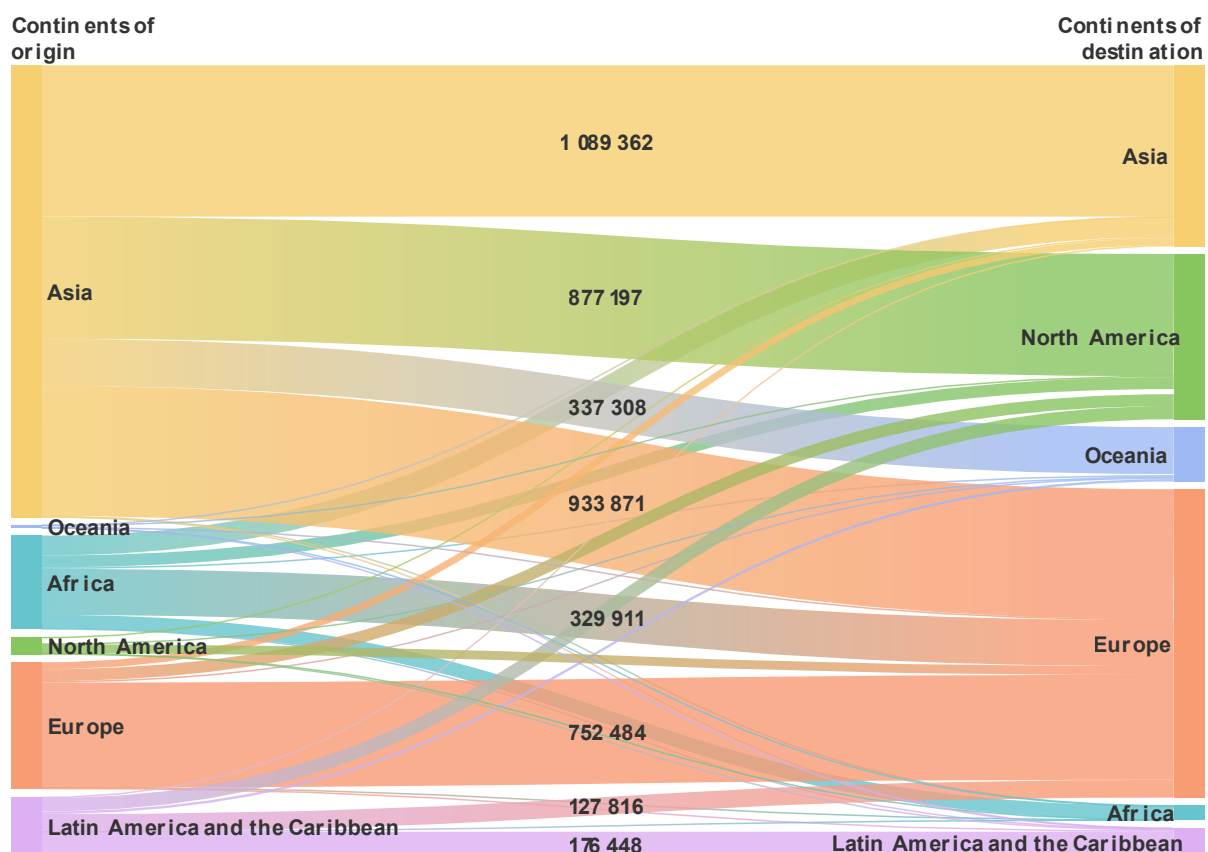
As Figure 2 shows, the main mobility flows are within Asia itself, between Asia and Europe, between Asia and the North American continent, and within the European continent.

Students from the leading continent of origin, Asia, are distributed relatively evenly over three destination continents: Asia itself with 1,090,000 students in 2022 (30% of the total), Europe with 934,000 students (26%), and finally North America with 877,000 students (25%).

Europe is the second continent of origin for mobile students but presents a distinct pattern: 77% of European degree students who go abroad stay within the continent, while only 23% choose another continent. This can be explained by several factors. The free movement within the Schengen area makes travel and living arrangements easier, and the alignment brought about by the European Higher Education Area allows for a consistent degree architecture, mutual recognition of diplomas, transferability of credits obtained from one country to another, and an aligned quality assurance system. The reputation of tertiary education institutions in Europe and the perceived quality of their degrees play a significant role in students' choice of destination. In line with this, **the second most popular destination continent for European students is North America**, renowned for the quality of its degrees and institutions, which feature prominently in international rankings. Additionally, low or no tuition fees for EU/European Economic Area (EEA) students in many countries also make studying within Europe more affordable and attractive.

Students from Africa mainly go to Europe (68%), while those from Latin America and the Caribbean stay on the continent (40%) and go to Europe (29%).

Figure 2. Continents of origin and destination of degree-mobile students in the world in 2022 (including intra-European mobility).



Source: UIS and OECD stats, 2025.

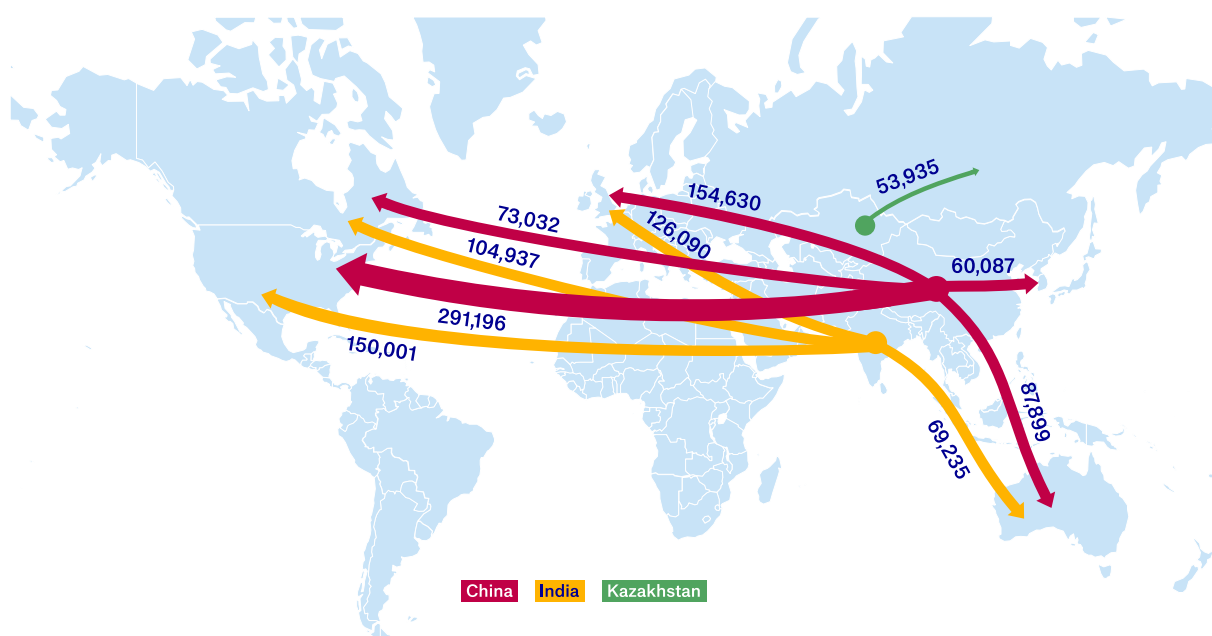
3.3. A country-to-country perspective

In 2022, nine of the top 10 largest flows of degree-seeking mobile students originated from China and India, with five flows from China and four from India. The 10th largest flow was between Kazakhstan and Russia (Figure 3).

Of these top 10 flows of degree-mobile students worldwide in 2022, two were to the USA, two to the United Kingdom, two to Australia, and two to Canada. In each case, the flows originated from China and India. The remaining two flows were to South Korea (from China) and to Russia (from Kazakhstan). Together, these 10 flows accounted for 17% of all student mobility worldwide in 2022.

For comparison, in 2013, six of the world's top 10 largest student flows were from China, and four out of 10 were to the USA. This shows that the USA is gradually being overtaken by other destination countries, since in 2013 it was the only destination country to receive several of the top 10 largest student flows.

Figure 3. Ten largest flows of degree-mobile students worldwide in 2022.



Source: UIS, 2025.

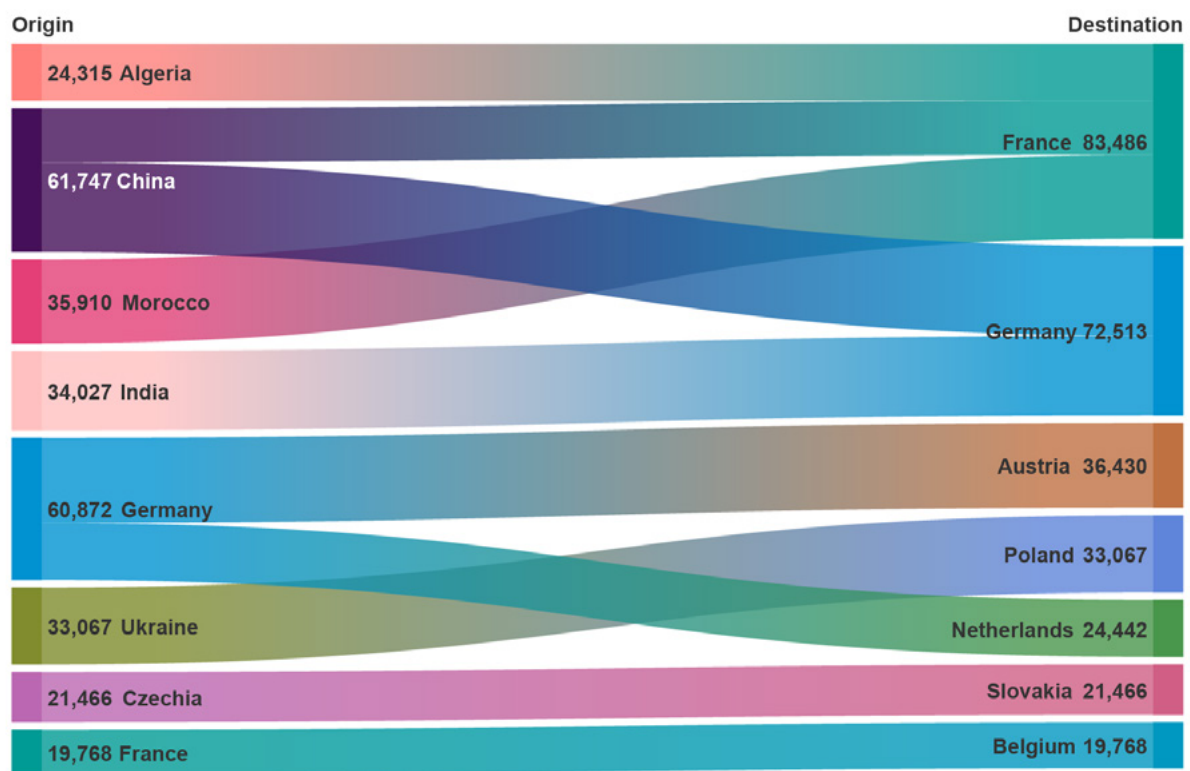
India and China have the largest student populations in the world, with nearly 35 million enrolled on undergraduate programmes in India and 28 million in China in 2022. They are also the top two countries of origin for degree-mobile students globally, with over one million mobile students coming from China in 2022 and over 600,000 from India. In India's case, the reputation and quality of education abroad, and the limited number of places available at prestigious tertiary education institutions in India, also help to explain the large outbound flows.¹¹ Finally, the country's continuing economic growth is enabling more Indian students to go abroad (Campus France, 2025). Outgoing mobility from China is driven by demographics and the development of an urban middle class, but also by the highly selective nature of Chinese tertiary education. The proportion of Chinese students seeking an international degree rose sharply from 7% in 1998 to 17% in 2020. Today, one in six internationally mobile students worldwide is Chinese (Campus France, 2024).

¹¹ India has no institution ranked in the top 200 Times Higher Education Ranking and only five in the top 500.

Aside from South Korea, the main host countries of mobile students from China and India are English-speaking countries where tertiary education is provided in English. In addition, these destination countries have many institutions that appear in international university rankings, which contributes to their attractiveness.

Concerning degree mobility flows to the European Union, France was the destination of three of the 10 most significant flows in 2022, while Germany received two (Figure 4). The remaining five flows went to Austria, Poland, the Netherlands, Czechia, and Belgium (in ascending order of size). Of the 10 largest mobility flows to EU countries, two originated from China and two from Germany. The remainder came from Morocco, India, Ukraine, Algeria, Slovakia, and France (in ascending order of size).

Figure 4. Ten largest flows of degree-mobile students to EU countries in 2022 (including intra-EU mobility).



Source: UIS and OECD stats, 2025.

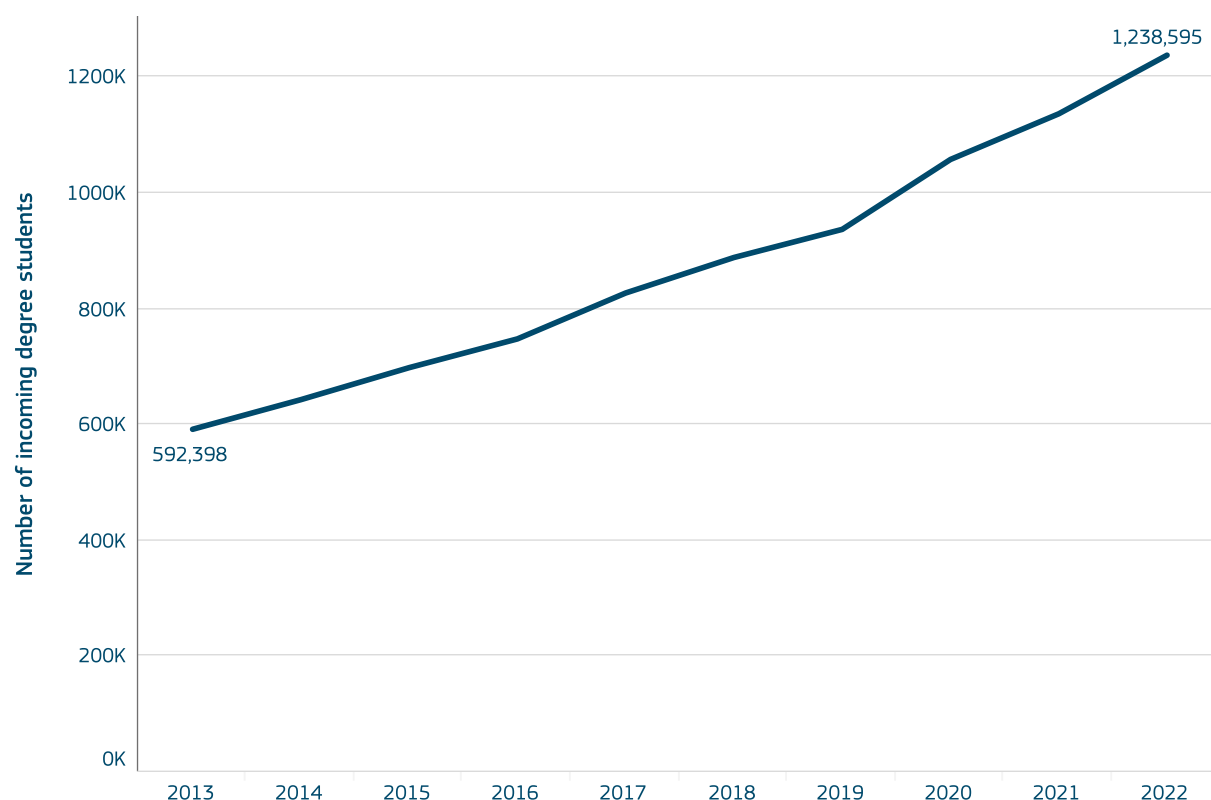
4. Degree student mobility to and from the Study in Europe region

4.1. Incoming degree mobility

The degree mobility analysis is based on international student enrolment data from the OECD and the UNESCO Institute for Statistics (UIS). We determine the total number of degree students only for cases where both the country of origin and the country of destination are known, using data reported by the OECD and supplementing with UIS data where OECD data are unavailable.

The Study in Europe region hosts large numbers of internationally mobile degree students each year. According to the most recent available data, **almost 1.24 million degree students worldwide were enrolled in the Study in Europe region in 2022** (excluding mobile students from within the region). As Figure 5 shows, **incoming degree mobility to the Study in Europe region has more than doubled in 10 years**. Furthermore, this growth does not appear to have been affected by the COVID-19 pandemic, despite the international travel restrictions that were in place between 2020 and 2022. The continued rise partly reflects European universities' capacity to adapt to challenges through measures such as expanding online and hybrid learning and implementing supportive policies during and after the pandemic. These included flexible visa rules and targeted financial assistance (OECD, 2021).

Figure 5. Total incoming degree mobility to Study in Europe region between 2013 and 2022 (excluding mobility from within the Study in Europe region).



Source: UIS and OECD stats, 2025

Note: Mobile students for whom the origin or destination country is unknown are excluded from this figure.

The European Commission's Union of Skills¹² proposes a **new EU-level target** for the number of degree-mobile tertiary graduates from outside the EU. **By 2030**, the aim is that **at least 350,000 non-EU students will graduate from degree programmes in the EU each year**.¹³ The proposed target concerns graduates at all levels of tertiary education. In 2023, this figure was 249,340, reflecting 18% growth since 2020, despite the global disruption caused by COVID-19 (European Commission, 2025). Based on the current growth trajectory, there is a strong chance that the proposed EU level target of 350,000 will be reached by 2030.

4.1.1. Continents of origin of incoming students to the Study in Europe region

In line with the findings in Chapter 3, Asia is the most common continent of origin for international degree students in the Study in Europe region. Students from Asia made up almost half of all international degree students in the region in 2022. A further one quarter of international students in the Study in Europe region were from the African continent, while 160,000 degree students were from elsewhere in Europe (European countries outside of the Study in Europe region).¹⁴ Finally, almost 120,000 international students in the Study in Europe region came from Latin America and the Caribbean in 2022.

The growth in incoming degree mobility to the Study in Europe region over the 10 years to 2022 was largely driven by two continents: Asia and Africa. As shown in Figure 6, **the number of incoming students from Asia increased by 150%** in this period, from 245,000 in 2013 to 610,000 in 2022. At the same time, **degree mobility from Africa to the Study in Europe region more than doubled**, from 150,000 students in 2013 to 310,000 in 2022 (+104%). There was a slower rate of growth in degree student numbers from Europe (+54%), Latin America and the Caribbean (+72%), North America (+70%), and Oceania (+64%).

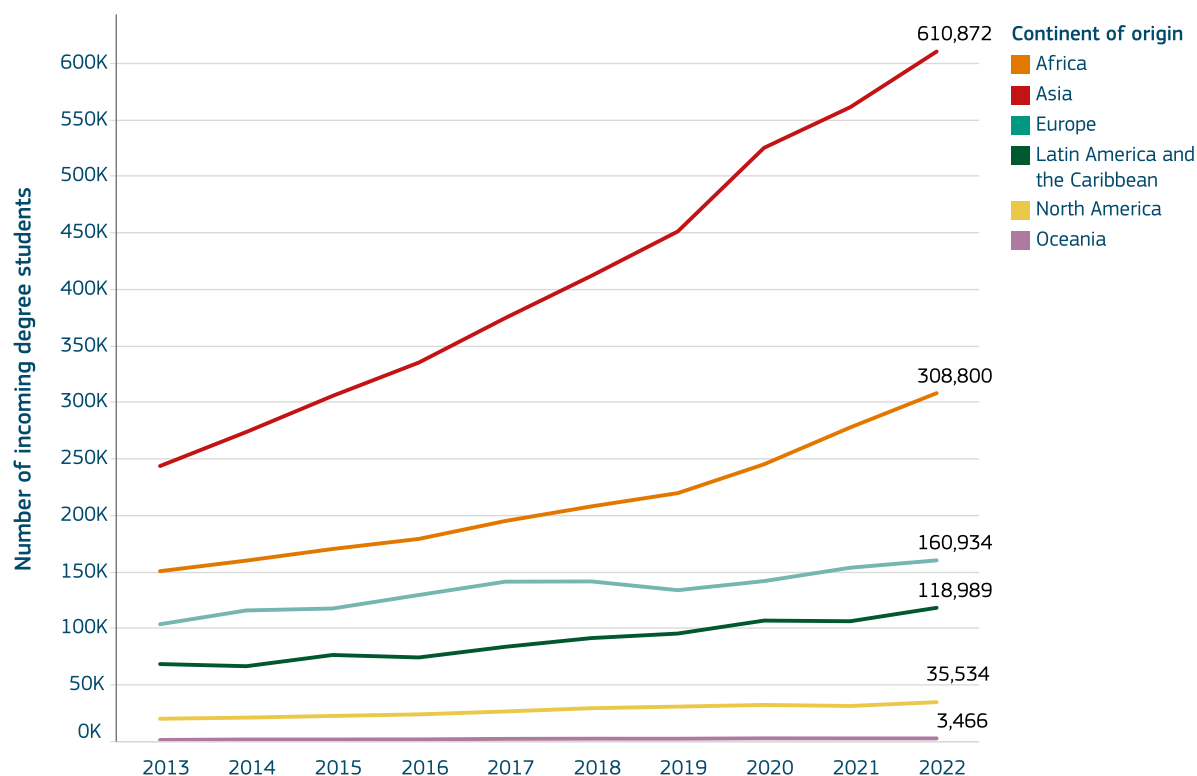
12 See eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX%3A52025DC0090

13 The annual number of graduates differs fundamentally from the total number of tertiary enrolments in a given year (e.g., Figure 5). In addition, the Union of Skills figure concerns EU member states only, whereas the results in this report concern incoming mobility to the Study in Europe region (27 EU Member States, plus the six associated countries to Erasmus+).

14 European countries that are not part of the Study in Europe Region (in alphabetical order): Albania, Andorra, Belarus, Bosnia and Herzegovina, Gibraltar, Kosovo*, Moldova, Monaco, Montenegro, San Marino, Switzerland, Ukraine, United Kingdom, Vatican City.

* This designation is without prejudice to positions on status and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence.

Figure 6. Total absolute incoming mobility to Study in Europe region per continent of origin between 2013 and 2022 (excluding mobility from within the Study in Europe region).



Source: UIS and OECD stats, 2025

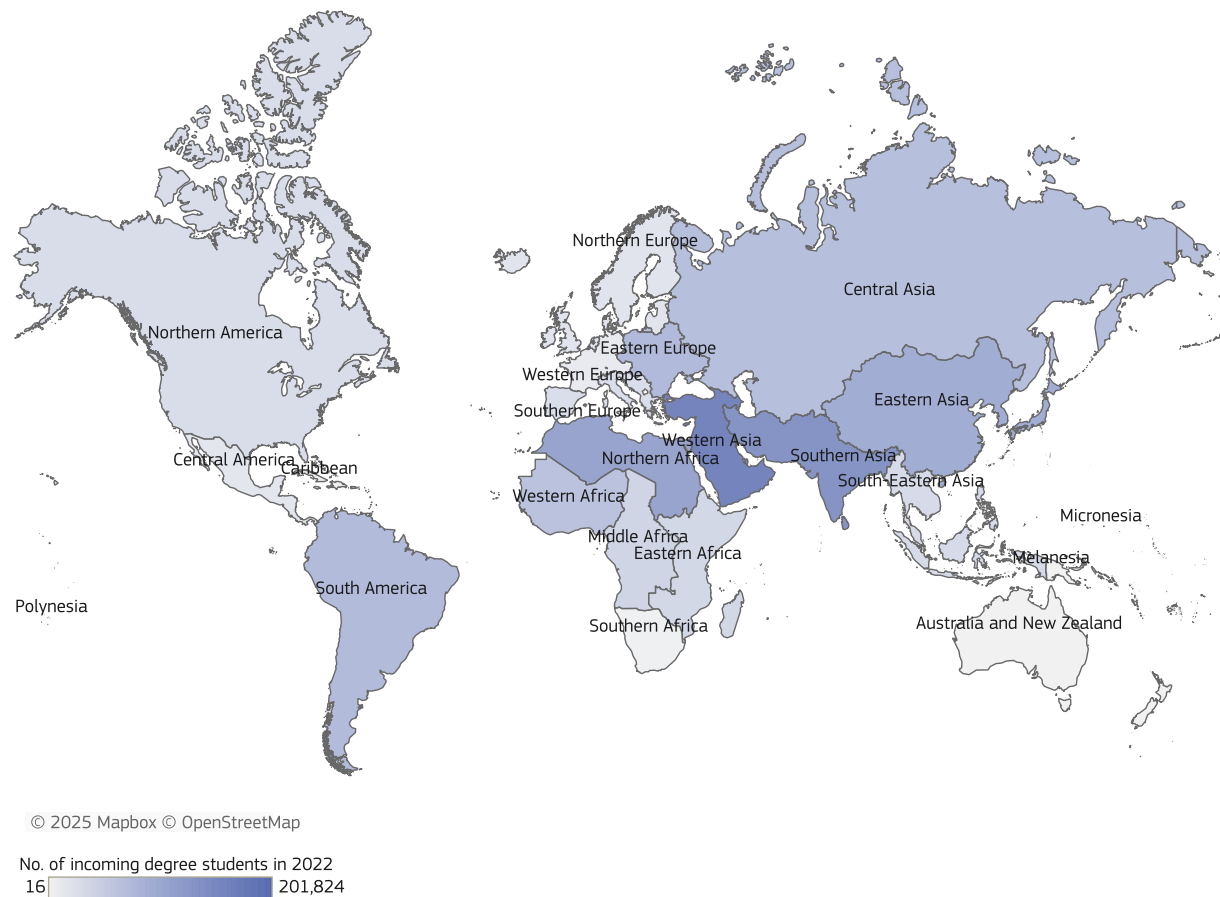
Note: Mobile students for whom the origin or destination country is unknown are excluded from this figure.

The majority of the Asian degree students hosted by Study in Europe countries in 2022 originated from the regions¹⁵ of Western Asia (about 202,000), Southern Asia (about 168,000), and Eastern Asia (about 118,000; Figure 7). Fewer students came from Central Asia (almost 85,000) and South-Eastern Asia (almost 38,000).

On the African continent, the region of Northern Africa sends the most degree-mobile students to the Study in Europe region. In 2022, almost 135,000 students from Northern Africa were studying in the Study in Europe region, while considerably fewer students came from Western Africa (about 79,000) and Middle Africa (almost 48,000).

15 Regions according to the United Nations geoscheme, also used by UNESCO (see **Annex** Table A7 for full list of countries and regions).

Figure 7. Regions of origin of international degree students in the Study in Europe region in 2022 (excluding mobility from within the Study in Europe region).



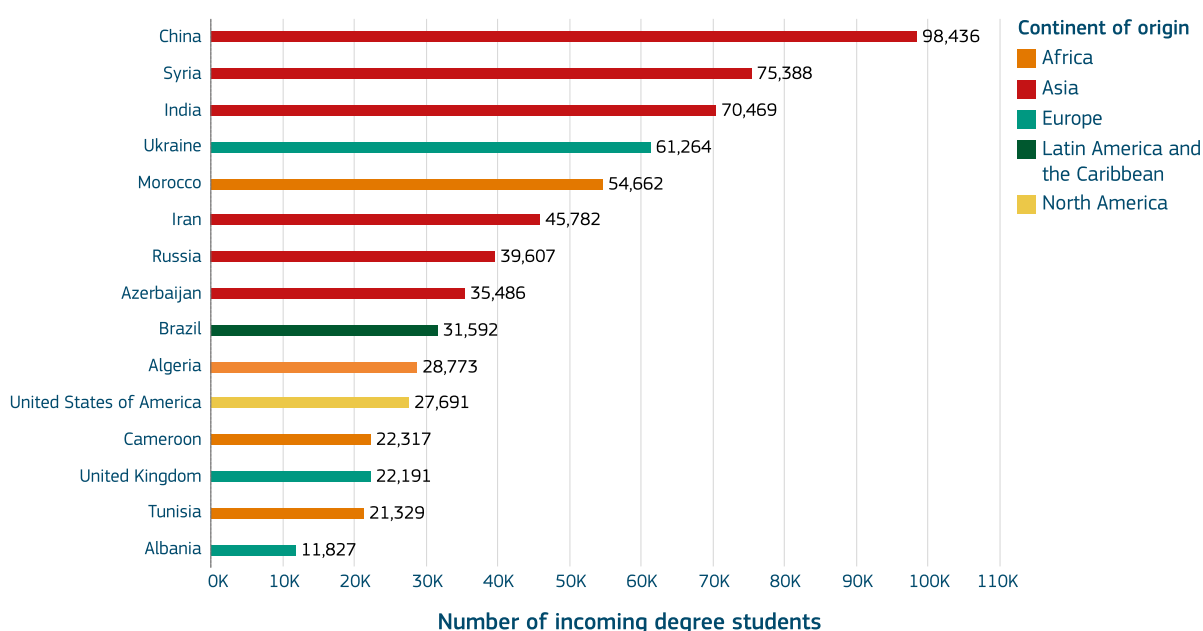
Source: UIS and OECD stats, 2025

Notes: Mobile students for whom the origin or destination country is unknown are excluded from this figure. Regional classification according to the United Nations geoscheme, also used by UNESCO.

4.1.2. Countries of origin of incoming students to the Study in Europe region

China is the leading country of origin for international degree students in the Study in Europe region, with almost 100,000 Chinese degree students enrolled in 2022 (Figure 8). China is **followed by Syria**, which had about 75,000 degree students enrolled in the Study in Europe region in 2022, and **India** with more than 70,000 students enrolled. Six of the top 15 countries of origin for international degree students in the Study in Europe region are located in Asia.

Figure 8. Top 15 countries of origin with the largest numbers of degree students enrolled in the Study in Europe region in 2022 (excluding mobility from within the Study in Europe region).

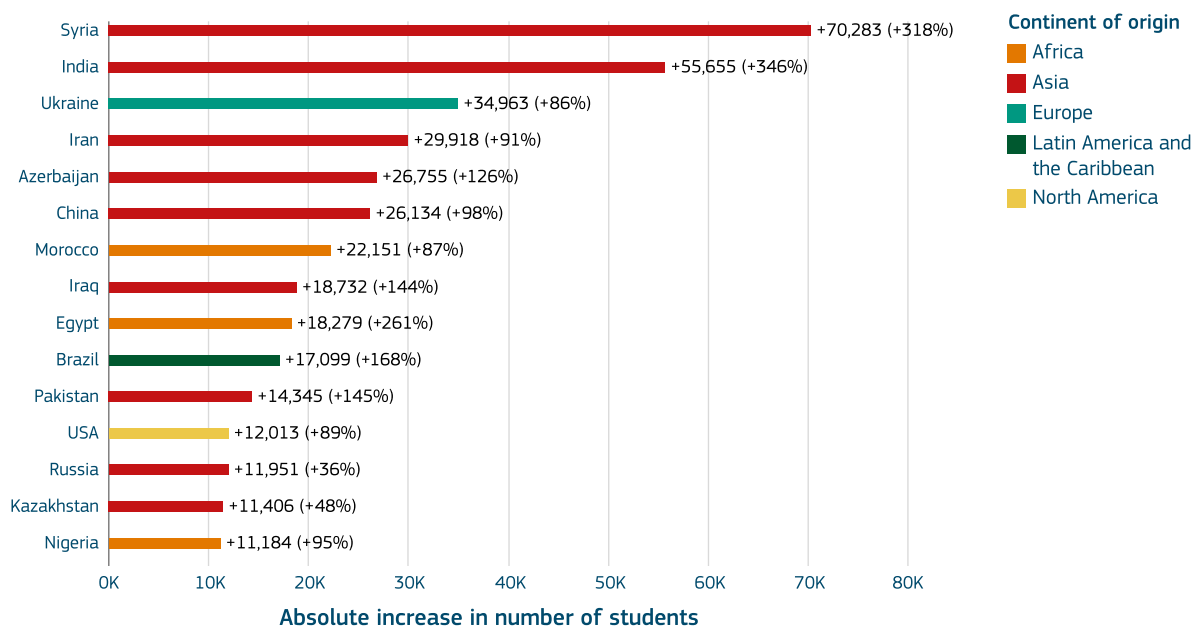


Source: UIS and OECD stats, 2025

Note: Mobile students for whom the origin or destination country is unknown are excluded from this figure.

Figure 9 shows the absolute growth in incoming degree student numbers to the Study in Europe region for the countries of origin that increased the most between 2013 and 2022. In this period, the **largest absolute increase was recorded from Syria**: there were 70,000 more Syrian students enrolled in Study in Europe countries, most notably neighbouring Türkiye, in 2022 compared to 2013. **India** is next, with incoming student numbers having increased by 55,000 over 10 years. **Ukraine** ranks third, with over 35,000 more degree students in the Study in Europe in 2022 compared to 2013. Nine of the 15 countries of origin with the highest increases in incoming student numbers are Asian countries and three are African.

Figure 9. Top 15 countries of origin with the largest absolute increase in degree student numbers in the Study in Europe region between 2013 and 2022 (excluding mobility from within the Study in Europe region).



Source: UIS and OECD stats, 2025

Note: Mobile students for whom the origin or destination country is unknown are excluded from this figure.

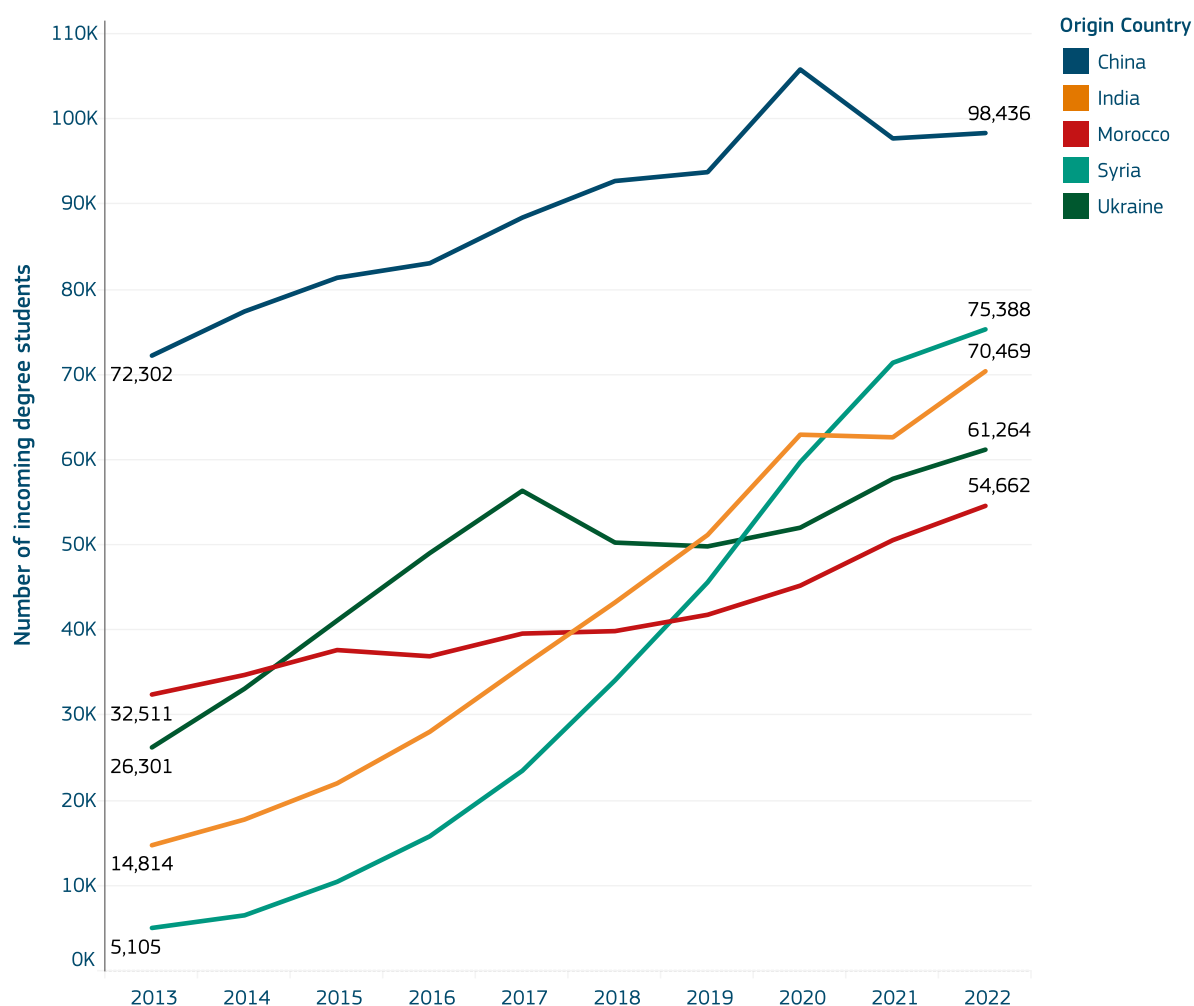
Figure 10 displays the 10-year development in degree mobility from the current top five countries of origin. In 2022, the **Indian degree student population** in the Study in Europe region was almost **five times larger** than in 2013, reflecting the broader global trend described in Chapter 3. As noted in that chapter, the main drivers of expanding outgoing degree mobility from India are rising prosperity, combined with the limited supply of places at prestigious Indian tertiary education institutions.

Since 2013, **Syria** has recorded a **15-fold increase** in the number of its degree students enrolled in Study in Europe countries. The fast growth in mobility from Syria can be attributed to the civil war, which spanned the decade between 2013 and 2022 and drove millions of Syrians to flee to Europe. In 2022, seven out of 10 Syrian degree students in the Study in Europe region were hosted by neighbouring Türkiye. The very rapid increases recorded from India and Syria far exceeded the 36% growth in Chinese degree student numbers between 2013 and 2022.

Although incoming degree mobility from **Ukraine** to the Study in Europe region **more than doubled** in this period, the growth occurred predominantly from 2013 to 2017. Notably, for the years between 2015 and 2018, Ukraine was the second most common country of origin for international degree students in the Study in Europe region. After a brief period of decline, the number of Ukrainian enrolments began picking up again after 2019. This may reflect growing instability in Ukraine amid the escalation of the war in Donbas between Ukrainian-government and Russian-backed forces.

Since 2013, Morocco has dropped from second to fifth place in the top five countries of origin for international degree students in the Study in Europe region. As Figure 10 shows, the trajectory growth in student numbers from Morocco in the 10 years to 2022 is both more gradual and more stable than that of other countries in the top five (+68%).

Figure 10. Number of degree students in the Study in Europe region from the top five countries of origin (2013–2022), excluding mobility from within the region.



Source: UIS and OECD stats, 2025

Notes: Mobile students for whom the origin or destination country is unknown are excluded from this figure.

The countries shown constitute the five countries of origin with the largest number of international degree students in the Study in Europe region in 2022.

Countries of origin by income level

Figure 11 illustrates the distribution of incoming students to the Study in Europe region in 2022 by the income level of their origin country according to the World Bank.¹⁶

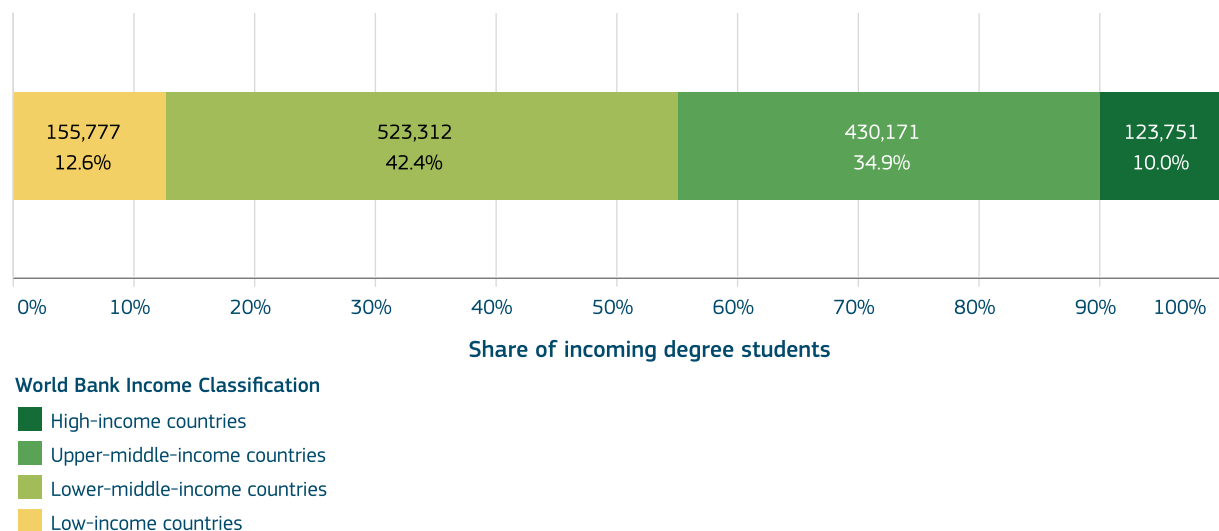
¹⁶ See **Annex** (Table A3) for the distribution of incoming students by World Bank income level for each individual destination country in the Study in Europe region.

Together, **middle-income countries accounted for 77%** of all incoming degree students to the Study in Europe region in 2022. The **largest share (42%)** came from **lower-middle-income countries**.¹⁷ Within this group, India was the top contributor, accounting for 13% of incoming mobility from lower-middle income countries, followed by Ukraine (12%) and Morocco (10%). **Upper-middle-income countries** accounted for **35%** of incoming students in 2022. China is the main country of origin by some distance, making up 23% of students from this income group. After China follow Russia (9%) and Azerbaijan (8%).

Students from **low-income countries** made up **13%** of incoming students.¹⁸ Nearly half (48%) of these students came from Syria. Students from Somalia and Afghanistan both accounted for 7% of degree students from low-income countries in the Study in Europe region in 2022.

The remaining **10%** of incoming students were from **high-income countries**. Among these, 22% came from the USA, followed by the United Kingdom (18%) and Switzerland (11%).

Figure 11. Distribution of incoming degree students to the Study in Europe region in 2022 by country of origin income level (excluding mobility from within the Study in Europe region).



Source: UIS and OECD stats, 2025, and World Bank country classifications by income level (<https://blogs.worldbank.org/en/opendata/world-bank-country-classifications-by-income-level-for-2024-2025>).

Although the largest group of incoming degree students in 2022 came from lower-middle-income countries, this has only been the case since 2020. As shown in Figure 12, upper-middle-income countries accounted for the largest share of incoming students between 2013 and 2019. The growing share of international students from lower-middle-income countries may partly be attributed to broader demographic trends (a faster growing youth population in lower-income countries relative to higher-income countries), and country-level developments such as the large influx of students from Ukraine (a lower-middle-income country).

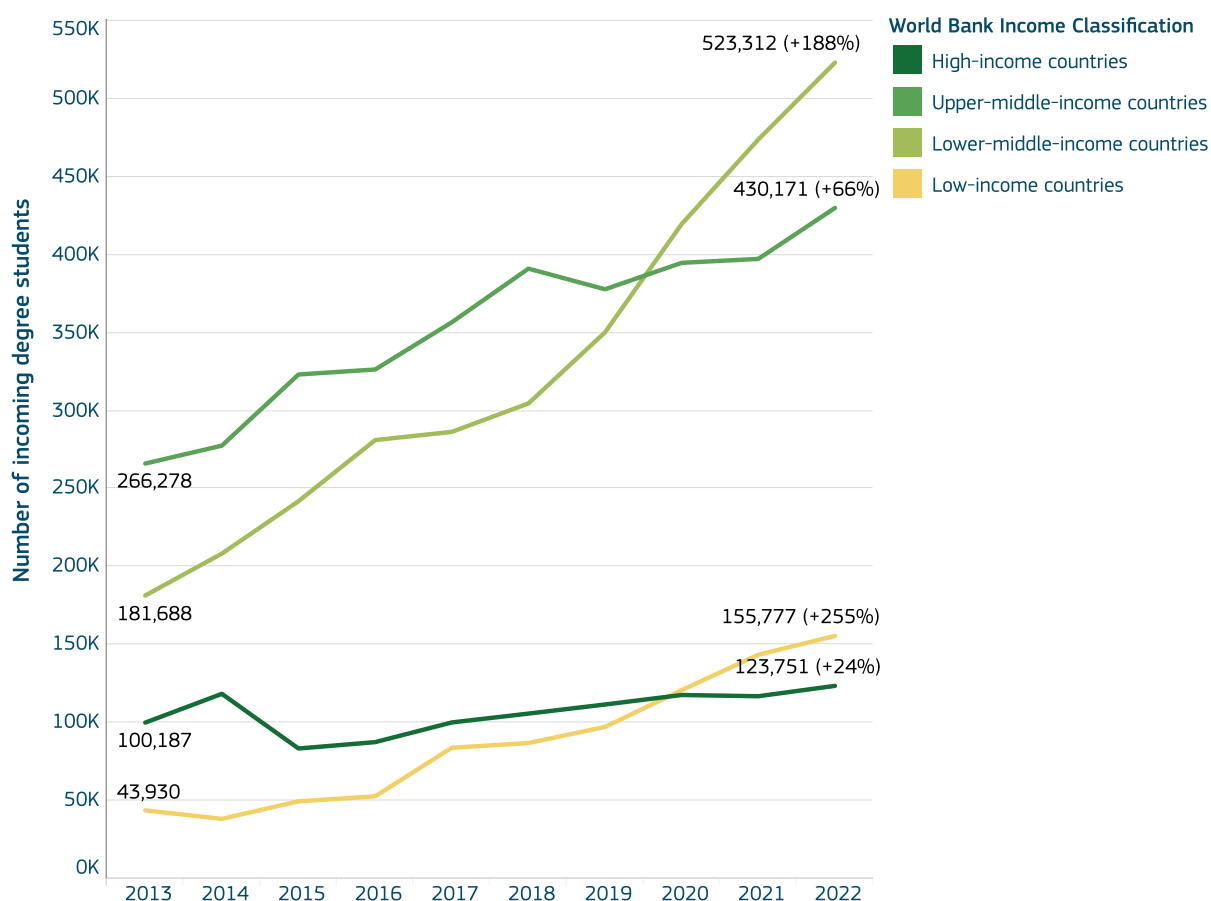
The number of students from lower-middle-income countries increased by 188% between 2013 and 2022, rising from almost 182,000 to roughly 523,000. Although the total number of students from low-income countries remained smaller, it grew substantially by 255% since 2013. This growth is primarily driven by the large increase in Syrian students.

¹⁷ Note that the largest share of the world population lives in lower-middle-income countries, even more so when excluding the Study in Europe region itself (Our World in Data, 2025).

¹⁸ Mobile students from low-income countries are concentrated in Türkiye; 58% of students from this income group study in Türkiye in 2022. For other income groups there is no destination country that hosts more than 30% of incoming students of a particular income group.

The number of students from upper-middle-income countries increased by 66% compared to 2013. For high-income countries the growth was more modest: an increase of 24%, from roughly 100,000 in 2013 to almost 124,000 in 2022.

Figure 12. Development in incoming degree mobility to the Study in Europe region by income level of country of origin (2013-2022), excluding mobility from within the region.



Source: UIS and OECD stats, 2025, and World Bank country classifications by income level (<https://blogs.worldbank.org/en/opendata/world-bank-country-classifications-by-income-level-for-2024-2025>).

Note: The World Bank's income classification of countries can vary across years. In the figure, each year reflects the classification in that specific year. Countries with no World Bank income classification are excluded.

Table 4 shows the distribution of incoming students at each income level by degree type. Students from low-income countries more commonly enrol in a bachelor or short-cycle programme in the Study in Europe region compared to the overall average. The opposite is true for students from high-income countries; for these students it is less common to pursue a Bachelor's or short-cycle programme but more common to enrol in a Master's programme. PhD enrolments are most prevalent among students from upper-middle-income countries.

Table 4. Distribution of incoming students to the Study in Europe region by income level and degree type compared to the overall distribution of incoming students over the four tertiary education levels (excluding mobility from within the Study in Europe region).

World Bank income classification	Short-cycle	Ba	Ma	PhD	Total
High-income countries	1.6%	36.5%	51.3%	10.6%	100%
Upper-middle-income countries	2.9%	44.4%	40.8%	11.9%	100%
Lower-middle-income countries	2.6%	41.3%	47.8%	8.4%	100%
Low-income countries	14.5%	58.1%	23.1%	4.3%	100%
Overall distribution of incoming students	4.2%	44.0%	42.5%	9.3%	100%

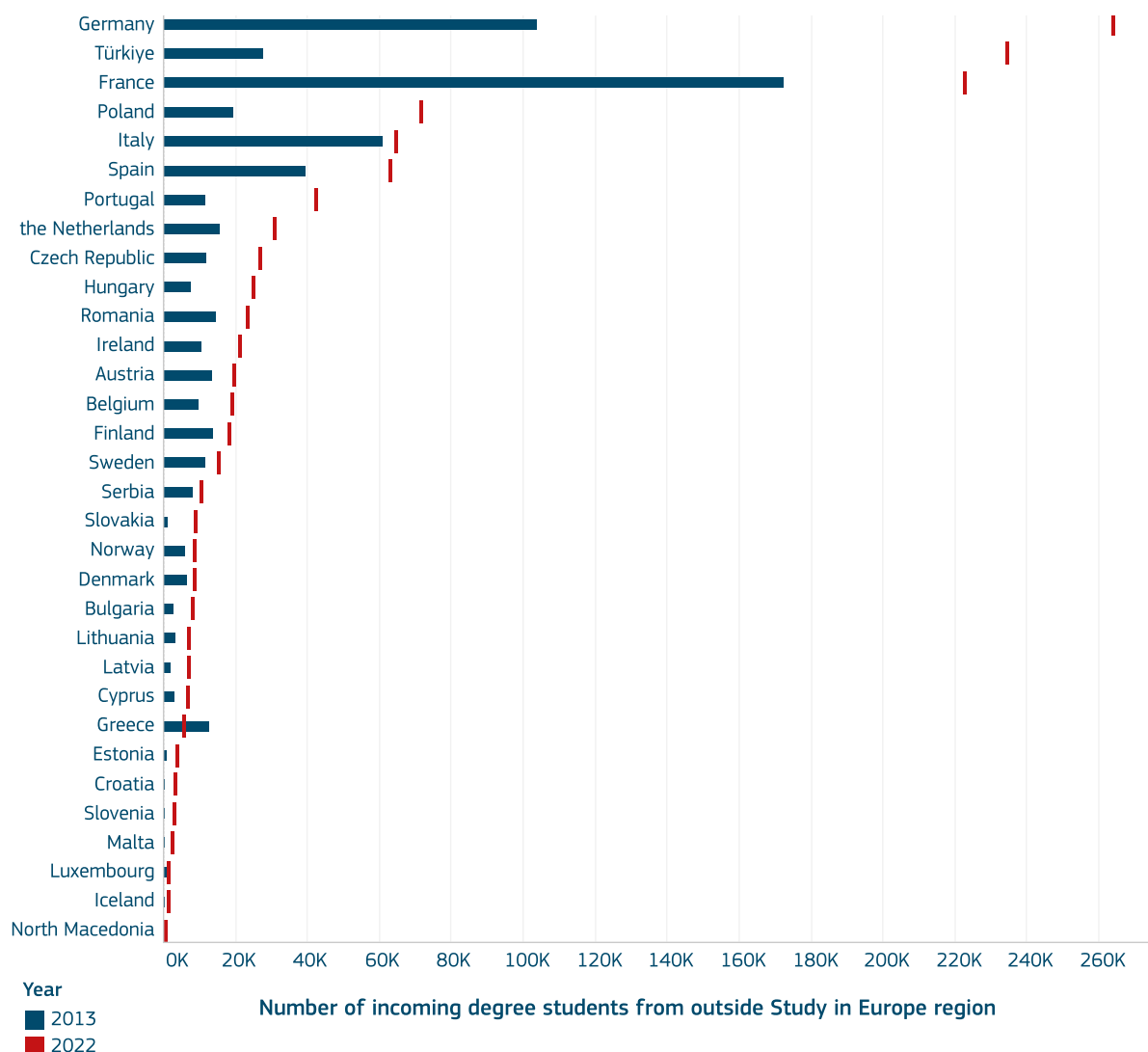
Source: UIS and OECD stats, 2025, and World Bank country classifications by income level (<https://blogs.worldbank.org/en/opendata/world-bank-country-classifications-by-income-level-for-2024-2025>).

4.1.3. Host countries in the Study in Europe region

Within the Study in Europe region, **Germany** (264,000; 21% of total), **Türkiye** (234,000; 19%), **France** (222,000; 18%), **Poland** (71,000; 6%) and **Italy** (64,000; 5%) **hosted the largest numbers of international degree students** from the rest of the world in 2022 (Figure 13). For comparison, 10 years earlier, the top five host countries in the Study in Europe region were France (172,000), Germany (103,000), Italy (60,000), Spain (39,000) and Türkiye (28,000; see also Figure 15).

The **overall growth** in incoming degree mobility to the Study in Europe region between 2013 and 2022 was **unevenly distributed** across the constituent countries. **Türkiye** saw the **largest absolute increase** in incoming degree mobility, with more than 200,000 additional international enrolments in 2022 compared to 2013. This rapid growth can in part be explained by Türkiye's reception of refugees and students fleeing countries at war or in crisis (notably Syria, Iraq, Somalia, and Afghanistan). Other countries to experience a **large absolute increase** in incoming degree mobility in this period were **Germany** (+160,000), **Spain** (+23,000), **Poland** (+52,000), and **Portugal** (+30,000). Relative to other leading Study in Europe host countries, Italy recorded only modest growth in international student numbers between 2013 and 2022 (+3,000).

Figure 13. Total absolute number of incoming degree students per host country in the Study in Europe region in 2013 and 2022 (excluding mobility from within the region).



Source: UIS and OECD stats, 2025

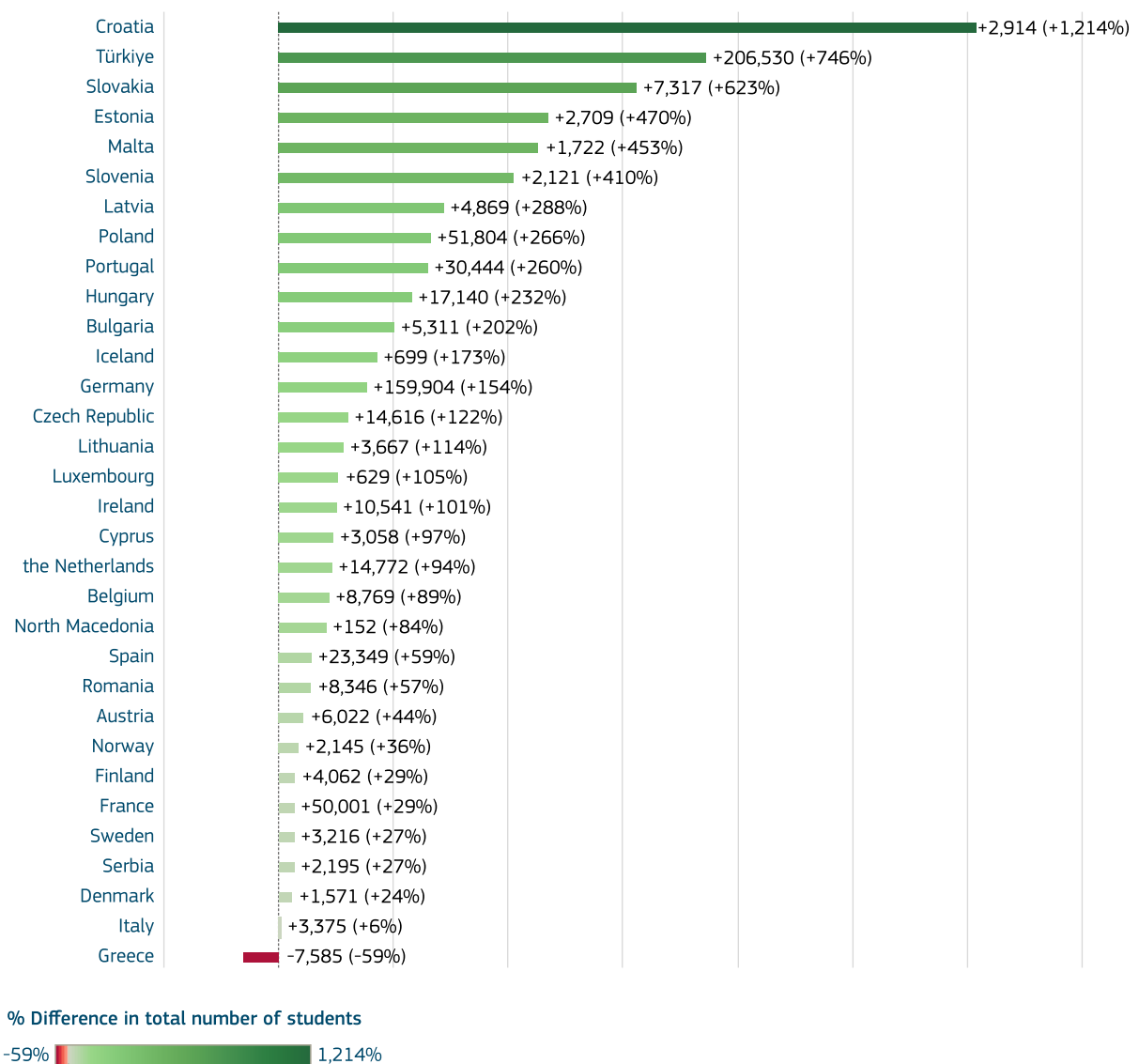
Note: Mobile students for whom the origin or destination country is unknown are excluded from this figure. Data for the Netherlands excludes the Dutch Caribbean islands (Aruba, Curaçao and Sint Maarten). See also **Annex** (Table A1).

Figure 14 shows the relative growth in incoming degree mobility to Study in Europe countries between 2013 and 2022. Although a small destination in terms of absolute numbers, **Croatia** experienced the **fastest relative growth** of any Study in Europe country in this period. Croatia hosted about 3,000 degree-mobile students from outside the Study in Europe region in 2022, representing 2% of all tertiary enrolments in the country. This is roughly 12 times more students than in 2013. As well as recording the largest absolute increase in student numbers, **Türkiye's relative growth rate** was the **second fastest** in the Study in Europe region, at almost 800%.

Notably, **six of the 10 fastest growing destinations in relative terms are in the Central European and Baltic regions** (Slovakia, Estonia, Slovenia, Latvia, Poland, and Hungary). Internationalisation, talent attraction, and the employability of graduates have been national policy priorities in Central European and Baltic countries including Slovakia, Estonia, Slovenia and Latvia (as well the Czech Republic). Scholarship programmes for non-EU students and strategic selection of target markets are among the concrete factors likely to have driven faster growth in these countries. Specifically in the case of Poland, the growth rate may to a large degree be explained by the inflow of Ukrainian students, of which 54% were hosted by Poland in 2022.

In contrast, the Nordic countries have experienced among the slowest growth rates in their international degree student populations (with the exception of Iceland, although absolute numbers there remain very low). Of this group, Denmark recorded the least growth, likely influenced by restrictions on the number degree programmes taught in English (see **Box 2**). Greece is the only Study in Europe destination to have seen incoming degree mobility from outside the region fall in the 10 years to 2022 (by approximately 8,000 enrolments). The Greek government debt crisis between 2009 and 2018 may have contributed to this decline.

Figure 14. Absolute and relative change in number of incoming degree students per host country in 2022 compared to 2013 (excluding mobility from within the Study in Europe region).



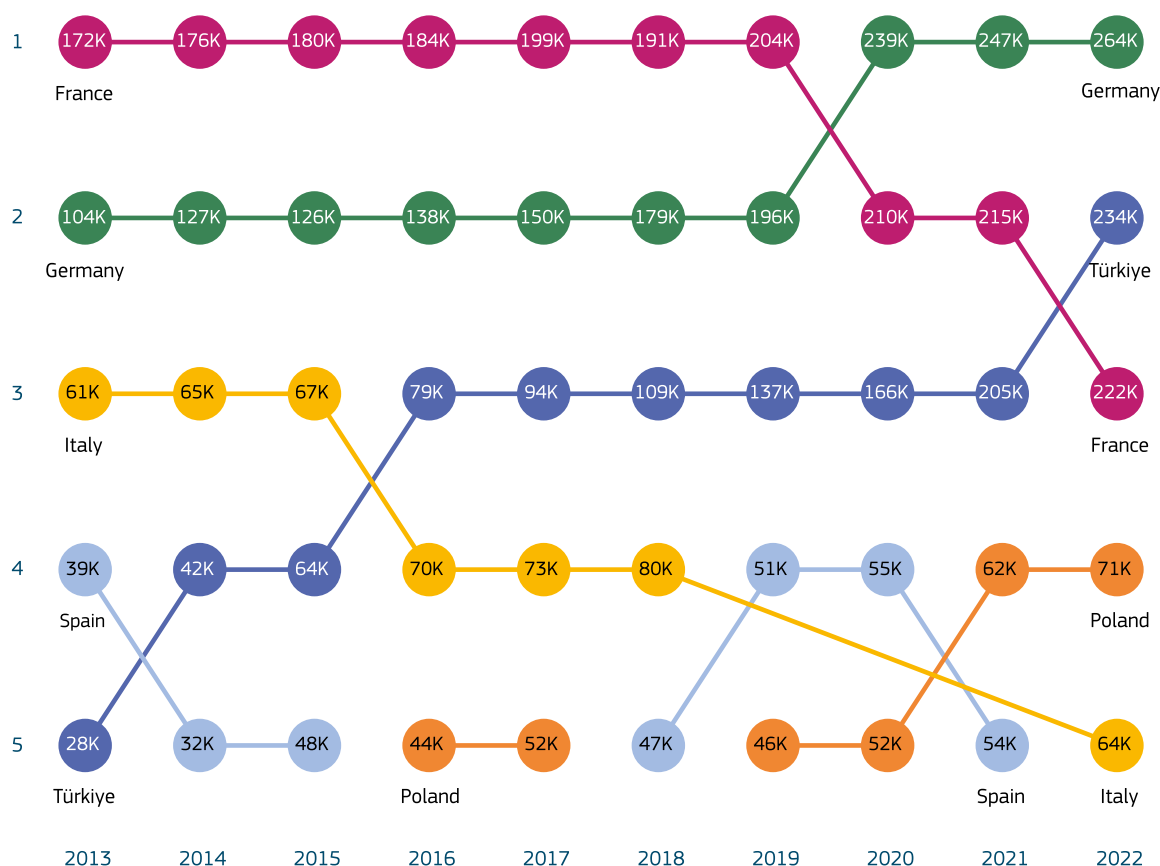
Source: UIS and OECD stats, 2025

Notes: Mobile students for whom the origin or destination country is unknown are excluded from this figure.

Countries and territories with no data in either 2013 or 2022 are omitted. Data for the Netherlands excludes the Dutch Caribbean islands (Aruba, Curaçao and Sint Maarten). Italy and France changed their methodology in this period, which explains their low growth.

The 10 years to 2022 saw significant shifts in the top five host countries in the Study in Europe region. Whereas France was long the number one destination for degree students from outside of the region, Germany jumped to first place in 2020 (Figure 15). Consistent with the fast rate of growth noted above, Türkiye climbed from fifth to second place over the 10-year period, even overtaking France in 2022. Italy steadily dropped in the ranking from 2015 onwards and in 2022 occupied fifth place.¹⁹ Having alternated with Spain for several years as the fifth most popular destination, Poland was bumped up to fourth place by a steady increase in student numbers from 2019, while Spain experienced stagnation.

Figure 15. Top 5 destination countries of international degree students in the Study in Europe region between 2013 and 2022 (excluding mobility from within the region).



Source: UIS and OECD stats, 2025

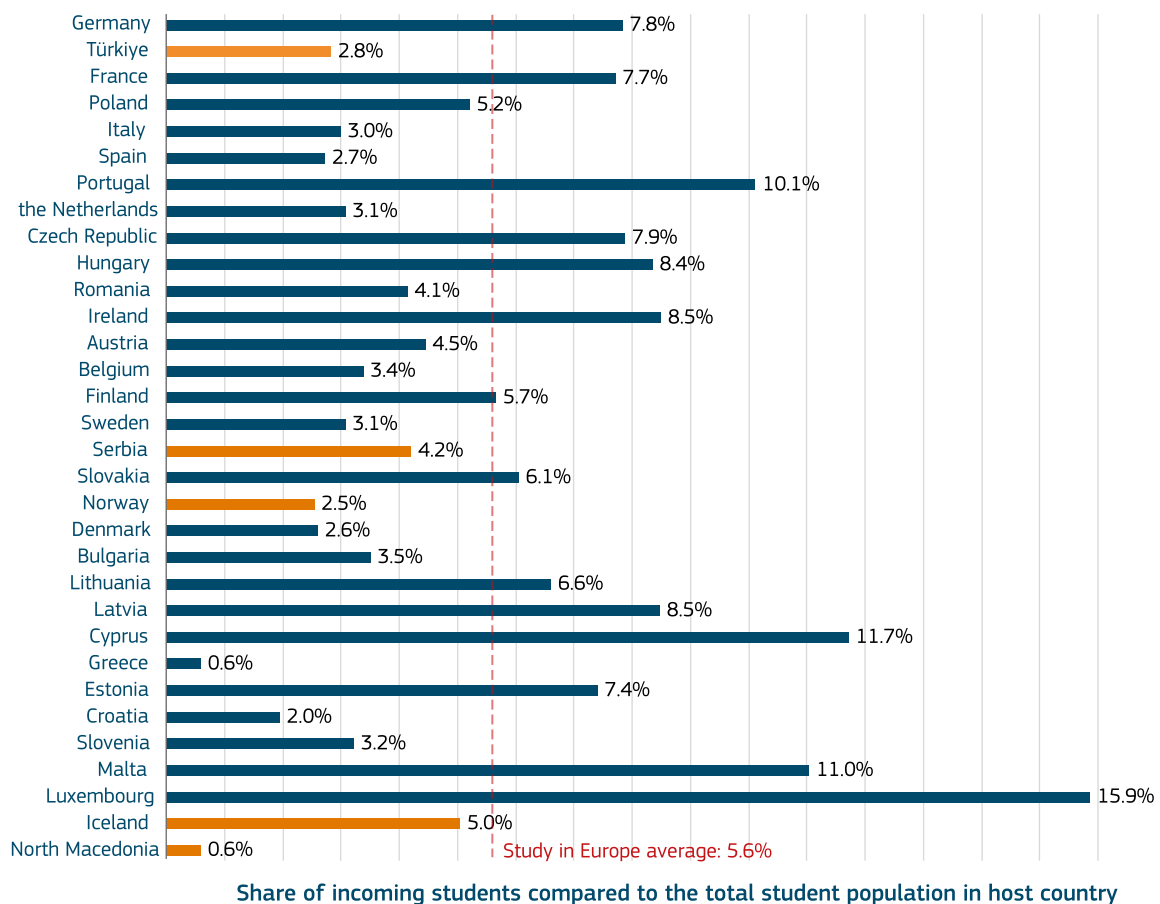
Notes: Mobile students for whom the origin or destination country is unknown are excluded from this figure.

France and Italy changed their method for counting international students in 2018 and 2019 respectively. Results for these countries should therefore be interpreted with caution.

¹⁹ Likely due to a methodological change: until 2019, Italy counted foreign enrolments rather than international enrolments (see **Glossary**).

As Figure 16 shows, incoming degree students from outside the Study in Europe region accounted for at least one out of 10 tertiary enrolments in Luxembourg (16%), Cyprus (12%), Malta (11%), and Portugal (10%) in 2022. With the exception of Portugal, however, these host countries are small in absolute terms (see Figure 13). Among the 10 most popular destinations in the Study in Europe region, Portugal stands out as also having the most international student population in relative terms. In France, Germany, Czechia, and Hungary, 8% of the total student population was from outside the Study in Europe region, exceeding the regional average of 6%. In other major host countries, namely Türkiye,²⁰ Italy, Spain and the Netherlands, students originating from outside the Study in Europe region accounted for a below-average share of total tertiary enrolment (3%). Finally, Greece and North Macedonia were the only Study in Europe countries in 2022 with less than one percent of all students coming from outside the region. In Greece, the limited and slow-growing offer of English-taught degree programmes is likely to be a contributing factor (British Council & Study Portals, 2024).²¹

Figure 16. Incoming degree student enrolment as a proportion of total tertiary enrolment (excluding mobility from within the Study in Europe region).



Source: UIS and OECD stats, 2025

Notes: Countries are ranked in descending order of the number of international degree students enrolled in 2022. Mobile students for whom the origin or destination country is unknown are excluded from this figure. Data for the Netherlands excludes the Dutch Caribbean islands (Aruba, Curaçao and Sint Maarten).

²⁰ The results for Türkiye are partly explained by its very large student population. With over 8 million tertiary enrolments, Türkiye has the largest number of students of any Study in Europe country, also relative to its total population. One reason for this is the wide availability of open and distance education programmes.

²¹ No data are available on English-taught programmes in North Macedonia.

Box 2. Development of English-taught programmes in non-anglophone countries

English-medium education is a means by which study destinations in the non-anglophone world can attract international talent and boost their competitiveness in the international higher education sphere. As such, the provision of English-taught degree programmes is of strategic importance for national governments and higher education policy makers in the Study in Europe region. In 2019, for example, the French Ministry for Higher Education and Research stated the ambition to double the number of English-taught programmes (ETPs) by 2027 as part of a wider strategy to enhance the attractiveness of France as a study destination.²² Equally, the ETP supply is used as a policy lever by governments seeking to manage the flow of international students. In 2021, the Danish government reduced the number of university places available in English-taught programmes, especially those with a low post-graduation employment rate (Uddannelses-og Forskningsministeriet, 2021).²³

Unsurprisingly, the world's leading providers of English-taught programmes are the major anglophone destinations: the United Kingdom, the USA, Australia, and Canada, collectively known as the 'big four'. However, their share of the market has contracted slightly in recent years, from 82% in 2021 to 78% in 2024 (British Council & Studyportals, 2024). At the same time, the expansion of English-medium higher education in other regions of the world, including Europe and Asia, offers new opportunities for growth and competition.

In collaboration with the British Council, Studyportals conducted an analysis of the global ETP market beyond the 'big four' destinations at two time points (2019 and 2024), based on their database of more than 240,000 study programmes worldwide.²⁴ At a regional level,²⁵ the European Higher Education Area²⁶ (EHEA; excluding the UK) emerges as the market leader by a large margin, supplying 50% of all ETPs worldwide outside of the 'big four' (20,600). The second and third biggest providers are East Asia (Malaysia, Japan, South Korea, and Thailand), with a market share of 12% (4,700), and the Chinese region (China, Hong Kong and Taiwan) with 10% (4,000).

Study in Europe region

Among the non-anglophone Study in Europe countries,²⁷ **Germany** is the **top provider of English-taught programmes**, with about 2,270 on-campus ETPs in 2024, closely followed by **the Netherlands** with 2,100. **Türkiye** (1,600), **France** (1,320) and **Italy** (1,210) complete the top five in 2024. Although Germany (+19%) and the Netherlands (+8%) have maintained their leading position since 2019, other ETP providers in the region are growing at a faster rate, namely: Türkiye (+55%), Italy (+46%), France (+30%), and Poland (+25%). One of the smaller providers in absolute terms (450), Czechia increased its ETP offer by 78% between 2019 and 2024. In contrast, Denmark reduced the number of degree programmes taught in English by one third (-33%), reflecting the government restrictions imposed in 2021.²⁸ Norway (-29%), Spain (-11%), Cyprus (-7%) and Finland (-6%) also saw their ETP supplies shrink in this five-year period.

22 For more information see <https://www.enseignementsup-recherche.gouv.fr/fr/bienvenue-en-france-la-strategie-d-attractivite-pour-les-etudiants-internationaux-49178>

23 English-language business academies and University Colleges in Denmark were the main target of the restrictions.

24 The Studyportals database of English-taught study programmes worldwide has an estimated coverage of 90%.

25 Regional groupings used in the Studyportals analysis: Americas, the European Higher Education Area, Sub-Saharan Africa, Middle East and North Africa, Chinese Region, South Asia, East Asia.

26 The EHEA includes all 33 Study in Europe countries, plus 16 others: Albania, Armenia, Azerbaijan, Belarus, Bosnia and Herzegovina, Kyrgyzstan, Switzerland, Ukraine, United Kingdom and Vatican City. In the Studyportals analysis, the UK is not included in the EHEA as it is already one of the 'big four'.

27 Ireland is the only anglophone country in the Study in Europe region.

28 The Danish government announced a reversal of restrictions in 2023.

Outside of the European Higher Education Area, the **top three non-anglophone providers** of English-taught degree programmes are **Malaysia** (2,400), **China** (2,300), and **India** (1,600). All three countries have shown fast growth since 2019 according to Studyportals data (2024), with the ETP supply having doubled in Malaysia and tripled in China and India.²⁹

Degree types

The majority of ETPs available in the European Higher Education Area are Master's programmes (69%). At less than one third, the EHEA has the lowest relative share of English-taught Bachelor's programmes of any world region. For comparison, the share of English-taught Bachelor's programmes is 44% in East Asia, 36% in the Chinese region, and 66% in the 'big four'. Among the Study in Europe countries, Sweden and Norway show the most pronounced skew, with more than 90% of their ETPs offered at Master's level. In contrast, at least 50% of the ETP offer is at undergraduate level in Cyprus and Türkiye.

Fields of study

Within the European Higher Education Area (excluding the UK), the largest shares of English-taught programmes are offered in Business & Management (19% of total ETP supply), Social Sciences (15%), and Engineering & Technology (13%). In the five years to 2024, the study disciplines with the fastest growth in ETP supply in the EHEA were Computer Science & IT (+33%); Environmental Studies & Earth Sciences (+31%); Agriculture & Forestry (+23%).

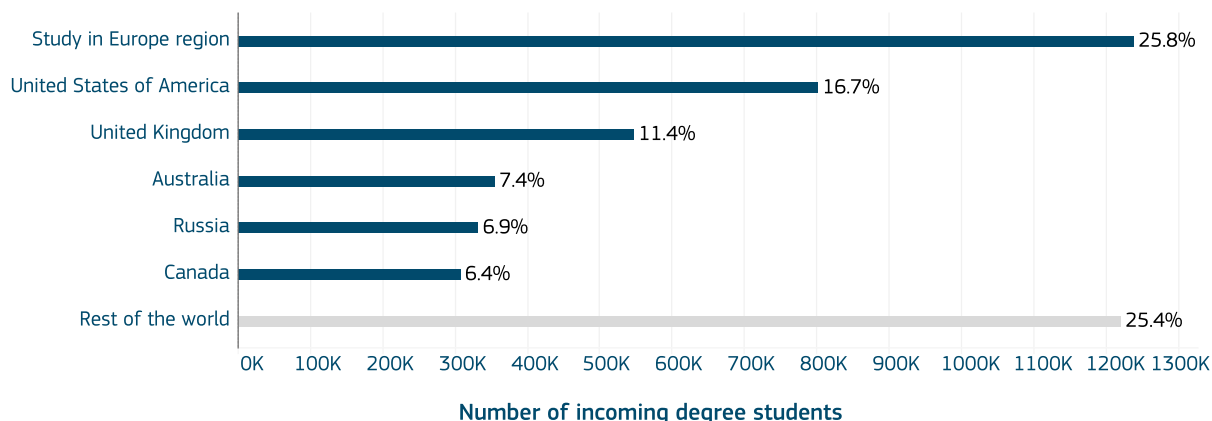
4.1.4. Market position of Study in Europe region relative to major competitors

Outside of the Study in Europe region, the **five biggest destinations** for degree mobility globally are the **United States of America (USA)**, the **United Kingdom (UK)**, **Australia**, **Russia**, and **Canada**. Out of the almost 5.7 million mobile students in 2022 for which the origin and destination are known, 864,000 came from the Study in Europe region and 4.8 million from the rest of the world. Figure 17 shows the leading destinations of those 4.8 million mobile students in 2022.

The **Study in Europe region** is the **market leader**, with **more than a quarter of all mobile students** pursuing their degree in the region (1,239,000; market share of around **26%**). After the Study in Europe region, the **USA** is the **second biggest destination**, hosting around **17%** of all degree-mobile students in 2022 (801,000). The **UK** follows with a market share of **11%** (547,000), while Australia (355,000), Russia (331,000) and Canada (307,000) each have market shares of between 6% and 8%. The remaining 25% of internationally mobile students from outside the Study in Europe region study in the rest of the world. Of those other countries, Japan (4%; 197,000), Argentina (3%; 133,000) and South Korea (3%; 121,000) are the destinations with the largest numbers of international degree students in 2022.

²⁹ Notable surges in programme supply in some study destinations can result from a combination of the country's efforts to enhance its competitiveness in higher education and Studyportals' data collection initiatives.

Figure 17. Total number and share of incoming degree students in the leading global destinations in 2022 (excluding mobility from within the Study in Europe region).



Source: UIS and OECD stats, 2025.

Notes: Mobile students for whom the origin or destination country is unknown are excluded from this figure.

Only degree students from outside the Study in Europe region are included.

China as a destination country was not included in this analysis because the country of origin of international degree students in China is not specified in the UOE data. This makes it impossible to exclude students originating from within the Study in Europe region. For completeness, the total number of international degree students in China in 2022 is 210,903 (UIS).

Development over time in degree mobility to the leading destinations

To enable market share comparisons between the Study in Europe region and other major destinations, the results below refer only to degree mobility originating from outside the Study in Europe region.

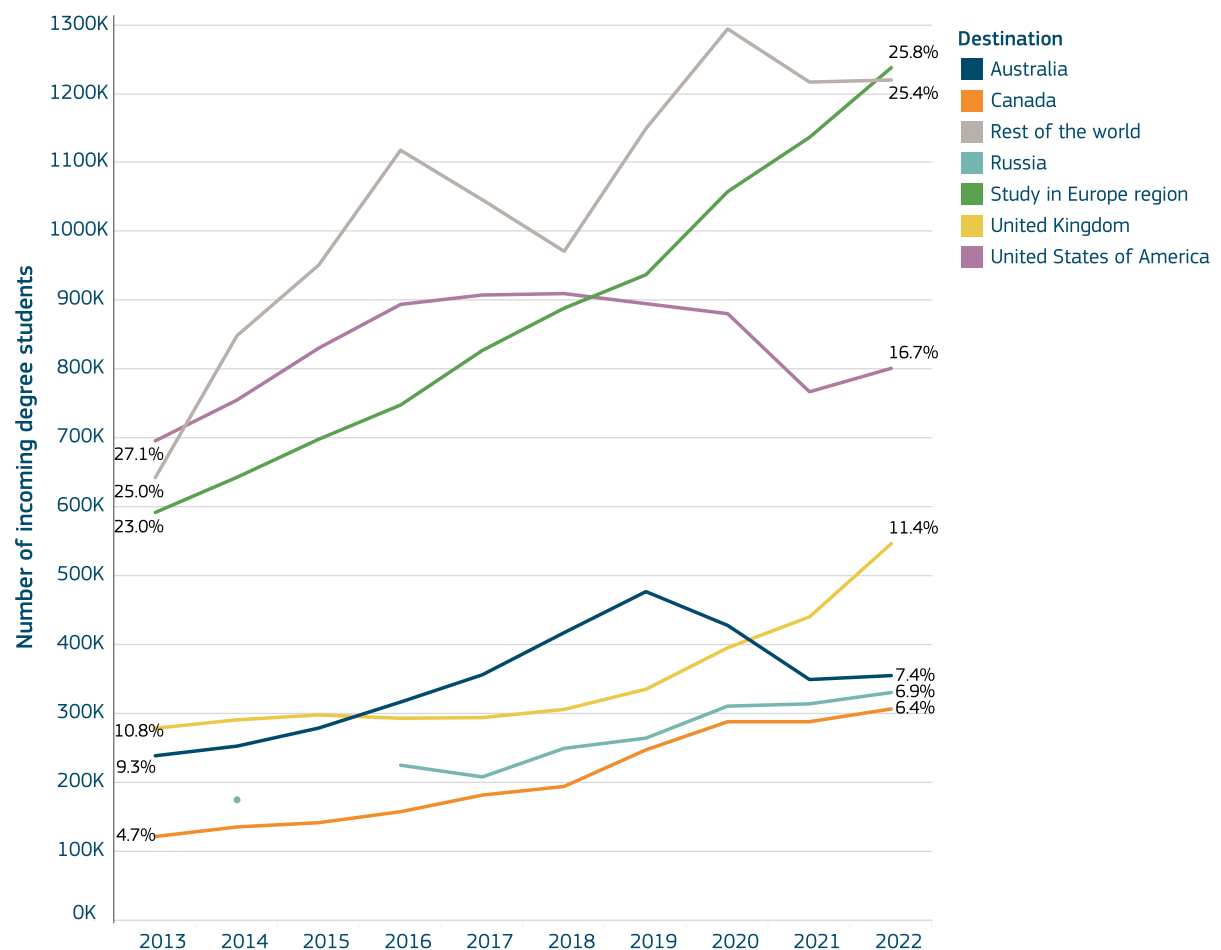
Over the past 10 years, there have been significant developments in the flows of international degree students to the major study destinations, as displayed in Figure 18. **Between 2013 and 2018, the global higher education market was led by the USA.** Of the 2.6 million degree-mobile students originating from outside of the Study in Europe region in 2013, more than a quarter (27%; 696,000 students) were enrolled in the USA. Following a period of sustained growth (+200,000 students in three years), incoming degree mobility to the USA entered a **phase of stagnation and decline between 2017 and 2020**. The post-2017 policy environment (see **Box 4**), as well as political developments in the country, may have contributed to the declining attractiveness of the USA as a study destination.

In **2021**, the USA saw a **further sharp drop** in international student numbers that can at least in part be explained by the global travel restrictions and border closures in effect during the COVID-19 pandemic. Although there was a **visible uptick** in student numbers in **2022**, coinciding with the lifting of travel restrictions, the **number** of international students in the USA (801,000) **has not yet returned to pre-pandemic levels**. This constitutes a **market share of around 17%**, which is **10 percentage points lower than in 2013**. **No other major study destination saw its market share contract to this extent.**

The **Study in Europe region**, meanwhile, recorded **consistent year-on-year growth** in the same period, and in **2019 overtook the USA** as the **largest destination market** for international students from the rest of the world. The number of degree-mobile students choosing the Study in Europe region **more than doubled in 10 years**, from 592,000 in 2013 to 1,239,000 in 2022. Notably, **rapid growth continued in 2021**, a year in which student mobility to almost all other major destinations (and to the rest of the world) contracted or stagnated due to the COVID-19 pandemic. Although government responses to the pandemic varied between Study in Europe countries, these results suggest that policies overall were less restrictive than in major destinations such as Australia and the USA.

The Study in Europe region increased its global market share from 23% to 26% in the 10 years to 2022; a relatively modest change compared to the increase in absolute numbers. This reflects the fast growth of the global higher education market between 2013 and 2022 (i.e., more mobile students globally) and strong competition from less-established destinations. The absolute number of students choosing destination countries in the ‘rest of the world’ (all other countries excluding the five major markets and China) almost doubled between 2013 and 2022. In 2022, incoming mobility to the Study in Europe surpassed the number of students going to those other countries for the first time.

Figure 18. Total incoming degree mobility to major destinations between 2013 and 2022 and market share (excluding mobility from the Study in Europe region).



Source: UIS and OECD stats, 2025.

Notes: Mobile students for whom the origin or destination country is unknown are excluded from this figure.

Only degree mobility originating from outside the Study in Europe region is included. Major destinations are defined as those with at least 5% market share in 2022. China as a destination country is not included in this analysis because the country of origin of international students in China is unknown. No data are available for Russia in the years 2013 and 2015.

The **United Kingdom almost doubled** the number of non-Study in Europe degree students enrolled **between 2013 and 2022**, from 279,000 to 547,000 (+96%). During this period, its **market share** remained around **11%**. The main growth occurred in the five years after 2018, with an **especially pronounced increase between 2021 and 2022** (+106,000 students). This is in part an indirect effect of the UK's official departure from the European Union on 1st January 2021 (Brexit), which led to a sharp decline in the number of EU students due to changes in fee status and visa requirements. Brexit created a greater imperative and opportunity for UK universities to intensify recruitment of non-EU students in order to maintain financial viability. The year 2021 also saw the re-introduction of the post-study work visa in the UK (see **Box 4**). The increased rate of growth after 2021 suggests that this strategy was effective in its goal of attracting more international students to the UK.

As Figure 18 shows, the UK overtook Australia **in 2021** to become the **third most popular destination** for degree-mobile students from outside the Study in Europe region. Similar to the Study in Europe region, there is no evidence based on these results that the COVID-19 pandemic affected degree mobility to the UK.

Between 2013 and 2019, Australia recorded a **two-fold increase** in international student numbers, from about 239,000 to 477,000. Australia was also the **third largest study destination** worldwide **between 2016 and 2020**, with an **11%** market share at its peak in **2019**. However, **in 2020 and 2021 the international student population shrank considerably**, reflecting Australia's strict inbound travel restrictions to prevent the spread of COVID-19. At the end of 2021, Australia began a staged re-opening of its international border to foreign nationals, with all remaining border restrictions lifted in July 2022. We would thus not expect to see signs of post-pandemic recovery in the 2022 data (which reflects the number of international students registered in Australia at the beginning of the academic year 2021/22).

The **fifth largest global destination** for degree mobility in 2022, **Russia** saw its international student numbers **almost double between 2014³⁰ and 2022**, from about 175,000 to 331,000 (+89%). The growth coincides with government initiatives to attract more international students to Russia (see **Box 4**). However, based on the current trajectory, the government's target of 710,000 students by 2025 is unlikely to be achieved. As already noted, 24th February 2022, the official start of Russia's war of aggression against Ukraine, falls outside the period covered by this analysis. We are therefore not yet able to observe any impact of the ongoing conflict on Russia's popularity as a study destination.

In **Canada**, international degree student numbers **more than doubled between 2013 and 2022**, from about 122,000 to 307,000 (+152%). The steady rate of growth for most of this period underlines Canada's appeal as a study destination. Government schemes supporting students to stay and work in Canada after graduation likely contributed to this (see **Box 4**). The growth in incoming mobility to Canada **stagnated after 2020**, in line with the global slowdown caused by the COVID-19 pandemic. In 2022, Canada's market share was 7%, almost two percentage points higher than in 2013.

Box 3 gives an overview of the changing policy landscape in major destination countries in the period 2013–2022. This needs to be read together with the section A look ahead in the Conclusion, where more recent policy developments in these countries are described.

Box 3. Evolving policy priorities in major destination countries 2013–2022

United States of America

USA government policy between 2013 and 2022 actively sought to attract and retain highly skilled individuals, in line with national economic and innovation priorities. Post-graduation work opportunities were expanded through the Optional Practical Training (OPT) scheme, which allows international graduates to work in their field of study for up to 12 months after completing their degree. In 2016, this period was extended to 24 months for STEM graduates, providing an attractive pathway to employment in the USA (Congressional Research Service, 2023). At the same time, there was increased scrutiny of visa fraud and industrial espionage, particularly targeting certain student cohorts from 2017 onwards (OECD, 2022).

United Kingdom

The period from 2013 to 2022 in UK international student migration policy was characterised by a complex interplay of immigration control objectives and strategic economic goals. In line with the government's priority of reducing overall net migration, the general post-study work visa for international graduates was scrapped in 2012 (Migration Advisory Committee, 2018). However, a

30 Data unavailable for Russia for 2013.

significant policy pivot occurred from 2019 onwards, starting with the launch of the UK government's *International Education Strategy*. This set targets to increase the number of international students to 600,000 annually by 2030 (Dept. for Education & Dept. for International Trade, 2019).

A crucial policy development consistent with this explicit strategic shift to promote UK higher education and actively boost international student numbers, was the introduction of the Graduate Route in July 2021 (Home Office, 2025). This reversed the 2012 policy, re-establishing a broad post-study work visa that allowed two years for most graduates (three years for PhDs) to work or seek employment at any skill level (OECD, 2024). The broader political context for this shift was the UK's withdrawal from the EU, which was completed in January 2021.

By late 2022, the success of these growth-oriented policies, particularly the rise in dependant visas, began to trigger renewed discussions about potential tightening measures.

Australia

Between 2013 and 2019, Australian government policies around international student migration prioritised growth and strategic development. Released in 2016, the *National Strategy for International Education 2025* aimed to expand the international education sector, diversify student countries of origin, and enhance the overall student experience, supported by streamlined visa processes and post-study work opportunities (OECD, 2022). The recovery phase following the COVID-19 pandemic saw a shift towards a more targeted approach, with the *Australian Strategy for International Education 2021-2030* emphasising alignment with Australia's workforce needs, as well as a renewed focus on student welfare (Department of Education, n.d).

By 2022, increasing concerns about overall migration levels in Australia began to influence policy, marking a move away from expanding incoming student mobility to a more measured and regulated approach.

Russia

Overall, the period 2013-2022 saw Russia actively pursue a strategic approach to boost its international student numbers, solidify its position in the global higher education market and leverage educational ties for broader national interests. The *Education Export Strategy*, a significant policy milestone unveiled in 2017, set an ambitious goal to nearly triple the number of international students in Russia, from approximately 220,000 in 2017 to 710,000 by 2025. Key components of the strategy included targeted recruitment initiatives, visa system relaxation, tertiary education reforms, and infrastructure development (ICEF Monitor, 2017; Minaeva & Prostakov, 2021).

Canada

Canada's international student migration policies in the decade up to 2022 emphasised attracting and retaining high-quality international students, as set out in the government's *International Education Strategy* (IES), which was launched in 2014 and updated in 2019 (Government of Canada, 2019). The established Post Graduation Work Permit (PGWP), a programme to facilitate international students' integration into the Canadian labour market, was further expanded in 2018. Furthermore, international graduates from Canadian institutions were provided with multiple pathways to permanent residency. Concurrently, in an effort to enhance the integrity of the international student programme, the government put new controls in place in 2015 to ensure that study permits are only issued to students attending authorised educational institutions, and to verify students' compliance with their permit conditions (OECD, 2022).

Box 4. China's emergence as a global competitor in international higher education

Although not included in the above analysis of major destinations due to a lack of comparable data, the rising prominence of China in the global higher education sphere should not be overlooked. Currently the tenth largest destination country worldwide for international degree mobility, China hosted nearly 211,000 full-time international students in 2022 (including students from the Study in Europe region). This is more than double the number recorded 10 years before. With a total student population of close to 40 million, the share of international enrolments nevertheless remains very small (less than 1%).

According to data from 2018, published by the Chinese Ministry of Education, a large majority of international students in China come from within Asia. South Korea, Thailand, Pakistan, and India were the major countries of origin in 2018, and the USA was the largest country of origin outside of Asia (Ministry of Education of the People's Republic of China, 2018).

The Chinese government's target of hosting 500,000 international students by 2020 (Chen, 2010) was hampered by the COVID-19 pandemic, with China's border closures causing a sharp decrease in the number of new international enrolments. However, this is likely to prove a temporary dip, as China becomes an increasingly competitive player in the international higher education market.

According to Studyportals, the number of English-taught programmes offered at Chinese universities increased by 12% between 2021 and 2023, making China by far the largest provider of English-taught programmes outside of the English-speaking world (van Gardingen, 2024). In terms of institutional quality, the country now hosts seven universities in the Times Higher education global top 100, two of which are ranked in the top 20. Another important factor in China's growing appeal is the low cost of tuition relative to established top study destinations such as the UK and the USA. Finally, the Chinese government is expanding scholarship schemes to attract more international students (British Council, 2024b).

How many students from the major countries of origin choose the Study in Europe region?

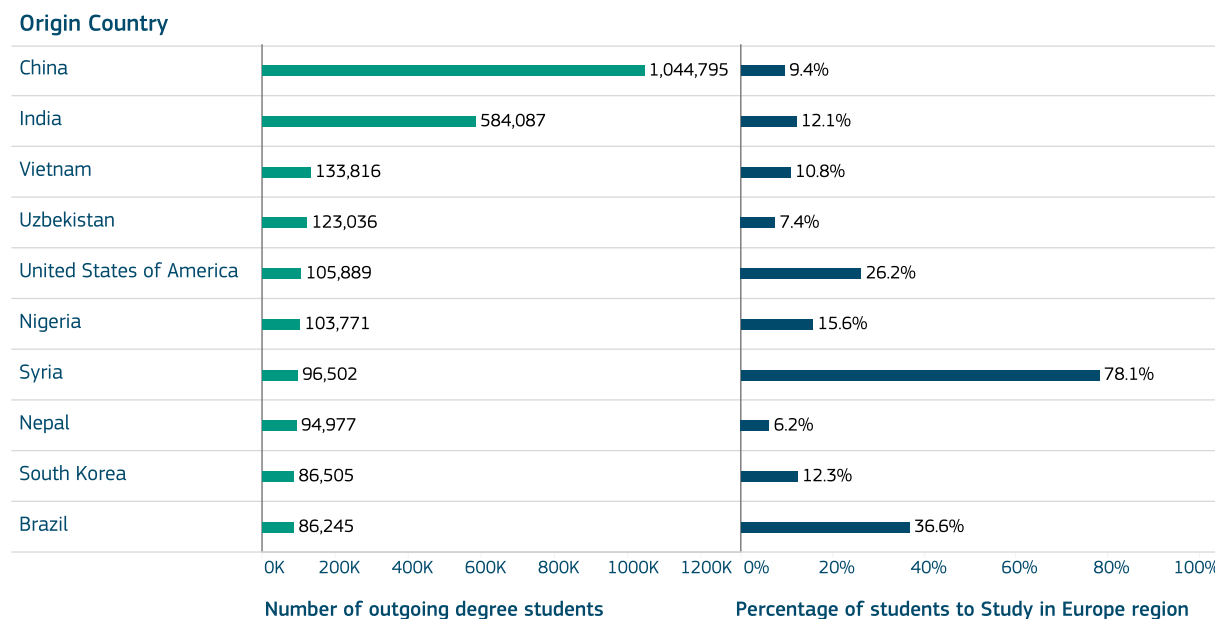
For the countries with the largest outbound flows globally, we examine how many of their outgoing degree students choose the Study in Europe region. Figure 19 displays the top 10 countries from which the most mobile students originated in 2022, with the percentage of these studying in the Study in Europe region. As discussed in Chapter 3, **China** is the **biggest country of origin worldwide** with more than one million mobile students. **Nine percent** of them were **enrolled in the Study in Europe region in 2022**, equivalent to around 98,000 students. Top destinations for Chinese students outside of the Study in Europe region are the USA (27%) and the UK (15%). The leading destination country in the Study in Europe region for Chinese students is Germany with around 38,000 students in 2022 (4% of the global total).

India is the **second biggest country of origin worldwide** (approximately 584,000 mobile students), and **12%** of its mobile students were **enrolled in the Study in Europe region in 2022**. For mobile Indian students, English-speaking countries are the main destinations: the USA (26%), the UK (22%), Canada (18%), and Australia (12%). Among Study in Europe countries, Germany leads, hosting 6% of the global total (about 34,000 Indian students in 2022). This represents almost half of all Indian students in the Study in Europe region.

Of the 10 countries with the largest number of degree-mobile students globally, **Syria** (78%), **Brazil** (37%), and **the USA** (26%) have the **highest proportion of their degree-mobile students enrolled in the Study in Europe region**. The majority of mobile Syrian students were hosted by Türkiye in 2022 (54%). Of the almost 32,000 Brazilian students in the Study in Europe region in 2022, half were enrolled in Portugal. Students from the USA are spread across the Study in Europe region, with their main destination countries being Germany, France, and Ireland.

Countries with a **large number of mobile students** globally, but a **low proportion** of them **studying in the Study in Europe region** are **Vietnam** (11%), **Uzbekistan** (7%), and **Nepal** (6%). From Vietnam, the main destination countries are Japan (29% of Vietnamese mobile students in 2022) and South Korea (20%). From Uzbekistan, the top destinations are Kyrgyzstan (42% of mobile students) and Russia (39%). The main destination country for Nepalese students is Australia, hosting 41% of all mobile students from Nepal in 2022.

Figure 19. Top 10 countries of origin with the most mobile students globally and the percentage of students from those countries enrolled in the Study in Europe region in 2022 (excluding mobility from within the region).



Source: UIS and OECD stats, 2025.

Which countries send the highest proportion of their mobile students to the Study in Europe region?

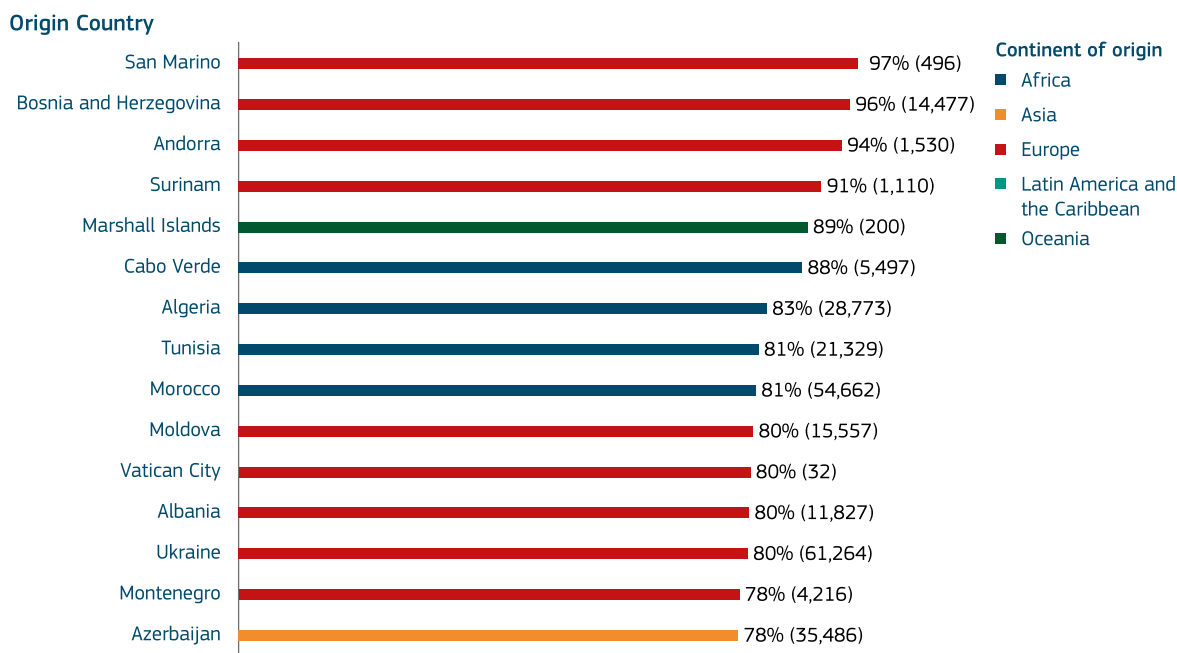
Figure 20 shows the 15 countries with the highest proportion of their degree-mobile students enrolled in the Study in Europe region in 2022. Around half of the top 15 consists of European countries that are not part of the Study in Europe region. For some of these European countries of origin, almost all of their mobile students go to the Study in Europe region. This is the case for San Marino (97%), Bosnia and Herzegovina (96%), and Andorra (94%). Other European countries in the top 15 are Moldova, Vatican City, Albania, Ukraine, and Montenegro.

From these European countries of origin, the most popular destinations in the Study in Europe region are often their neighbouring countries, showing the relevance of geographical proximity. For example, 96% of all mobile students from San Marino study in Italy. Students from Bosnia mainly study in neighbouring countries Serbia (39%), Croatia (16%), or Slovenia (9%). Of the mobile students from Andorra, 73% study in Spain, and 19% in France. Similarly, 63% of all mobile students from Moldova study in Romania. Almost half of the mobile students from Ukraine study in Poland (43%), while more than half of the mobile students from Montenegro study in Serbia (54%). Students from Albania are more spread over different countries in the Study in Europe region: 24% of them study in Italy, 19% in Germany, and 10% in Greece.

For non-European countries of origin, the most popular destinations in the Study in Europe region are often countries connected through historical colonial ties. For example, the majority of mobile students from Suriname study in the Netherlands (77%). Of all mobile students from Cabo Verde, 86% study in Portugal. France is a popular destination country for students from Algeria (70% of mobile students), Morocco (53%), and Tunisia (38%). For Azerbaijan, Türkiye is the most popular destination country with 63% of its mobile students enrolled

there, which can probably be explained by the close cultural, linguistic and economic ties between the two countries. The Marshall Islands have a high proportion of their students going to the Study in Europe region (89%) though their absolute number is low with only 200 students. France hosts 88% of all mobile students from the Marshall Islands.

Figure 20. Top 15 countries with highest proportion of their outgoing degree students enrolled in the Study in Europe region and absolute number of students enrolled in 2022 (excluding mobility from within the region).



Source: UIS and OECD stats, 2025.

Note: Mobile students for whom the origin or destination country is unknown are excluded from this figure.

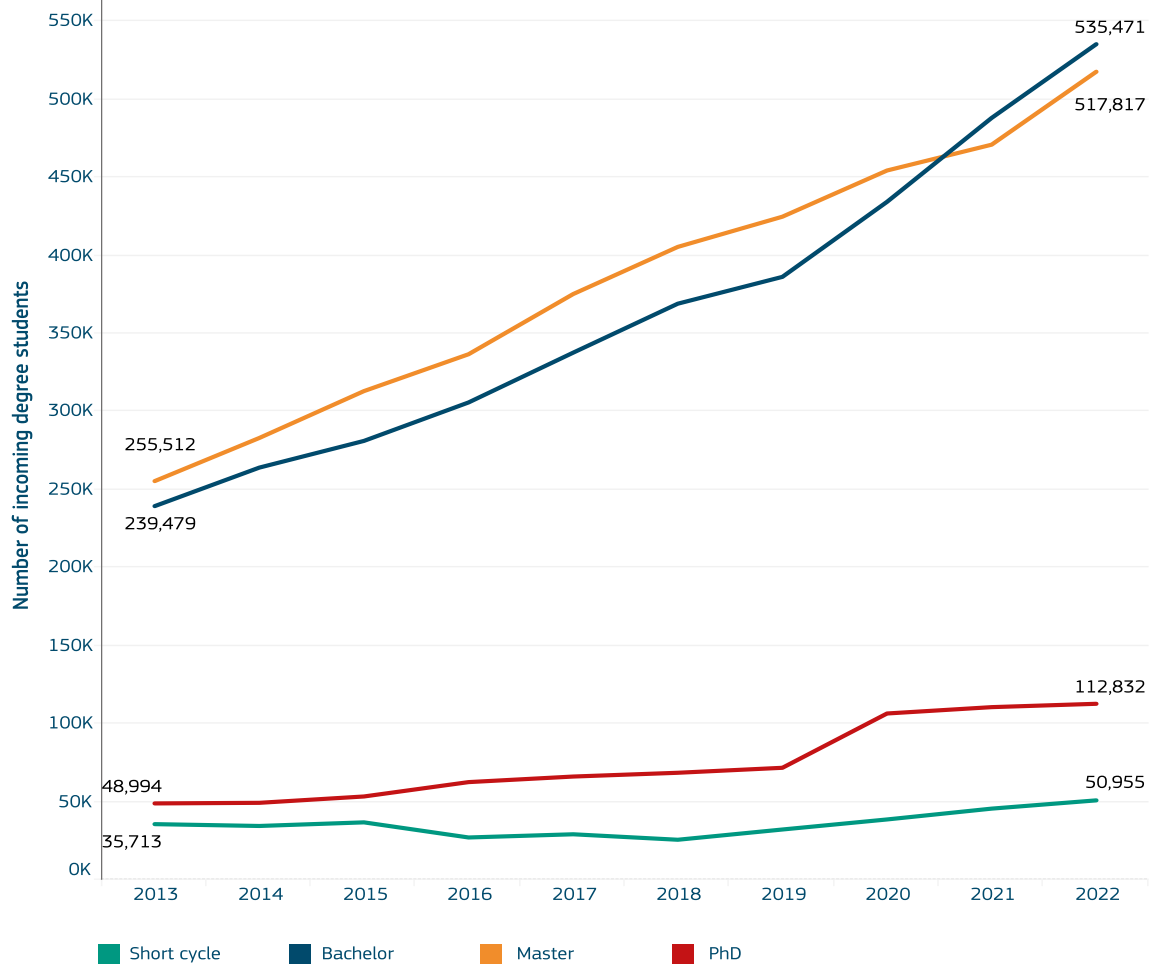
4.1.5. Incoming degree students by degree type

International students come to the Study in Europe region to pursue different types of degrees. The OECD provides data on international students enrolled on Bachelor, Master, PhD and short-cycle degrees in OECD host countries.³¹ Figure 21 shows the total number of incoming students in the Study in Europe region per degree type and how this has developed over time. **The large majority of international degree students from outside the region are enrolled in Bachelor's or Master's programmes** (respectively 44% and 43% in 2022). **Since 2021, Bachelor's students outnumber Master's students for the first time**, although by a small margin. In the 10 years between 2013 and 2022, both degree types saw international enrolments more than double.

The number of PhD students increased at a similar rate to Bachelor's and Master's students, reaching almost 113,000 international **PhD students** in 2022 (+130%). This represents **9% of total international enrolments in the Study in Europe region**. Compared to other degree types, the growth in short-cycle education over the last decade was more modest (+43% since 2013). Short-cycle students accounted for 4% of all international enrolments in 2022 (51,000).

31 These data are not available for Liechtenstein, North Macedonia or Serbia, as these are not OECD member countries.

Figure 21. Incoming students in the Study in Europe region per degree type between 2013 and 2022 (excluding mobility from within the region).

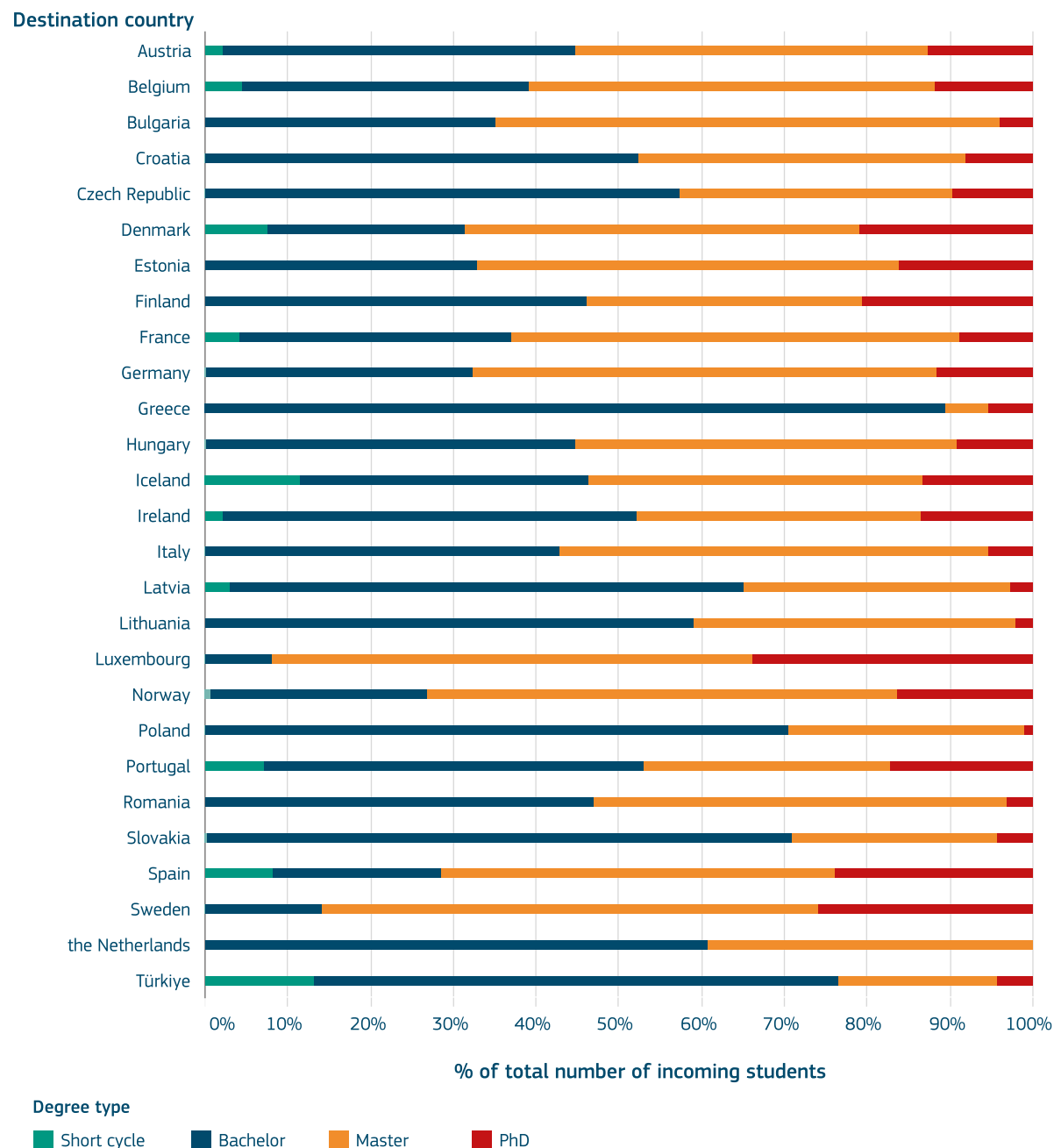


Source: OECD stats, 2025.

Notes: Mobile students for whom the origin or destination country is unknown are excluded from this figure. There is no degree type reported for 21,520 incoming students from outside the Study in Europe region in 2022 (1.7% of the total). The total number of PhD students is likely to be an underestimate as no data is available on international PhD students in the Netherlands.

Looking at the country level, Figure 22 shows that **the distribution of international students across the four degree types varies widely within the Study in Europe region. In nine of the 33 constituent countries, over half of the international students were studying at Bachelor level in 2022:** Greece (89%), Slovakia (71%), Poland (70%), Türkiye (63%), Latvia (62%), the Netherlands (61%), Lithuania (59%), Czechia (57%), and Croatia (52%). Other countries have a larger percentage of students pursuing postgraduate degrees. **In eight countries, over half of the international students were studying at Master level in 2022:** Bulgaria (61%), Sweden (60%), Luxembourg (59%), Norway (57%), Germany (56%), France (54%), Italy (52%), and Estonia (51%). Countries with relatively high proportions of international students pursuing a PhD include Luxembourg (34%), Sweden (26%), Spain (24%), Denmark (21%), and Finland (21%). Regarding short-cycle programmes, Türkiye shows the highest proportion (13%), followed by Iceland (11%).

Figure 22. Percentage of incoming students by degree type per host country in 2022 (excluding mobility from within the region).



Source: OECD stats, 2025.

Notes: Mobile students for whom the origin or destination country is unknown are excluded from this figure.

The Netherlands does not provide data on PhD students. Data for the Netherlands excludes the Dutch Caribbean islands (Aruba, Curaçao and Sint Maarten). See also **Annex** (Table A3).

Box 5. Joint Master's programmes through Erasmus Mundus

Erasmus Mundus Joint Masters are prestigious, EU-funded, Master's degrees jointly designed and delivered³² by higher education institutions across multiple countries. The scheme provides full scholarships for selected students and requires study in at least two participating countries within a single degree programme. It is among the most structured forms of international degree mobility in Europe and has been in continuous operation since 2004 (European Union, 2024).

Over two decades, Erasmus Mundus has awarded more than 34,000 full scholarships to students from 179 countries. Approximately four in five scholarship recipients have come from outside the EU and associated programme countries (also known as the Study in Europe region), making the scheme one of the most prominent entry points for international postgraduate students into the Study in Europe region. In total, these scholarships have resulted in over 110,000 physical mobility periods across different European institutions.

Participation is open to consortia of institutions, with around 600 tertiary education institutions involved to date. By 2024, 585 projects had been funded, corresponding to 349 distinct joint Master's programmes. These programmes typically involve collaboration between three or more universities, with a growing number also engaging non-European partners. Programmes are selected through a centralised, competitive call for proposals, and are required to demonstrate integrated curriculum design, common admission and selection processes, coordinated student services, and in many cases, the awarding of joint or multiple diplomas.

The structured nature of Erasmus Mundus mobility distinguishes it from both credit mobility and typical degree-seeking pathways. Students enrolled in these programmes are required to change their study location at least once, often spending one year in each of two different countries, with additional mobility in some cases. This compulsory mobility pattern contributes to stronger intra-European movement and extended duration of stay compared to single-country degrees.

Although Erasmus Mundus represents only a small share of total international enrolments in Europe, its design has several implications for student recruitment and retention. The availability of full scholarships makes it accessible to academically strong candidates from a wide range of countries, including those with limited financial means. The average programme duration of two years, combined with multi-country exposure and integrated student support, increases the likelihood of longer-term settlement or return mobility. Alumni surveys indicate that about one third of graduates remain in Europe for work or further study immediately following completion of the programme. The key areas of individual impact reported by graduates are intercultural skills (78%), career prospects (69%), personal growth (66%), positive views of Europe (62%), and deeper subject expertise (59%).

In addition to the direct benefits for students, Erasmus Mundus has supported the internationalisation of the participating institutions themselves. Surveyed universities report lasting benefits in terms of curriculum reform, staff mobility, and sustained partnerships. These institutional effects contribute indirectly to the broader visibility and attractiveness of European tertiary education.

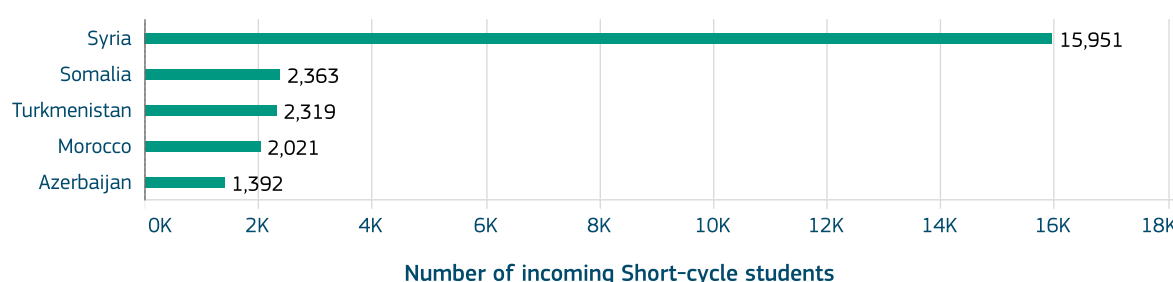
32 Joint degree programmes are collaboratively designed and delivered by two or more higher education institutions, often from different countries. European universities offer a wide variety of joint programmes outside of the Erasmus Mundus scheme. However, there is currently no data available on the total number of joint programmes offered across the Study in Europe region, or the number of international students enrolled on these programmes.

Overall, Erasmus Mundus shows how publicly funded, coordinated degree programmes can contribute to both the quantitative and qualitative aspects of international student mobility. While its scale is limited, it consistently attracts postgraduate students to Europe and fosters longer stays and deeper engagement with Europe through its design.

Top countries of origin per degree type

As seen above, **short-cycle programmes** generally attract fewer students than the other degree types. By far the largest number of short-cycle enrolments in 2022 originated from Syria (16,000; Figure 23a), equivalent to about one in five Syrian students in the Study in Europe region. Almost all Syrian students pursuing short-cycle education do so in Türkiye (98%). Short-cycle programmes may offer an accessible transition into European tertiary education for students whose previous education was disrupted, for example due to fleeing conflict. This could similarly apply to students from Somalia, who in 2022 constituted the second largest group enrolled in short-cycle education in the Study in Europe region (more than 2,000).

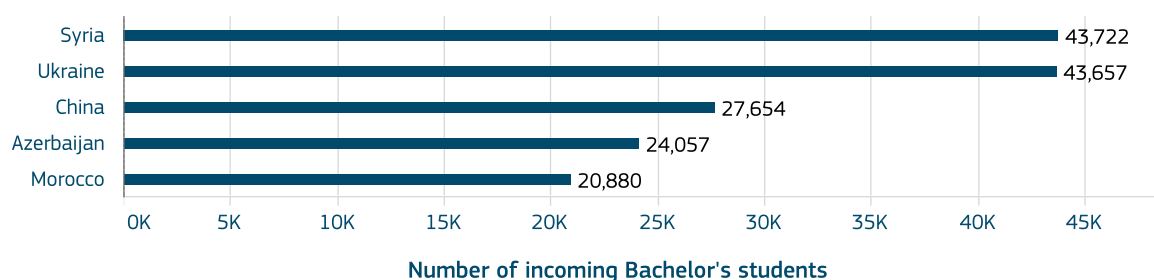
Figure 23a. Top 5 countries of origin for short-cycle students in the Study in Europe region in 2022 (excluding mobility from within the region).



Source: OECD stats, 2025

Syria and Ukraine were the two largest contributors of international **Bachelor's** students to the Study in Europe region in 2022, both with almost 44,000 students enrolled at this level (Figure 23b). This accounts for well over half of both the Syrian and Ukrainian degree student populations in the region. Bachelor's programmes are also popular amongst students from China, Azerbaijan, and Morocco. In 2022, between 20,000 and 28,000 from each of these countries pursued a Bachelor's degree in the Study in Europe region.

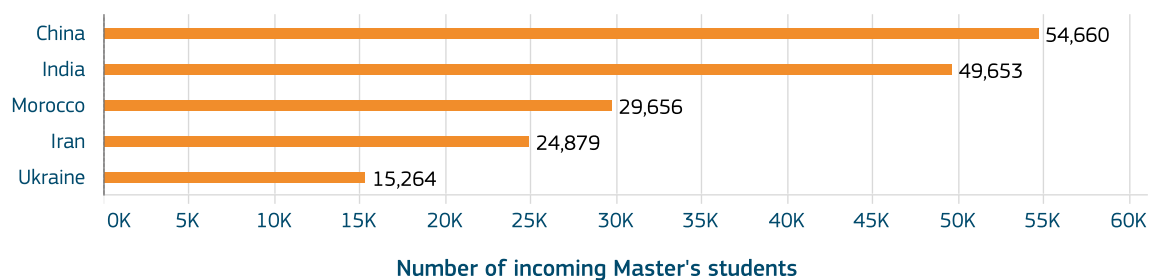
Figure 23b. Top 5 countries of origin for Bachelor's students in the Study in Europe region in 2022 (excluding mobility from within the region).



Source: OECD stats, 2025

China is the leading country of origin for international **Master's** students in the Study in Europe region (Figure 23c). More than 54,000 Chinese students were enrolled on Master's programmes in 2022, roughly twice the number enrolled on Bachelor's programmes (and 55% of the total). Not far behind China is India, with almost 50,000 postgraduate students in 2022: about 70% of all degree-seeking Indian students in the Study in Europe region. Morocco (29,000) and Iran (25,000) follow. In both cases, just over half of their mobile students pursued a Master's degree. Although Ukrainian Master's students are the fifth largest group (15,000) they represent only about a quarter of all degree students from Ukraine in the Study in Europe region.

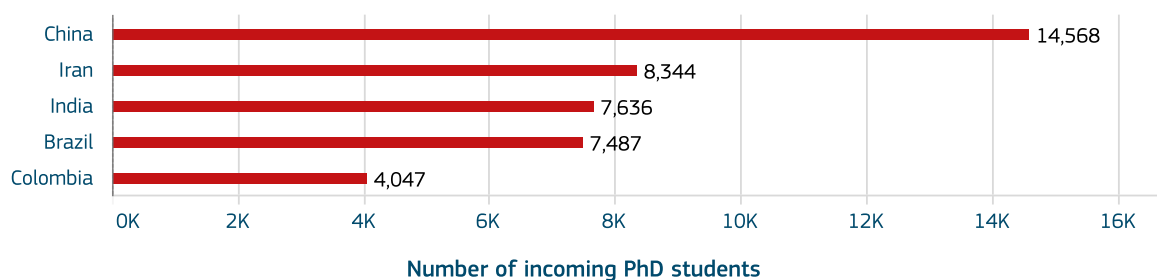
Figure 23c. Top 5 countries of origin for Master's students in the Study in Europe region in 2022 (excluding mobility from within the region).



Source: OECD stats, 2025

Similar to the picture at Master's level, the top five countries of origin at **PhD** level include China (14,600), Iran (8,300), and India (7,600; Figure 23d). In 2022, China was the leading contributor of PhD students in by a considerable margin. About one in seven of all Chinese degree students in the Study in Europe region was enrolled on a PhD program. Notably, PhD programmes attract relatively large numbers of students from Latin America: Brazil (7,500) and Colombia (4,000) were the fourth and fifth main countries of origin for Doctoral students in the Study in Europe region in 2022.

Figure 23d. Top 5 countries of origin for PhD students in the Study in Europe region in 2022 (excluding mobility from within the region).

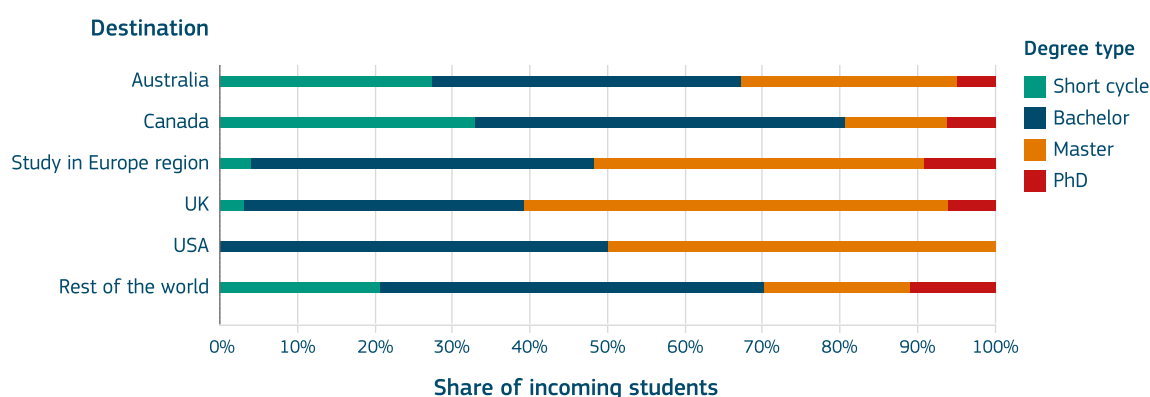


Source: OECD stats, 2025

Distribution of degree types in the Study in Europe region compared to other major destinations

As shown in Figure 24, each of the major global destinations shows a distinct pattern in terms of how its incoming students are distributed over the four tertiary education levels. In 2022, the Study in Europe region had a similar percentage of students at Bachelor level (44%) and Master level (43%), together accounting for almost 90% of all incoming students from outside the region. The USA shows a similar pattern, whereby international students were divided equally over Bachelor's (50%) and Master's (50%) degrees (here it is important to note that the USA does not provide data on short-cycle and PhD students). In the UK, by contrast, the majority of international students were enrolled on Master's programmes (55%), while around one third studied at Bachelor level. Canada records the smallest share of Master's students (about one in 10 enrolments). Australia and Canada stand out due to the prominent position of short-cycle education, accounting respectively for 27% and 33% of the international enrolments in those destinations. In the major destination countries for which data are available, between 5% and 10% of the international students were enrolled on PhD programmes in 2022.

Figure 24. Percentage of incoming students in 2022 by degree type for the major global destinations (excluding mobility from the Study in Europe region).



Source: OECD stats, 2025

Notes: Degree type data is not available for Russia because it is not part of the OECD.

No data are available for PhD and short-cycle degrees for the USA. For comparability between the major destinations, only mobility originating from outside the Study in Europe region is included in this figure. See also **Annex** (Table A4).

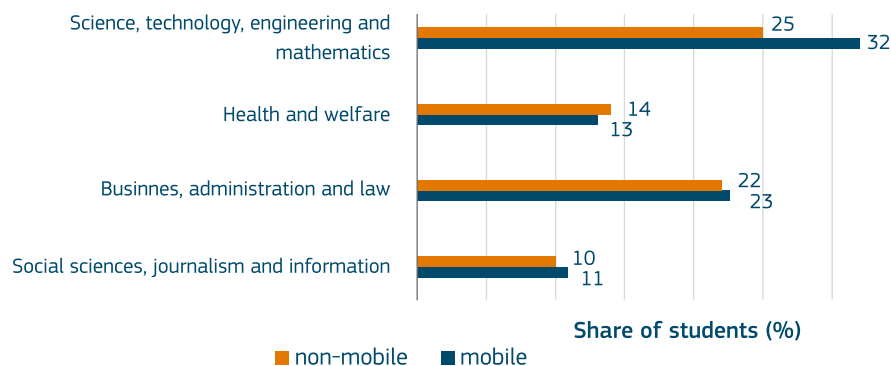
4.1.6. Degree mobility to the European Union by field of study

The OECD dataset used for this fields of study analysis does not include information on the country of origin of mobile students. It is therefore not possible to differentiate intra-European mobility from incoming mobility originating from third countries. In addition, the results reported below concern the European Union rather than the Study in Europe region.

In 2022, almost one-third of degree-mobile students in the EU³³ were studying Science, Technology, Engineering and Mathematics (STEM) subjects (32%; Figure 25). A further one-quarter were enrolled in Business, Administration, and Law (23%), 14% in Health and Welfare programmes, and 11% in Social Sciences, Journalism, and Information. A comparison based on data from 2018 reveals that the distribution of degree-mobile students over the fields of study remained largely stable over five years.

³³ For convenience, this section will refer to European Union member states, but data is lacking for Cyprus and Malta. Data from the 25 other member states of the European Union are taken into account.

Figure 25. Distribution of degree-mobile and non-mobile students in the EU by field of study in 2022 (including intra-EU mobility).

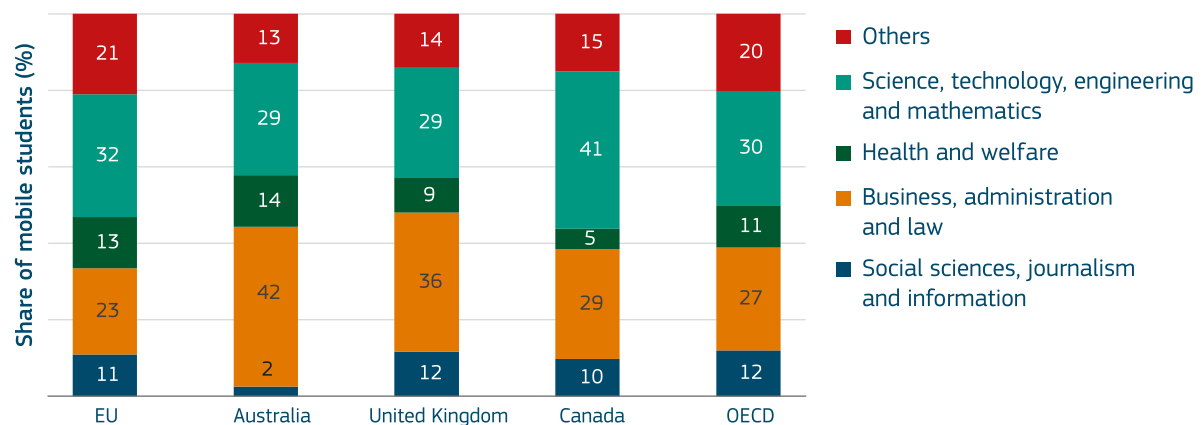


Source: OECD, Education at a glance, 2024.

Mobile students in the EU are highly represented in STEM fields, with 32% of mobile students enrolled in these fields in 2022 compared to 25% of non-mobile students (+7 points). This is true to a lesser extent in Business, Administration, and Law (+1 point), and in Social Sciences and Journalism (+1 point). Conversely, mobile students are less represented than their non-mobile peers in Health and Welfare (-1 point) and in other fields (-7 points).

Mobile students in the EU are more evenly distributed across all fields of study than in other major host countries (Figure 26).³⁴ For example, in Australia, 42% of mobile students in 2022 were enrolled in Business, Administration, and Law, while in the United Kingdom, 36% chose these disciplines. In Canada, STEM programmes accounted for 41% of all international enrolments. In the EU, no single discipline accounts for more than a third of international enrolments.

Figure 26. Distribution of degree-mobile students by field of study in the EU (including intra-EU mobility) and other major destinations in 2022.



Source: OECD, Education at a glance, 2024.

STEM was the most popular field for mobile students in most EU member states in 2022, with notable peaks in Finland (46%), Germany (51%), and Sweden (46%), all well above the EU25 average of 32% (Figure 27)³⁵. Compared to other fields, STEM programmes offer mobile students better employment prospects and transferable skills, and tend to be less dependent on proficiency in the local language (European Commission, 2025). Attracting international STEM talent is a key priority for the EU and a cornerstone of the

³⁴ No data on fields of study are available for the USA or Russia.

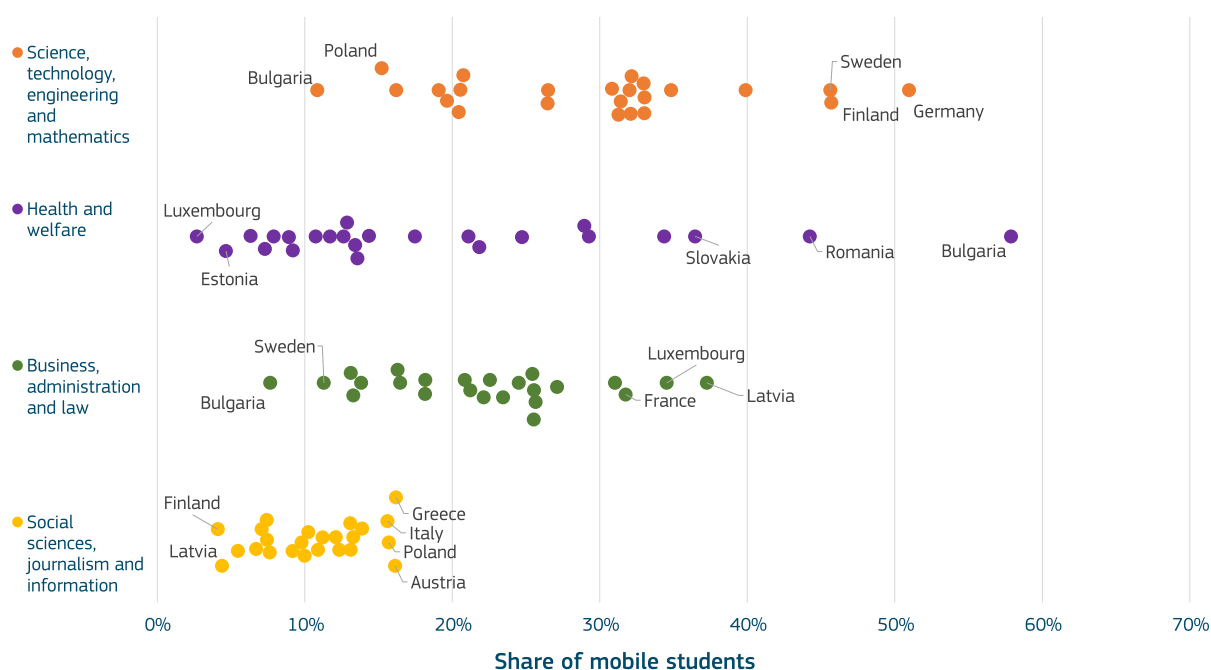
³⁵ Field of study distribution per EU25 country provided in **Annex** (Table A5).

Union of Skills, which highlights the strategic importance of STEM skills for the EU's global competitiveness, innovation capacity and economic resilience.³⁶

Health and Welfare programmes were especially popular amongst mobile students in Bulgaria (58%), Romania (44%), Belgium (34%), and Lithuania (29%), all significantly higher than the EU25 average of 13%. The availability of medical programmes in English or French in these countries likely contributes to their attractiveness.

Business, Administration, and Law programmes are consistently popular among mobile students in the EU. In 2022, this field was the top choice for mobile students in Latvia (37%), Luxembourg (35%), Poland (27%), Spain (26%), and Portugal (26%). Across the EU, the field of Social Sciences, Journalism and Information generally attracts fewer mobile students. While accounting for 16% of the mobile students in Greece, Italy, and Poland, the discipline did not rank as the most popular in any EU member state in 2022.

Figure 27. Distribution of degree-mobile students by field of study per EU receiving country in 2022 (including intra-EU mobility).



Source: OECD, Education at a glance, 2024.

4.1.7. Retention of international graduates

When international students remain in their host country after graduating and join the workforce, they contribute to the local economy (e.g., as taxpayers and consumers) and can help to ease labour and skills shortages. Compared to highly educated workers who received their degree elsewhere, international graduates have an advantage of “pre-integration” in the local labour market, for example through internships and part-time employment during their studies (Ziguras & Law, 2006; OECD, 2022). Furthermore, their tertiary education credentials are easily recognisable to employers (Robertson, 2013), and they are likely to have pre-existing knowledge of the local language (Crossman, Lu and Hou, 2022). In the longer term, international graduates have been shown to have a higher earning potential than migrants with foreign degrees (Canada; Crossman et al., 2022), and domestic graduates (the Netherlands; Nuffic, 2025a).

36 The Union of Skills (March 2025). eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX%3A52025DC0090

Retention as a policy objective in the Study in Europe region

Retaining international students is a strategic priority under the Union of Skills' fourth pillar: Attracting, developing and retaining talent.³⁷ The EU proposes improved career pathways, streamlined visa and residence procedures, enhanced qualification recognition, and stronger integration support to ensure that international graduates, especially in STEM fields, can thrive and contribute meaningfully to the EU's innovation and competitiveness.

Retaining international talent is also of strategic importance at a national level in the Study in Europe region, amid concerns about population decline and a shortage of skilled workers. This is reflected in **national targets and strategies**, such as the Latvian government's aim to increase the proportion of international graduates remaining in the country to 10% by 2030 (OECD 2022). The German Academic Exchange Service (DAAD) has recommended a national strategy to double the number of graduates living and working in Germany 10 years after completing their studies, to 50,000 by 2030 (DAAD, 2023). Increasing student retention is also central to the French government's *Bienvenue en France* strategy.³⁸

At the policy level, Study in Europe countries adopt multifaceted approaches to support the retention of international talent. The **European Student and Researchers Directive (2016)** states that students and researchers have the right to stay for at least nine months after finishing their research or studies to look for work or set up a business in the European Union (European Union, 2016). Some national governments offer international graduates a longer job-seeking period. In eleven countries³⁹ including the Netherlands (Immigration and Naturalisation Service, 2025), Slovenia, and Portugal, new graduates are permitted to stay and look for work for up to 12 months, while Germany grants non-EU graduates a period of 18 months in which to find employment.⁴⁰ This increases to three years for graduates of state-approved tertiary education programmes in Denmark (Danish Agency for International Recruitment and Integration, 2025). In Finland and Ireland,⁴¹ international graduates can still apply for a job search permit up to five years after their student visa has expired, making it possible to leave the country after graduating and return later (Finnish Immigration Service, n.d.; Irish Immigration Service, n.d.).

In Estonia, international graduates may stay in the country to look for a job for as long as they wish, provided they apply for a professional residence permit once they have found a job. Similarly, Belgium, Lithuania, and Sweden grant international graduates free access to the labour market during the transition period between the study visa and the residence visa, which allows them to stay permanently (Thomas More University of Applied Sciences, n.d.; Pumpkin Abroad, n.d.; Swedish Migration Agency, n.d.). Czechia allows tertiary education graduates to enter the job market without any restrictions (AWA Partners, 2023).

In addition, several states including Italy, Germany, and Finland, are working to streamline visa and work permit processes, reduce bureaucratic obstacles, and accelerate residence permit approvals.

Beyond addressing legal and administrative barriers, some countries like Czechia, Italy, and Finland focus on **language training and cultural orientation** to help retain talent, and offer preparatory courses and integration services for international graduates. Austria, Italy, and Germany also provide **career counselling, job placement programmes, and networking events** through universities and National Agencies to connect international graduates with employers.

37 The Union of Skills (March 2025): eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX%3A52025DC0090

38 For more information see <https://www.enseignementsup-recherche.gouv.fr/fr/bienvenue-en-france-la-strategie-d-attractivite-pour-les-etudiants-internationaux-49178>

39 Other countries with one-year job search permit: Austria, Belgium, Croatia, France, Italy, Norway (requires proof of financial means), Spain and Sweden.

40 For more information see <https://www.make-it-in-germany.com/en/study-vocational-training/studies-in-germany/prospects-after>

41 Applies only to Master's and PhD graduates in Ireland. See <https://www.irishimmigration.ie/my-situation-has-changed-since-i-arrived-in-ireland/third-level-graduate-programme/>

Retention of international graduates in the Study in Europe region

The following estimates of international graduate retention and employment rates are available for a number of countries in the Study in Europe region:

- Nearly 45% of international graduates remain in Sweden five years after graduating, of which a large proportion have begun postgraduate studies or joined the labour market (Riksrevisionen, 2025).
- In the Netherlands, one quarter of international graduates live and work in the country five years after gaining their degree (Nuffic, 2025a).
- Of the 2015 cohort of international graduates from French universities, around one third were employed residents of France eight years later (Ministère de l'Intérieur, 2025).
- Approximately 61% of international graduates from Irish universities find employment in Ireland (Higher Education Authority, 2022).
- According to German estimates, one third of international graduates are still resident in Germany 10 years after graduating (DAAD, 2023).
- On average, one in five international graduates in Poland goes on to join the Polish workforce (Uni-Italia, 2024).
- In 2019, 38% of graduates were employed in Finland five years after completing their studies there (Finnish National Agency for Education, 2023).
- Survey data indicate that 48% of international students in Czechia intend to stay in the country after graduating to pursue further study or work (Uni-Italia, 2024).

As is clear from the above overview, national retention studies employ **divergent methodologies, reference periods and data sources**, meaning that retention rates are not comparable across countries.

With the aim of providing internationally comparable evidence, the OECD conducted an analysis of graduate retention based on study permit data (OECD, 2022). In almost all OECD countries, international students without free mobility rights require a study permit. The OECD and Eurostat (Eurostat, 2021) collect data from member states on the types of permits that international students receive after their initial study permit expires. Tracing individuals over time, from their first point of entry as international students to their subsequent permit status, provides an insight into staying behaviour and can be used to estimate country-level retention rates.

The most recent comparative retention rates published by the OECD (2022) are based on the cohort of international students who received their first study permit in 2015. The five-year retention rate is the percentage of these students who were recorded in their host country with a valid permit in 2020 (including permits for further study). These data are available for only 16 OECD countries, of which nine within the Study in Europe region. It is important to note that the following results are based exclusively on international students from outside the European Economic Area (EEA). Students from EEA countries do not require a visa to study within the EEA, and therefore do not appear in the OECD dataset.

Amongst the Study in Europe countries with available data, Germany stands out as having the highest five-year retention rate (Table 5). Almost two thirds (63%) of the international students admitted in 2015 are still resident in Germany five years later. Of all the OECD countries included in the study, only Canada has a slightly higher five-year retention rate (64%). Additional analysis shows that around a quarter of the 'stayers' in Germany were still pursuing education five years after receiving their first study permit (OECD, 2022).

Germany is followed by Estonia (50%) and France (43%), with the second and third highest retention rates of the Study in Europe countries for which comparative data are available. Estonia's five-year retention rate also shows the largest increase when compared with results from the 2010 cohort (17% retention after five

years). This indicates the success of Estonia's efforts to boost retention by allowing graduates unlimited time to find a job in the country. Sweden (24%) and the Netherlands (23%) complete the top five, both with around a quarter of international students recorded with a permit five years after admission to the country.⁴² To further contextualise these retention rates, it is important to bear in mind that the size of the international graduate population varies widely by country. For example, while Germany and Estonia both have a high retention rate, that the absolute number of retained graduates in Germany is far greater (based on the number of incoming students reported earlier in this chapter).

The five-year retention rates for Slovenia, Italy, Norway and Denmark are considerably lower, ranging from 10% to 14%. In addition, Italy and Norway were the only two Study in Europe countries in the OECD study for which the five-year retention rate decreased over time. Compared to the cohort of 2010, international students admitted to Italy and Norway in 2015 were less likely to still be resident in the country after five years. For all other Study in Europe countries with available data, the 2015 cohort had a higher rate of retention.

Table 5. Comparative five-year retention rates for countries in the Study in Europe region with available data (2010 and 2015 cohorts).

	Percentage of cohort with a valid permit 5 years after receiving first study permit (%)	
	2010 cohort	2015 cohort
Germany	54	63
Estonia	17	50
France	34	43
Sweden	N/A	24
Netherlands	22	23
Slovenia	N/A	14
Italy	17	13
Norway	20	11
Denmark	5	10

Source: OECD Secretariat calculations, 2022 (<https://stat.link/z43hbm>)

Note: No data are available for 2010 cohorts in Sweden and Slovenia.

Limitations of OECD retention analysis

There are several limitations associated with using permit data to measure retention rate (that is, the share of international degree students remaining in their host country, X number of years after graduation). Firstly, study permit records do not typically include information on the year of graduation, or indeed whether the permit holder graduated at all. Secondly, many countries do not make a distinction between study permits for short-stay (e.g., credit mobile) international students and students enrolled for a full degree programme. This makes it impossible to exclude short-stay students from the retention analysis. Finally, in some cases, individuals who gain citizenship in their host country no longer appear in the permit data, leading to an underestimate of the actual retention rate. For these reasons, permit data can only offer an approximation of post-study staying behaviour.

⁴² The data for France and the Netherlands do not include study permit holders who subsequently become citizens. The retention rates for these countries are thus likely to be an underestimate.

It is also important to note that only international students who require a permit to study in the host country appear in permit statistics. Since students moving within a free mobility zone (in this case the EU/EEA) do not require a study permit, they are by definition excluded from the OECD's calculations.

A related point to bear in mind is that there is not a one-to-one relationship between the reference population for the OECD retention analysis and the population under study in the rest of this chapter (i.e., international students from *outside* the Study in Europe region). Not all countries in the Study in Europe region are also part of the EU/EEA free mobility zone.⁴³ Students from these countries require a study permit to study in EU/EEA countries, and are thus included in the OECD retention calculations (see Table 4 above).

Employment rates of international students remaining in the host country

The OECD (2022) presents synthesised data on the employment rates of migrants who arrived for education (i.e., previous international students) in selected host countries, five years after entry. For comparison, the employment rates among migrants who arrived in the country for work (i.e., labour migrants), and among the native-born population are also reported (Table 6). The results show that in France, Italy, and Spain, the employment rate among migrants who arrived for education is between four and 10 percentage points higher than that of the native-born population. In Germany, the employment rates for these two groups are almost the same. Of the countries reported, only Sweden has a higher employment rate among its native-born population.

Based on the available data, labour migrants tend to have higher employment rates after five years than international students remaining in the country (with the exception of France). This is not a wholly unexpected finding, as applicants for a work permit have typically received a job offer in the host country.

Table 6. Employment rates of previous international students and labour migrants five years after arrival in the host country, and of the native-born population (2021; selected countries for which data is available).

	Employment rate (%)		
	Arrived for education	Arrived for work	Native-born
Germany	77.5	81.1	77.8
France	75.4	73.4	67.2
Italy	68.2	74.9	58.1
Spain	67.5	72.1	63.1
Sweden	72.4	84.1	77.9

Source: OECD Secretariat calculations on the basis of data from the European Labour Force Survey (EU-LFS); OECD (2022)

4.2. Outgoing degree mobility

In 2022, a total of 864,000 degree students from the 33 Study in Europe countries were internationally mobile (UOE, 2025). **Two thirds of all mobile students went to another country within the Study in Europe region (65%), while the remaining third pursued their degree outside of the region (35%).**

⁴³ Türkiye, Serbia, North Macedonia are included in the Study in Europe region but are not part of the EU/EEA.

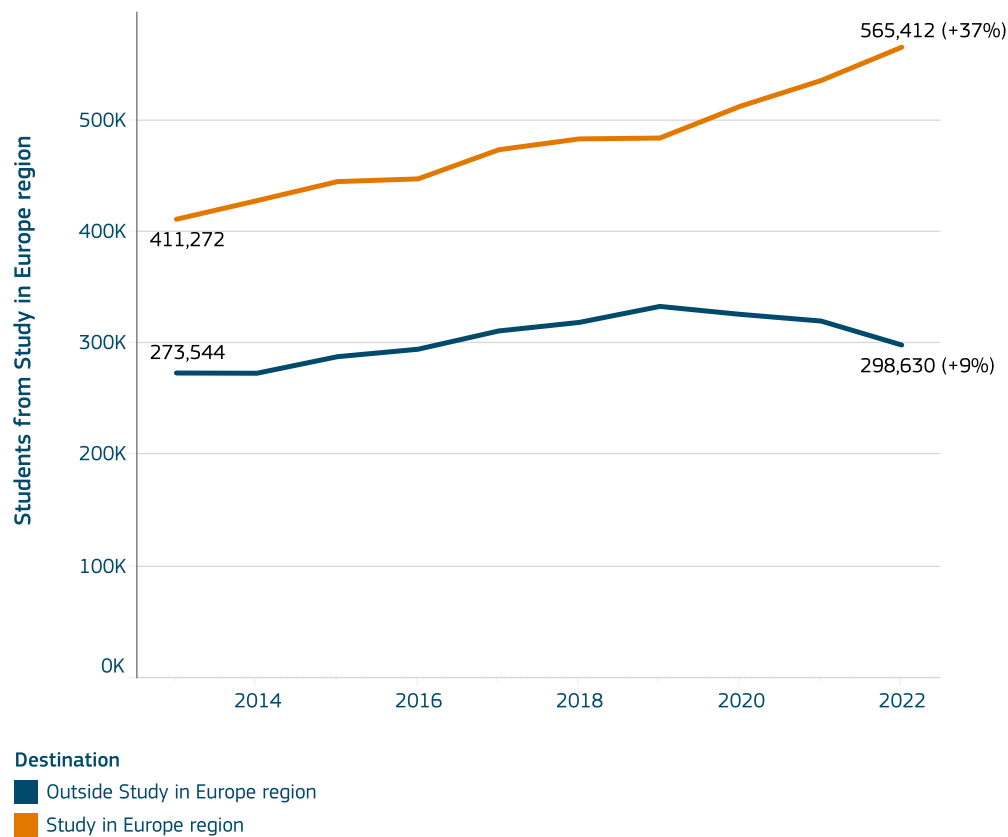
4.2.1. Total numbers by destination region

In 2022, about 565,000 mobile students from the Study in Europe region pursued a degree within the region, compared to about 411,000 students 10 years earlier (+37%; Figure 28). **A further 299,000 degree-mobile students from the Study in Europe region chose a study destination outside of the region in 2022.** In 2013 this was 273,000 students, representing a **9% increase over 10 years**.

Between 2013 and 2019, the number of degree-mobile students from the Study in Europe region increased, both to destinations within and outside the region. After 2019, however, the two trajectories diverge (Figure 28). **While degree mobility within the region continued to grow at an even faster pace, there was a decrease in the number of mobile students leaving the Study in Europe region.** The fall in numbers between 2020 and 2022 can partly be explained by restrictions on travel to many countries outside of the Study in Europe region during the COVID-19 pandemic. This may also have led to the observed increase in degree mobility within the Study in Europe region in the same period, as more students chose to stay closer to home.

Looking at outgoing degree mobility from other comparable regions, we see that the USA and Canada experienced shrinkage in 2021 due to COVID-19, while the volume of outbound students from Australia and the UK remained stable.

Figure 28. Total outgoing degree mobility from the Study in Europe region between 2013 and 2022 (including mobility within the region).



Source: UIS and OECD stats, 2025

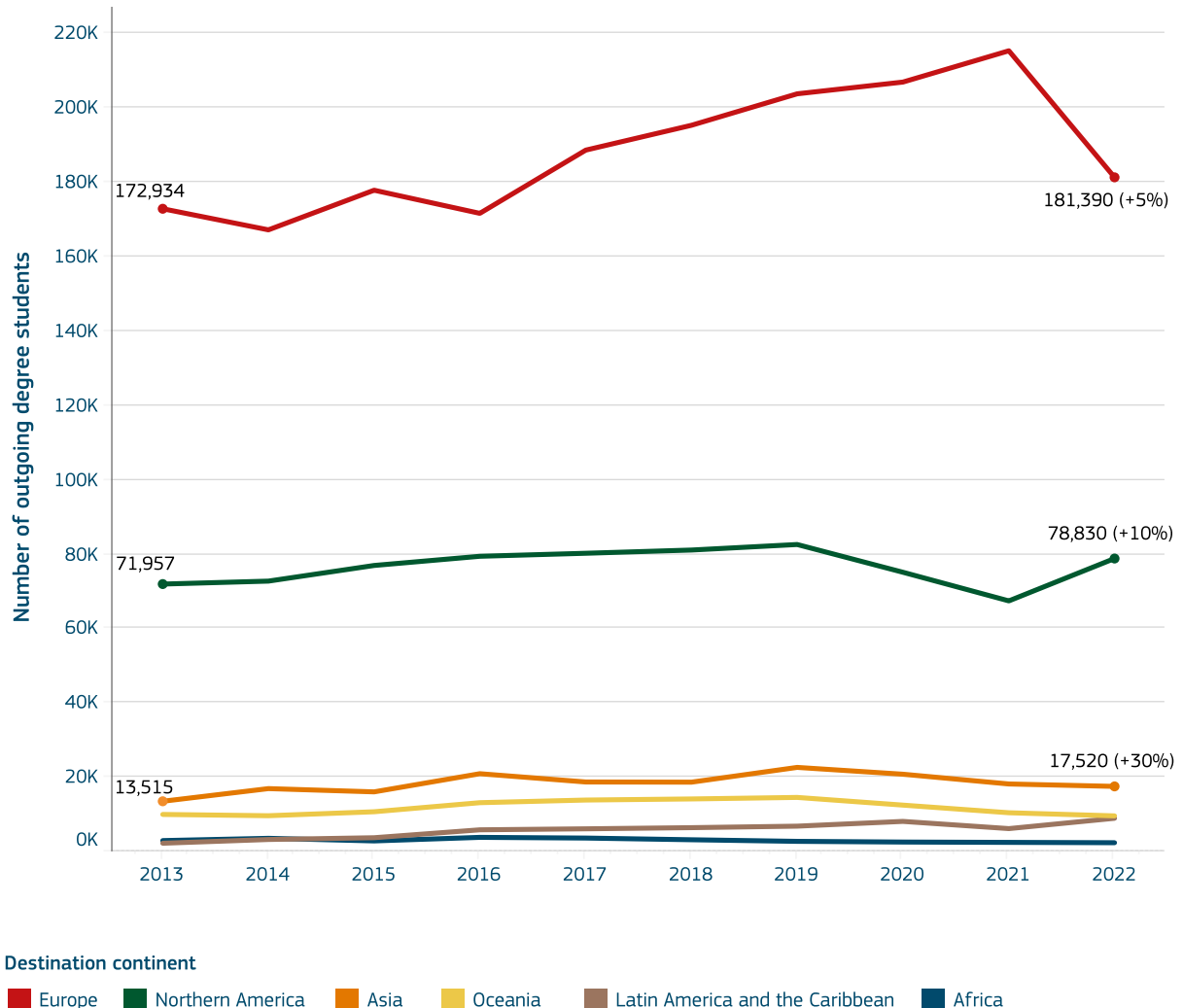
Note: Mobile students for whom the origin or destination country is unknown are excluded from this figure.

When students from Study in Europe countries study outside the region, many of them nevertheless choose to remain on the European continent (61%; Figure 29). In 2022, about 181,000 students from the Study in Europe region were enrolled in non-Erasmus+ Programme countries in Europe: United Kingdom, Switzerland, Bosnia and Herzegovina, Moldova, Albania, San Marino, Monaco, and Belarus (from most to least popular). The number of Study in Europe students going to European countries outside the region increased by 5% in the 10 years to 2022 (almost 9,000 more students). However, 2022 saw a sudden drop in numbers, amounting to almost 40,000 fewer students compared to 2021. This aligns with the UK's withdrawal from the EU in 2021. Given that the UK is a major destination for degree mobility from the Study in Europe region, the contraction in EU student mobility to the UK as a result of Brexit can be expected to have a visible impact on student flows at the continental level (see next section for more analysis relating to Brexit).

The second most popular continent of destination among degree-seeking students from the Study in Europe region is North America. In 2022, there were about 79,000 Study in Europe students pursuing tertiary education in North America, almost 10% more than in 2013 (+7,000 students). Degree mobility from the Study in Europe region to North America declined in 2020 and 2021 during the COVID-19 pandemic. Although not yet at pre-pandemic levels, signs of recovery are visible in 2022.

Asia completes the top three destination continents, receiving about 18,000 degree-mobile Study in Europe students in 2022. **This number increased by almost 30% between 2013 and 2022** (+4,000 students). Oceania follows, hosting around 10,000 students in 2022, with almost no change over time. Although still small in absolute terms, Latin America and the Caribbean show the fastest growth in degree student numbers from the Study in Europe region in the period following 2013. In 2022, there were about 9,000 Study in Europe students enrolled in Latin America and the Caribbean, four times more than in 2013. Finally, Africa is the continent with the fewest degree students from the Study in Europe region, and shows almost no change over time.

Figure 29. Total outgoing degree mobility from Study in Europe region by destination continent over time (excluding mobility within Study in Europe region).



Source: UIS and OECD stats, 2025

Note: Mobile students for whom the origin or destination country is unknown are excluded from this figure.

4.2.2. Top 15 destination countries outside the Study in Europe region

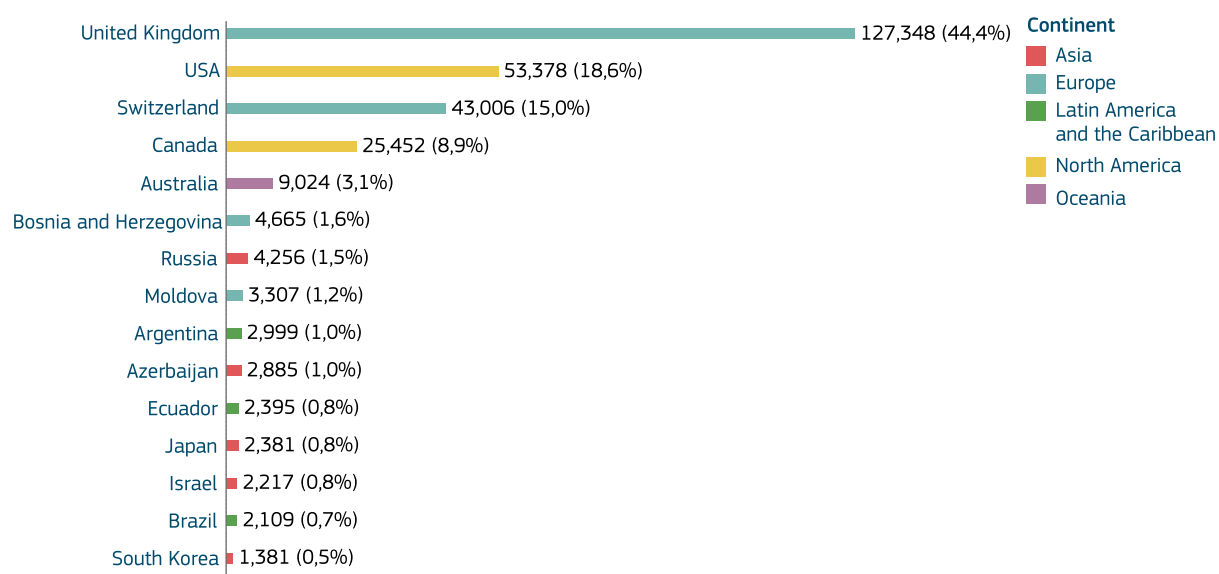
More than 127,000 degree students from the Study in Europe region were enrolled in the United Kingdom in 2022, equivalent to 44% of all students from the region going abroad for a degree. Although the UK remained the most popular destination among degree-mobile students in 2022, **its popularity appears to be in decline.** Between 2020 and 2022, the share of outbound Study in Europe degree students studying in the UK decreased from 50% to 44% (about 27,000 fewer students). This is most likely related to Brexit, which caused a substantial increase in university tuition fees for EU students enrolling after 1 January 2021, as well as new visa requirements.

The **second most popular destination country** for degree-mobile Study in Europe students is the **United States of America**, which **hosted more than 53,000 degree students from the region in 2022 (19% of the total).** The proportion of students from the Study in Europe region pursuing a degree in the USA increased from 16% to 19% between 2021 and 2022 (+5,000). It is possible that a share of the EU students who would otherwise have gone to the UK chose instead to study in the USA in 2022 due to Brexit. Another likely contributing factor was the USA's reopening to foreign students in 2022, following the COVID-19 pandemic.

Switzerland is in third place with about 43,000 degree-mobile students from the Study in Europe region in 2022, amounting to 15% of the total. Other popular destinations for degree students from the Study in Europe region are **Canada**, hosting more than 25,000 students in 2022, and **Australia**, with about 9,000 students (Figure 30).

The abovementioned trends reveal that Study in Europe students tend to choose English-speaking countries or/and neighbouring countries with renowned higher education institutions.

Figure 30. Top 15 receiving countries with the largest absolute number of degree students from the Study in Europe region in 2022 and their share of all outgoing students (excluding mobility within the Study in Europe region).



Source: UIS and OECD stats, 2025

Note: Mobile students for whom the origin or destination country is unknown are excluded from this figure.

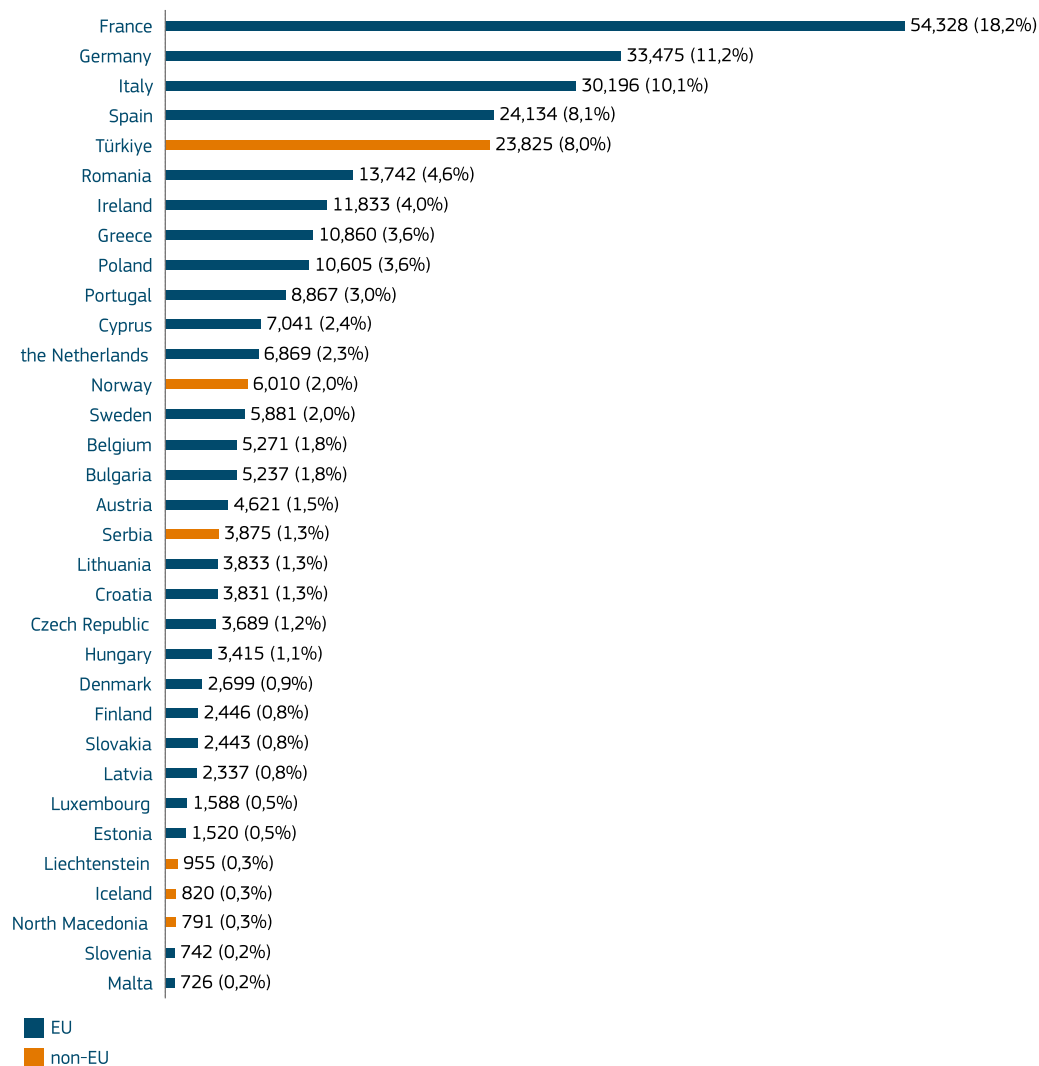
4.2.3. Top countries of origin in the Study in Europe region

Of the Study in Europe countries, France has the largest number of mobile students studying for a degree outside of the region (Figure 31). In 2022, this amounted to 54,000 degree-seeking students from France, representing **almost 18% of all outgoing degree mobility from the Study in Europe region**. The top non-Study in Europe countries of destination for students from France in 2022 were Canada, Switzerland, and the United Kingdom. The popularity of Canada and Switzerland amongst French degree students can in part be attributed to the shared language.

Germany is the second largest country of origin in the Study in Europe region, sending more than 33,000 degree students in 2022 (about 11% of all outgoing mobility from the region). Students from Germany mainly choose destinations such as Switzerland, the UK, and the USA.

The top five is completed by Italy (sending more than 30,000 students), **Spain** (more than 24,000), and **Türkiye** (almost 24,000; Figure 31). For students from these three countries, the following destinations are popular: the UK, Switzerland, and the USA for students from Italy; the UK, the USA, and Ecuador for students from Spain; and the USA, the UK, and Azerbaijan for students from Türkiye.

Figure 31. Absolute number and relative share of outgoing degree students from Study in Europe countries in 2022 (excluding mobility within the Study in Europe region).



Source: UIS and OECD stats, 2025

Notes: Mobile students for whom the origin or destination country is unknown are excluded from this figure.

Data for the Netherlands do not include outgoing degree students from the Dutch Caribbean islands (Aruba, Curaçao and Sint Maarten).

Outgoing degree mobility relative to the total student population

In this section, we examine the number of outgoing degree students per country of origin in the Study in Europe region in relation to the total student population of that country (Figure 32). This relative indicator provides a more nuanced picture of participation across the Study in Europe region than student numbers alone, since countries with large student populations have a larger pool of students who can pursue a degree abroad.

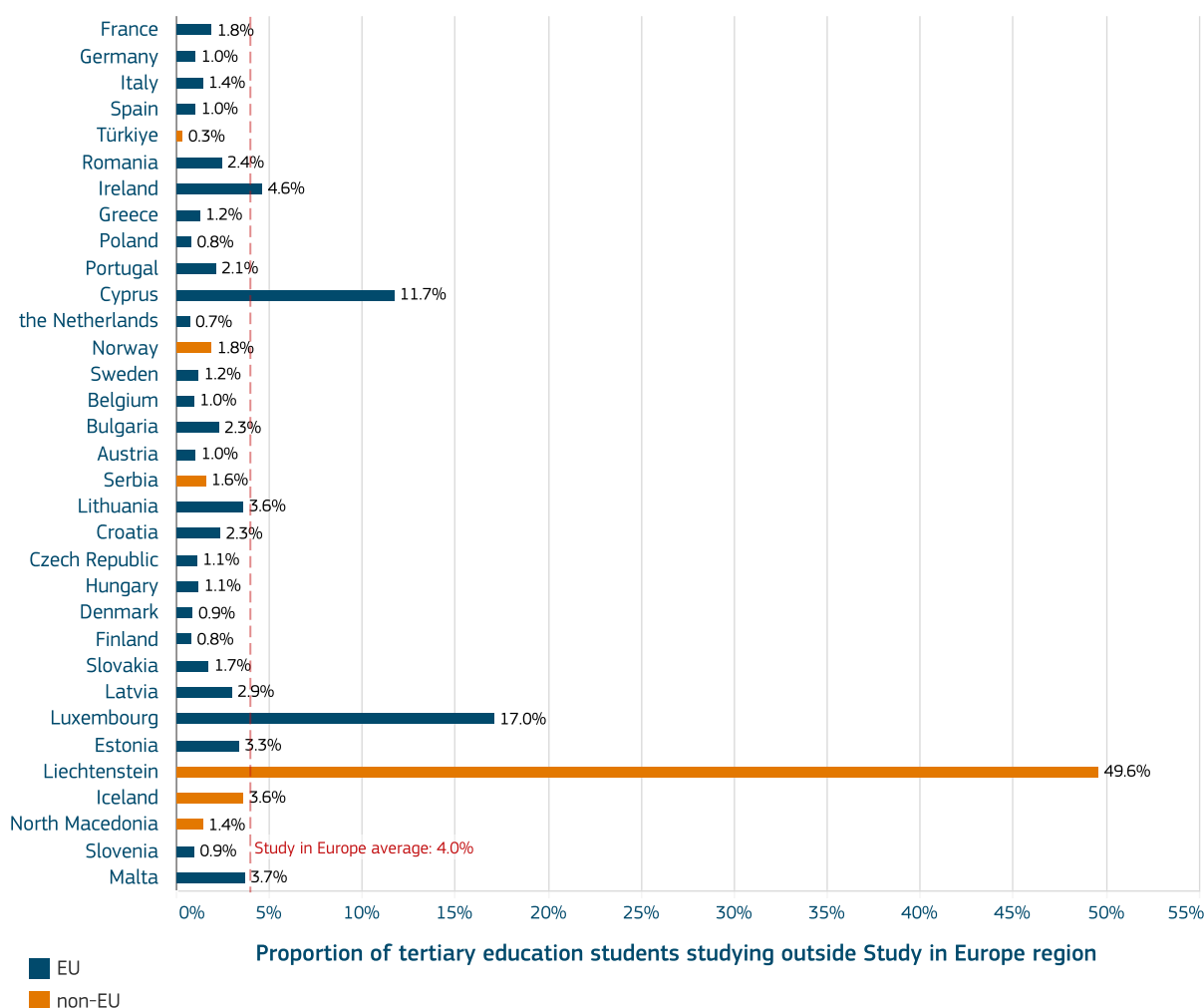
France, for example, had the largest number of degree students studying outside the Study in Europe region in 2022 (more than 54,000). However, relative to the total number of tertiary-level students in France (almost three million), the rate of outgoing degree mobility (2%) is lower than the Study in Europe average of 4%.

Similarly, while Germany, Italy, and Spain each sent between 24 and 34 thousand degree-mobile students outside the Study in Europe region in 2022, this represented around one percent of their total student populations, which are also large (two to three million).

Türkiye is a more extreme case, with its tertiary education enrolments totalling more than eight million in 2022. Of all tertiary-level students in Türkiye, less than half of one percent go abroad for a degree to a non-Study in Europe country (about 24,000 students in 2022). Well below the Study in Europe average, participation in outgoing degree mobility (to non-Study in Europe destinations) is less popular in Türkiye than in any other Study in Europe country.

As can be seen in Figure 32, smaller countries such as Lichtenstein, Luxembourg, and Cyprus, have above-average percentages of their students going abroad to non-Study in Europe countries; 50%, 17%, and 12% respectively. This might be due to the limited availability of study programmes in these smaller countries leading students to seek study opportunities elsewhere.

Figure 32. Outgoing degree students from Study in Europe region as a proportion of total student population in 2022 (excluding mobility within the Study in Europe region).



Source: UIS and OECD stats, 2025

Notes: Countries ranked by absolute number of outgoing degree students, from largest to smallest. Proportion is calculated per country of origin as follows: Number of degree students enrolled outside Study in Europe region / (Total national tertiary enrolments + Total number of degree students enrolled abroad)

Mobile students for whom the origin or destination country is unknown are excluded from this figure.

Data for the Netherlands does not include outgoing degree students from the Dutch Caribbean islands (Aruba, Curaçao and Sint Maarten).

4.2.4. Changes over time in outgoing mobility from Study in Europe countries

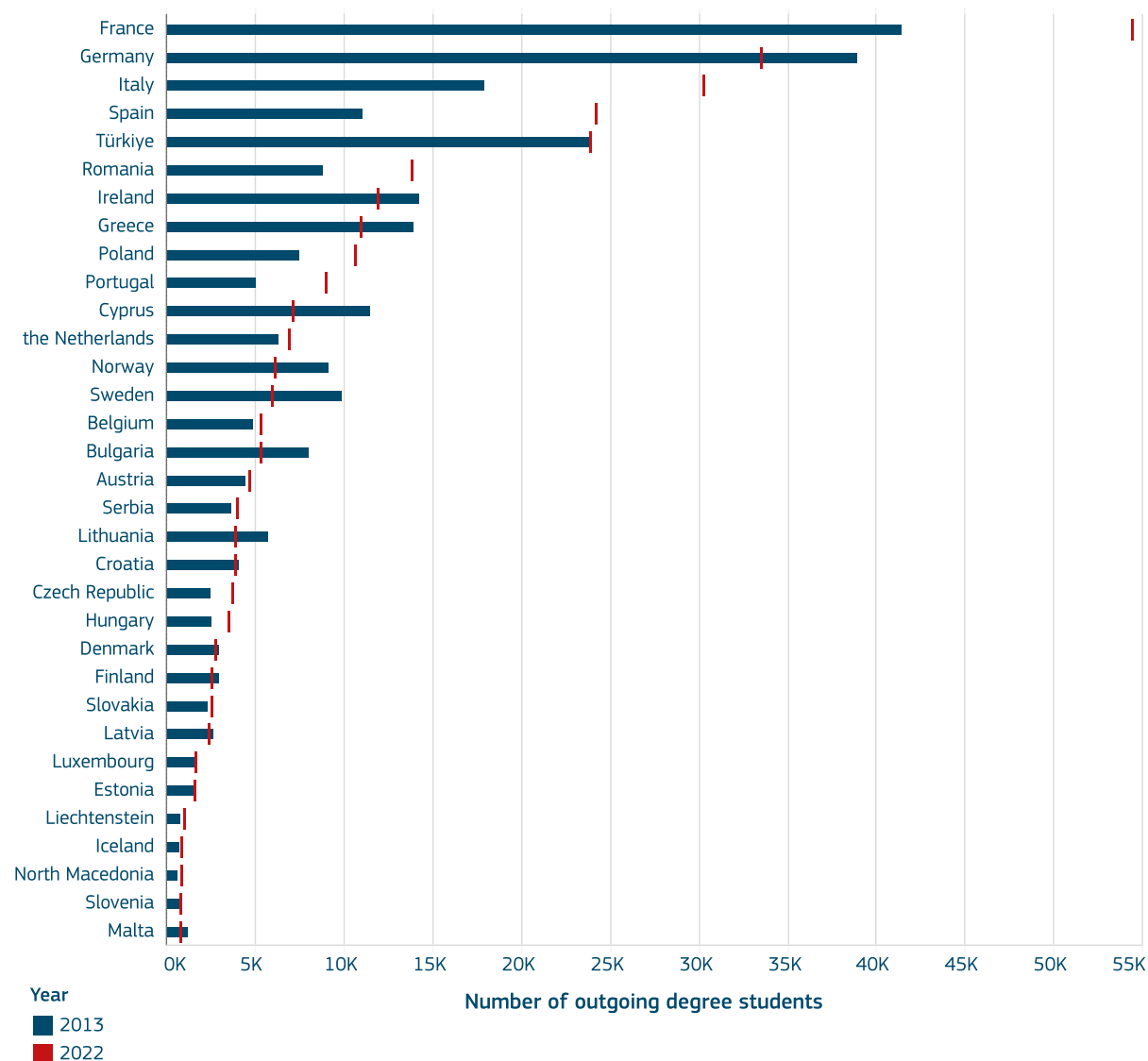
Figure 33 shows the change over time in outgoing degree mobility from the Study in Europe region. **Of the top five largest countries of origin, three have recorded growth in the number of their students pursuing a degree outside of the region.** In the 10 years to 2022, **France** saw outgoing degree mobility to non-Study in Europe countries **increase by about one third** (+13,000 students). In particular, Canada and Switzerland were the fastest growing destinations amongst French degree-mobile students. In the same period, outgoing degree mobility from **Spain doubled** (+13,000). Leading destinations, the UK and the USA attracted more Spanish degree students over time.

Similarly, **Italy** recorded **roughly a 60% increase** in the number of its students leaving the Study in Europe region for a degree between 2013 in 2022 (from about 18,000 students to 30,000). Among Italian degree students, the popularity of the UK, Switzerland, and the USA showed the fastest increase in this period.

In contrast to the substantial growth in outgoing degree mobility from France, Spain, and Italy, **Germany sent 6,000 fewer degree-mobile students to non-Study in Europe countries in 2022 compared to 2013.** Further analysis reveals that the UK in particular has declined in popularity among German degree students in recent years. Compared to 2020 (the year before Brexit took effect), 2022 saw about 3,000 students fewer students from Germany study in the UK. It may be that after Brexit, German students interested in studying abroad were more attracted to other destinations, especially within the Study in Europe region, such as Austria. Indeed, the number of students going from Germany to Austria for a degree increased from about 30,000 in 2020 to about 36,000 in 2022. Proximity and the availability of German-language programmes contribute to the appeal of Austria as a study destination for German degree students.

Countries experiencing a **small increase** in outgoing degree mobility in the 10 years to 2022 were **Romania, Poland, and Portugal**. Countries that observed a **small decrease** over time were **Ireland, Greece, Cyprus, Sweden, Norway, and Bulgaria**. The remaining Study in Europe countries showed very little or no change in outgoing mobility volume in this 10-year period.

Figure 33. Total number of outgoing degree students per country of origin to destinations outside of the Study in Europe region in 2013 and 2022 (ordered by number of outgoing degree students in 2022).



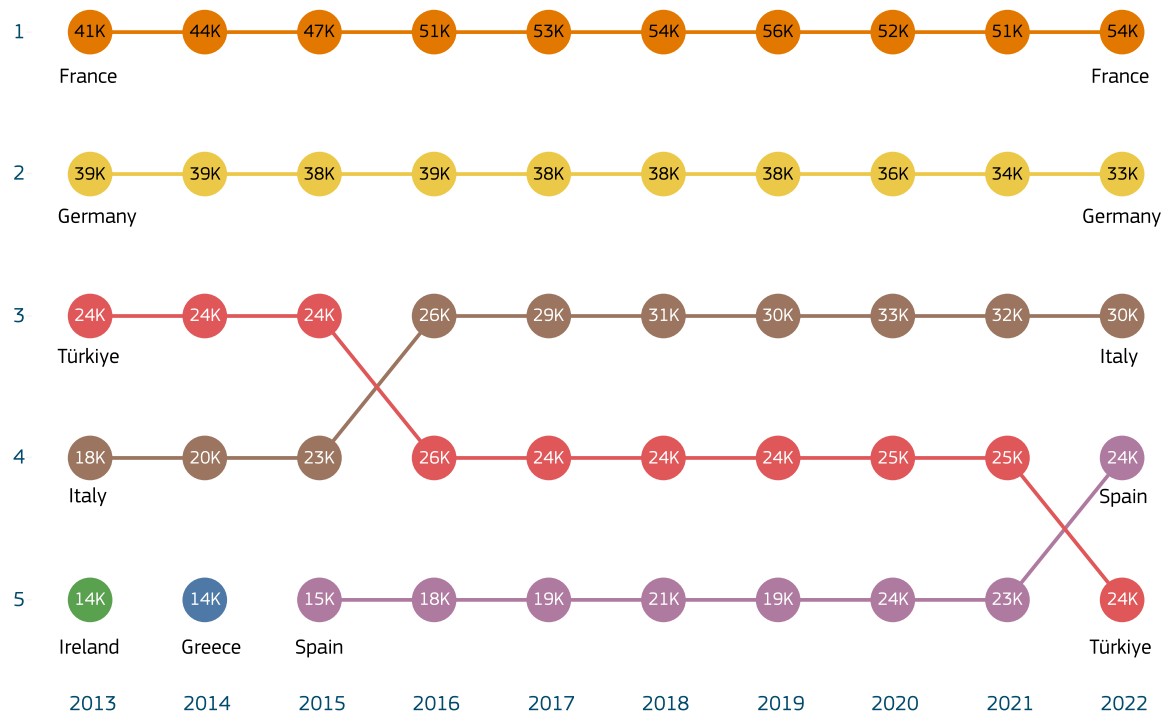
Source: UIS and OECD stats, 2025

Notes: Mobile students for whom the origin or destination country is unknown are excluded from this figure.

Data for the Netherlands does not include outgoing degree students from the Dutch Caribbean islands (Aruba, Curaçao and Sint Maarten). See also **Annex** (Table A6).

The top five countries of origin for outgoing degree mobility in 2013 were France, Germany, Türkiye, Italy, and Ireland (Figure 34). France and Germany have held their place as the leading countries of origin over time, despite declining outbound student numbers from Germany. Ireland left the top five in 2014, followed by Greece in 2015. Since 2015, the third, fourth and fifth positions in the top five have been occupied by Türkiye, Italy, and Spain.

Figure 34. Top 5 countries of origin over time in the Study in Europe region (excluding degree mobility within the Study in Europe region).



Source: UIS and OECD stats, 2025

Note: Mobile students for whom the origin or destination country is unknown are excluded from this figure.

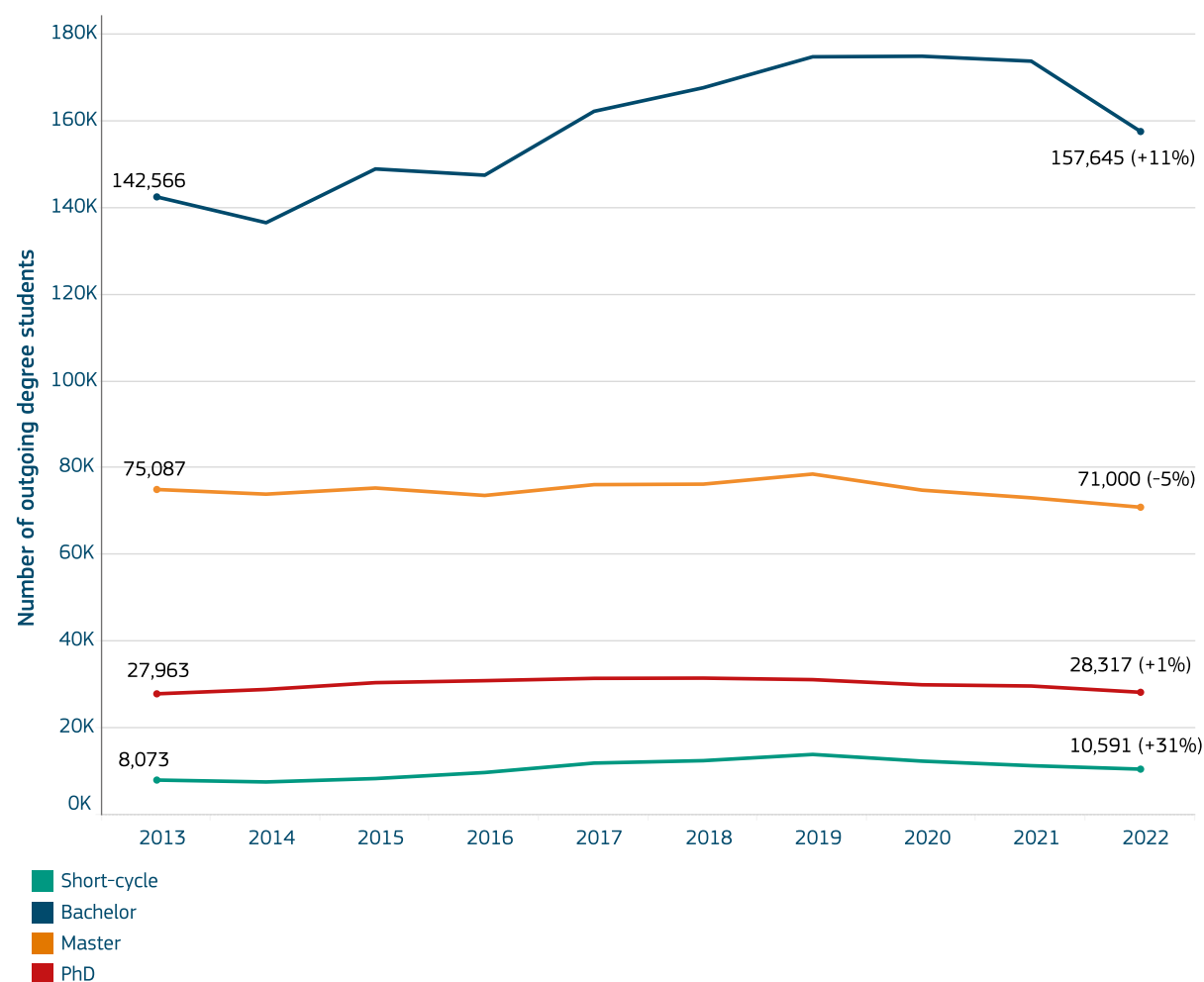
4.2.5. Outgoing degree students from the Study in Europe region by degree type

Outgoing students pursuing a degree outside of the Study in Europe region do so mostly at Bachelor level. Of the 268,000 outbound degree students from the Study in Europe region in 2022, **almost 60% were enrolled in Bachelor's programmes** (about 158,000) and **about a quarter in Master's programmes** (71,000). **Approximately one in 10 students was pursuing a PhD** (about 28,000), while students in **short-cycle education accounted for less than 5% of the total** (almost 11,000).

The number of outbound Bachelor's students increased by roughly 10% in the 10 years to 2022 (+14,000), in line with the overall rate of growth in outgoing degree mobility from the Study in Europe region. As Figure 35 shows, outgoing degree mobility at Bachelor level fluctuated over the years, with periods of rapid growth (notably 2016–2019), followed by stagnation and decline, particularly in 2022. The COVID-19 pandemic and Brexit may account for this recent trend. The coming years will reveal to what extent the numbers recover.

Interestingly, **the other degree types show a much more stable trajectory**, with only small changes in the numbers of outbound students in the 10 years since 2013. While for PhD and short-cycle education, the number of outgoing students in 2022 is slightly higher than in 2013, the opposite is true at Master's level (-4,000). As noted at Bachelor level, 2019 seems to mark a turning point for all degree types, after which the number of students enrolled in countries outside the Study in Europe region stagnates or declines.

Figure 35. Absolute number of outgoing degree students from the Study in Europe region per degree type between 2013 and 2022 (excluding mobility within the region).



Source: OECD stats, 2025

Notes: Data on degree type is only available for destination countries in the OECD. Non-OECD destinations are not included in this figure. The number of students per degree type is therefore an underestimate.

5. Credit mobility to and from the Study in Europe region

Credit mobility is a type of short-term academic exchange whereby a student studies at a host institution abroad and earns academic credits that are then transferred back to their home institution. Credit mobile students participating in study abroad follow courses and take exams in their host institution. Credit mobility can also take the form of an **internship or traineeship** abroad, whereby a student gains work experience, usually relevant to their home study programme, in exchange for academic credits. The **mobility period** is generally **between one semester and one year** but can also be shorter. **Students on credit mobility remain enrolled at their home institution and do not obtain a diploma from their host institution.** Credit mobility requires an agreement and academic recognition between the students' home and host institutions.

Box 6. Types of credit mobility scheme

- Credit mobility through EU-funded programmes: This refers to mobility opportunities financed by the European Union, such as those under Erasmus+. **Erasmus+** is the EU's flagship programme supporting mobility and cooperation in education, training, youth, and sport. It promotes collaboration within Europe and with third countries worldwide, for example through the International Credit Mobility action.
- Credit mobility through other international or national programmes: This category includes mobility schemes not funded by the EU, such as bilateral or multilateral agreements at national or regional levels, as well as institutional partnerships between universities for student exchanges.
- Credit mobility through other arrangements: When students independently arrange a recognised study period or internship abroad that is credited by their home institution. These mobilities are not financed by the EU or by other international/national programmes.

5.1. Incoming International Credit Mobility to the Study in Europe region under Erasmus+

International Credit Mobility (ICM) is a specific action within the Erasmus+ programme that supports the physical and blended⁴⁴ short-term mobility of higher education students and staff to and from third countries not associated to the Erasmus+ programme. This initiative is designed to enhance international cooperation and exchange in the higher education sector by providing opportunities for students in all study fields and cycles to participate in study periods or traineeships abroad. Additionally, it supports higher education academic and administrative staff to engage in teaching or training activities abroad.

Launched as part of the 2014-2020 Erasmus+ programme, International Credit Mobility facilitates short-term student and staff mobilities through agreements between Erasmus+ Programme Countries⁴⁵ and Partner Countries.⁴⁶ This action is part of the broader effort to internationalise and improve educational and training capacities in the EU and beyond, as well as to enhance the skills and employability of students and staff.

⁴⁴ For more information about blended mobility, see **Box 8**.

⁴⁵ Programme Countries refers to the 27 EU Member States and the six associated countries to the Programme, namely Iceland, Liechtenstein, Norway, North Macedonia, Serbia and Türkiye (together referred to as 'the Study in Europe region' in this report)

⁴⁶ Other countries worldwide, grouped in regions 1-14 according to the EU's external financing instruments. Only regions 1 to 12 are eligible to participate in International Credit Mobility. Regions 13 (Andorra, Monaco, San Marino, Vatican City State) and 14 (Faroe Islands, Switzerland, United Kingdom) are not eligible

Under the current Erasmus+ programme period, the projects for international credit mobility last either two or three years, with universities having the freedom to distribute mobilities throughout the project timeline.

Regional approach and budget allocation

International Credit Mobility both to and from the Study in Europe region is fully funded by the European Union's instruments for external relations and cooperation. Eligible Partner Countries (third countries not associated to the Erasmus+ programme) worldwide are grouped into twelve regions,⁴⁷ to which the EU allocates a so-called regional budget "envelope". The composition of the twelve regions is shown in Table 7 and further explained in the Erasmus+ Programme Guide.⁴⁸

Table 7. Erasmus+ regional groupings eligible for International Credit Mobility.

Western Balkans (Region 1)	Albania, Bosnia and Herzegovina, Kosovo, ⁴⁹ Montenegro
Neighbourhood East (Region 2)	Armenia, Azerbaijan, Belarus, Georgia, Moldova, Territory of Ukraine as recognised by international law
South-Mediterranean countries (Region 3)	Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine, ⁵⁰ Syria, Tunisia
Russian Federation (Region 4)	Territory of Russia as recognised by international law ⁵¹
Asia (Region 5)	Bangladesh, Bhutan, Brunei, Cambodia, China, DPR Korea, Hong Kong, Japan, India, Indonesia, (Republic of) Korea, Laos, Macao, Malaysia, Maldives, Mongolia, Myanmar, Nepal, Pakistan, Philippines, Singapore, Sri Lanka, Taiwan, Thailand and Vietnam
Central Asia (Region 6)	Afghanistan, Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan
Middle East (Region 7)	Bahrain, Iran, Iraq, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates, Yemen
Pacific (Region 8)	Australia, Cook Islands, Fiji, Kiribati, Marshall Islands, Micronesia, Nauru, Niue, Palau, Papua New Guinea, New Zealand, Samoa, Solomon Islands, Timor-Leste, Tonga, Tuvalu, Vanuatu
Sub-Saharan Africa (Region 9)	Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Cape Verde, Central African Republic, Chad, Comoros, Congo, Congo - Democratic Republic of the, Côte d'Ivoire, Djibouti, Equatorial Guinea, Eritrea, Eswatini, Ethiopia, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau, Kenya, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mauritius, Mozambique, Namibia, Niger, Nigeria, Rwanda, Sao Tome and Principe, Senegal, Seychelles, Sierra Leone, Somalia, South Africa, South Sudan, Sudan, Tanzania, Togo, Uganda, Zambia, Zimbabwe

47 Note, the Erasmus+ regional classification of Partner Countries is distinct from the UN geoscheme sub-regions referred to elsewhere in this report (and listed in **Annex** Table A7).

48 The Erasmus+ regional classification can be found here <https://erasmus-plus.ec.europa.eu/programme-guide/part-a/eligible-countries>. Regions 1 to 12 are eligible to take part in ICM.

49 This designation is without prejudice to positions on status, and is in line with UNSCR 1244 and the ICJ Opinion on the Kosovo declaration of independence.

50 This designation shall not be construed as recognition of a State of Palestine and is without prejudice to the individual positions of the Member States on this issue.

51 Following Russia's war of aggression against Ukraine, the available funds for Region 4 have been subject to budgetary change. Special measures were put in place to support Ukraine, including reallocation of funds from the Russian envelope. For more information, see **Box 7**.

Latin America (Region 10)	Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Uruguay, Venezuela
Caribbean (Region 11)	Antigua & Barbuda, Bahamas, Barbados, Belize, Cuba, Dominica, Dominican Republic, Grenada, Guyana, Haiti, Jamaica, St Kitts and Nevis, St Lucia, St Vincent & Grenadines, Suriname and Trinidad & Tobago
US and Canada (Region 12)	Canada, United States of America

The proportion of the total budget allocated to each region is aligned with the geopolitical priorities of the European Commission. The largest budgets are typically allocated to the regions neighbouring the EU to its east and south: the Western Balkans (e.g., Albania, Bosnia and Herzegovina), Neighbourhood East (e.g., Ukraine, Moldova) and the South-Mediterranean countries (e.g., Morocco, Jordan). The Sub-Saharan Africa region receives the highest budget allocation in the 2021–2027 programme. For each region there can also be targets or priorities linked to the use of external policy funds, ranging from prioritising certain participants, typically students, to setting maximum or minimum limits on the budget to be spent on specific countries within a region. These targets are intended to be reached at European level over the whole programming period (2021–2027). Since the present report only provides a snapshot of data from the first International Credit Mobility call of the Erasmus+ 2021–2027 Programme, these priorities will not be taken into account in the analysis.

The thirty-four National Agencies⁵² in the Study in Europe region manage the action and each receives a share of the different regional budget envelopes, the size of which is determined, in part, by their country's population size. National Agencies and National Authorities also have the possibility to inject additional national funding for the implementation of the action, either through synergies with structural funds (mainly the European Social Fund+) or in the form of national co-funding. The latter is often, but not exclusively, linked to national priorities and/or internationalisation strategies and dedicated to specific priority regions or countries.

The above aspects provide important context for the ICM data presented in this report; in particular, the ranking of countries of origin of incoming students within the ICM action is to a large extent a reflection of the regional budget allocation. Furthermore, the distribution of incoming ICM students among the host countries in the Study in Europe region is strongly influenced by the amount of budget available to each National Agency. These same principles apply when looking at the sending and receiving countries in outgoing ICM from the Study in Europe region.

About the data: The data on International Credit Mobility under Erasmus+ were provided by the European Commission. This analysis is based on data extracted in February 2026 and only covers call year 2022.⁵³ Mobilities under the 2022 call took place between the academic years 2021/22 and 2024/25 and projects concluded on 31 July 2025. Within the 2022 call, there were 24,314 incoming and outgoing student mobilities planned and 17,654 of these were realised (in other words, took place): an implementation rate of 72.6%. The analysis of ICM presented in **Chapter 5.1** is based on realised mobilities only.

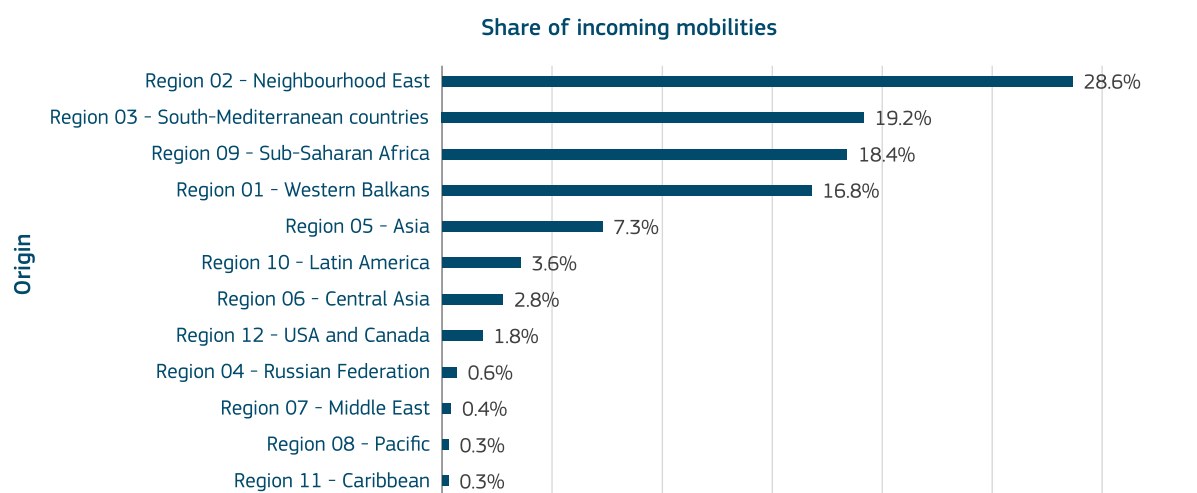
52 Belgium has two National Agencies working on higher education and implementing international credit mobility, one for the French-speaking community (AEF-Europe) and one for the Flemish-speaking community (EPOS). Figures in this report are cumulative.

53 Call year refers to the Erasmus+ annual call for project proposals.

Key facts

- 15,575 incoming student mobilities realised under the 2022 call: 14,089 for studies (90%) and 1,486 for traineeships (10%).
- 63% female; 37% male; <1% undefined.
- 4 months average duration.
- 59% at Bachelor level; 29% at Master level; 11% at Doctoral level

Figure 36. Incoming credit mobilities to Study in Europe region from other regions under the 2022 call.



Source: EU Commission, ICM realised mobilities under the 2022 call.

Note: Applications for ICM projects under the 2022 call were submitted prior to the start of Russia's war of aggression against Ukraine. Following the outbreak of the war, beneficiaries were granted flexibility to reallocate funds to Ukraine and other Neighbourhood East countries. Mobilities involving Russian remained possible under the exemption allowing people-to-people cooperation to continue where this provided a direct benefit to Russian individuals (see **Box 7**).

Countries of origin

As shown in Table 8, among the 117 countries of origin of participating students, Ukraine was the first country of origin by a wide margin, with 2,137 mobilities to the Study in Europe region (14% of the total). Since March 2022, Erasmus+ has implemented special measures to make International Credit Mobility more accessible to Ukrainian participants during Russia's on-going war of aggression against Ukraine. These measures include flexible procedures, increased funding, for example for language training and psychosocial support, and a specific participant flag for those fleeing the war (see **Box 7**).

The second largest country of origin was Georgia (1,351 mobilities; 9%), followed by Albania (1,017; 7%), Bosnia and Herzegovina (703; 5%), and Israel (654; 4%). This ranking reflects the larger regional budget allocation for the EU's eastern and southern neighbours, in line with the priorities of the EU. Although to a lesser extent, Sub-Saharan Africa was also represented in the top 20 countries of origin, with 377 mobilities (2%) from South Africa, 301 (2%) from Ghana and 269 (2%) from Kenya.

Table 8. Countries of origin of incoming ICM to Study in Europe region from other regions (2022 call).

Rank	Country of origin	Mobilities	Share of mobilities
1	Ukraine	2,137	13.7%
2	Georgia	1,351	8.7%
3	Albania	1,017	6.5%
4	Bosnia and Herzegovina	703	4.5%
5	Israel	654	4.2%
6	Kosovo	582	3.7%
7	Morocco	538	3.5%
8	Armenia	437	2.8%
9	Jordan	412	2.7%
10	Tunisia	383	2.5%
11	South Africa	377	2.4%
12	Egypt	309	2.0%
13	Montenegro	309	2.0%
14	Ghana	301	1.9%
15	Azerbaijan	271	1.7%
16	Kenya	269	1.7%
17	Republic of Moldova	259	1.7%
18	Lebanon	242	1.6%
19	Algeria	200	1.3%
20	Kazakhstan	196	1.3%
21	Palestine	188	1.2%
22	United States of America	172	1.1%
23	Senegal	158	1.0%
24	China	153	1.0%
25	Tanzania	139	0.9%
	<i>Other countries (92)</i>	<i>3,818</i>	<i>24.5%</i>
	Total	15,575	

Source: EU Commission, ICM realised mobilities under the 2022 call

Destination countries

Among the Programme Countries, Germany received the largest number of incoming international credit mobilities (2,632; 17%), followed by Spain, France, Italy, and Poland (Table 9). Together, these five destinations hosted more than half (57%) of all ICM under the 2022 call (Figure 37). This is partly explained by the large population sizes of these countries, which increases the share of the total ICM budget allotted to them. The remaining 43% of mobilities were fairly well distributed across the rest of the Study in Europe region, with the majority of Programme Countries in the range of 200 to 500 incoming international credit mobilities.

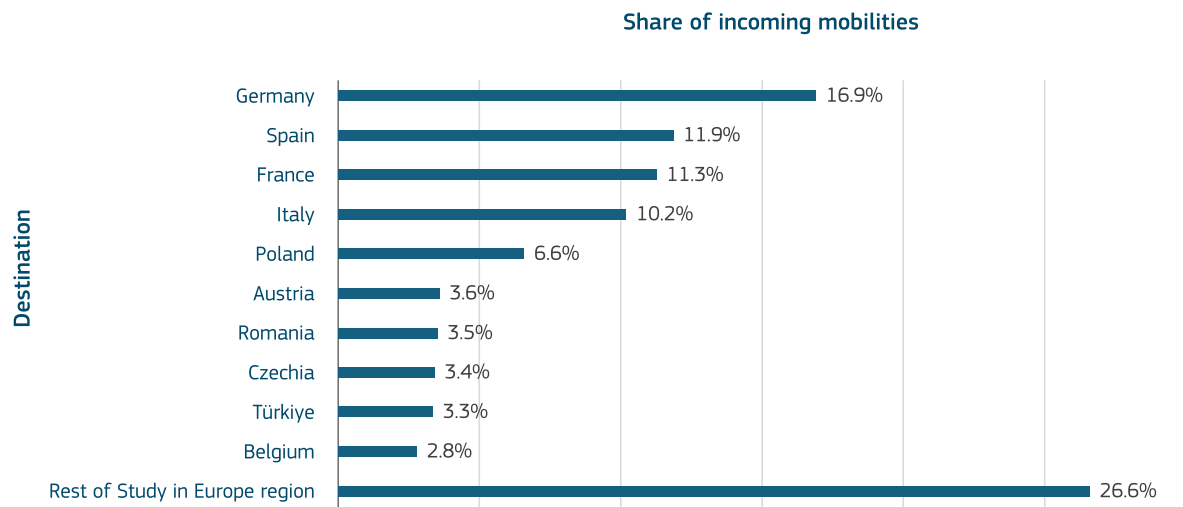
Table 9. Destinations of incoming ICM to the to Study in Europe region from other regions (2022 call).

Rank	Destination country	Mobilities
1	Germany	2,632
2	Spain	1,846
3	France	1,754
4	Italy	1,587
5	Poland	1,025
6	Austria	558
7	Romania	547
8	Czechia	531
9	Türkiye	521
10	Belgium	433
11	Portugal	412
12	Netherlands	394
13	Sweden	367
14	Hungary	340
15	Bulgaria	301
16	Finland	291
17	Lithuania	259
18	Slovakia	248
19	Greece	245
20	Slovenia	213
21	Croatia	211
22	Latvia	211
23	Norway	200
24	Denmark	145
25	Estonia	103
26	Ireland	84
27	Cyprus	41
28	Serbia	30
29	Iceland	20
30	Malta	18
31	Liechtenstein	7
32	North Macedonia	<5
Total		15,575

Note: No application from Luxembourg was submitted in the 2022 ICM call.

Source: EU Commission, ICM realised mobilities under the 2022 call

Figure 37. Main destinations of ICM incoming mobilities under the 2022 call.



Source: EU Commission, KA171 realised mobilities under the 2022 call

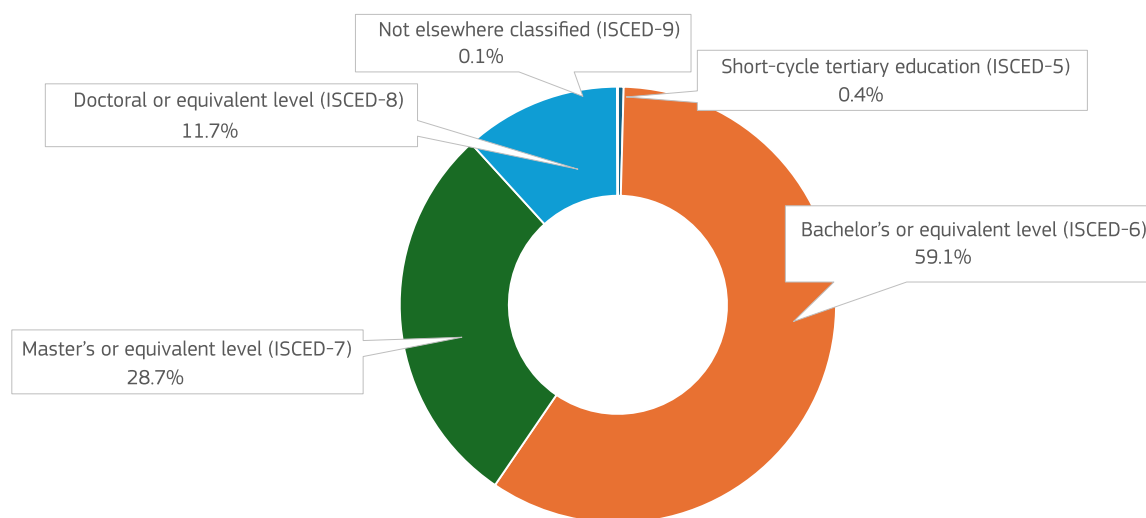
Note: No application from Luxembourg was submitted in the 2022 ICM call.

Levels of study

As shown in Figure 38, the majority of incoming Erasmus+ International Credit Mobility students were enrolled at Bachelor level (ISCED-6), representing 59% of participants. Master level students (ISCED-7) accounted for 29%, while Doctoral level students (ISCED-8) made up 12%. A limited number of participants were reported in short-cycle tertiary education (ISCED-5) or other classifications (ISCED-9): 0.4% and 0.1% respectively.

This distribution reflects the structure and priorities of mobility programmes. Bachelor's students dominate because undergraduate exchanges are often integrated into degree curricula, supported by institutional agreements, and easier to organise within standard academic calendars. Master's mobility is also significant, as many programmes encourage international experience to enhance employability and research skills. Doctoral mobility remains limited due to the highly specialised nature of research, the need for long-term supervision, and funding constraints, which make short-term exchanges less practical at this level.

Figure 38. Level of study of incoming ICM participants in the Study in Europe region from other regions (2022 call).

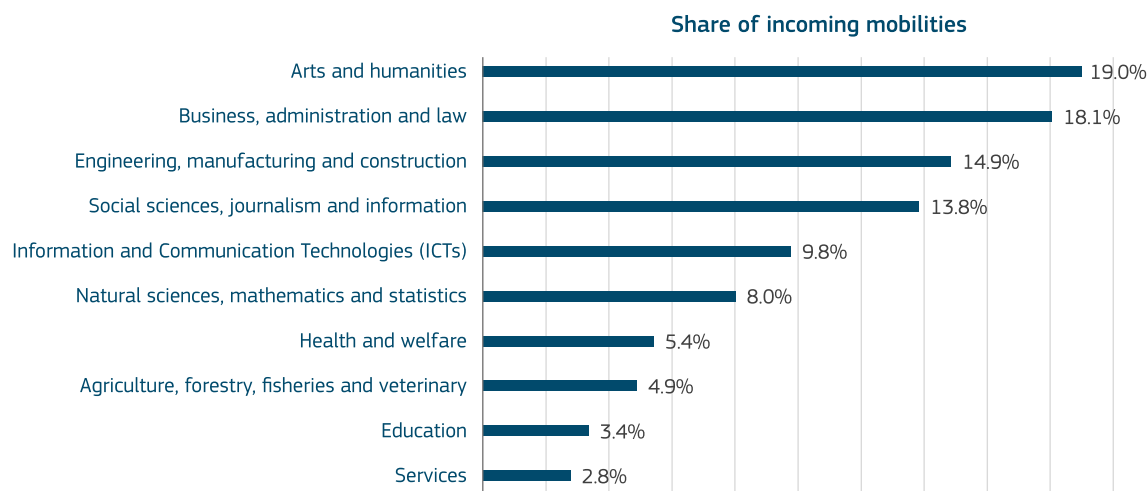


Source: EU Commission, KA171 realised mobilities under the 2022 call. International standard classification of tertiary education levels.

Fields of study

As visible in Figure 39, the distribution of incoming students within the Erasmus+ International Credit Mobility action shows a strong concentration in a few key fields. Arts and humanities and Business, administration and law together accounted for over one-third of all participants, representing 19% and 18% respectively. These were followed by Engineering, manufacturing and construction (15%) and Social sciences, journalism and information (14%), which also attracted significant numbers. Technical and scientific disciplines such as Information and Communication Technologies (ICTs) (10%) and Natural sciences, mathematics and statistics (8%) made up a smaller but notable share. Fields like Health and welfare (6%), Agriculture, forestry, fisheries and veterinary (5%), Education (3%), and Services (3%) represented the smallest proportions, indicating more limited mobility in these areas.

Figure 39. Field of study of incoming ICM participants in the Study in Europe region from other regions (2022 call).



Source: EU Commission, ICM realised mobilities under the 2022 call. ISCED-F 2013 fields.

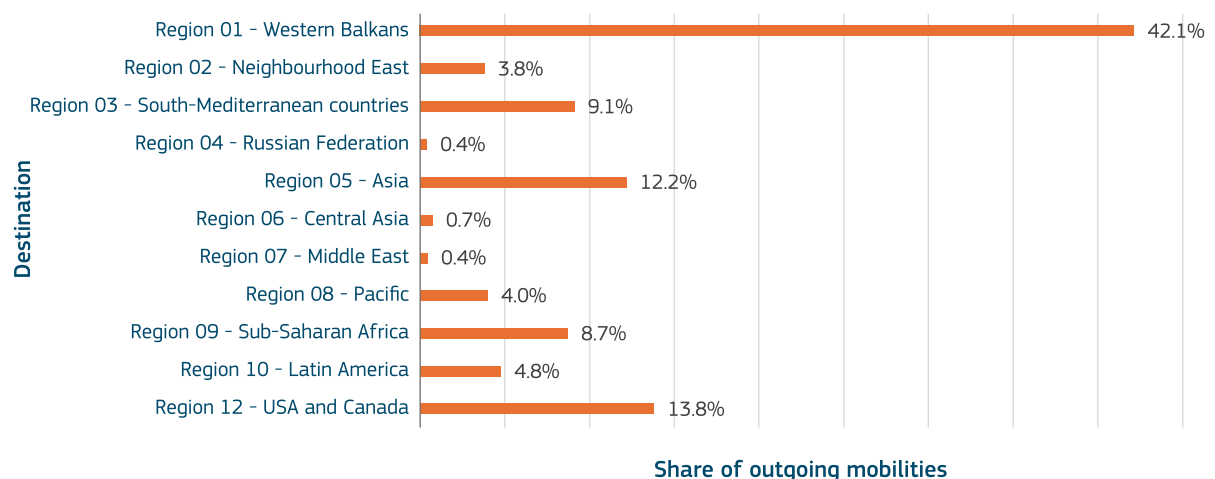
5.2. Outgoing International Credit Mobility from the Study in Europe region under Erasmus+

The results in this chapter concern outgoing International Credit Mobility (ICM), a specific action under the Erasmus+ programme. General information about International Credit Mobility and its regional funding structure is provided in **Chapter 5.1.**

Key facts

- 2,079 outgoing student mobilities under the 2022 call, among which 1,578 (76%) for studies and 501 (26%) for traineeships.
- 52% female; 48% male.
- 43% at Bachelor level; 28% at Master level; 28% at Doctoral level.

Figure 40. Outgoing credit mobilities from the Study in Europe region to the rest of the world under the 2022 call.



Source: EU Commission, ICM realised mobilities under the 2022 call

Note: Applications for ICM projects under the 2022 call were submitted prior to the start of Russia's war of aggression against Ukraine. Following the outbreak of the war, beneficiaries were granted flexibility to reallocate funds to Ukraine and other Neighbourhood East countries. Mobilities involving Russian remained possible under the exemption allowing people-to-people cooperation to continue where this provided a direct benefit to Russian individuals (see **Box 7**).

Countries of origin

With just over 2,000 mobilities under the 2022 call, the participation of students from the Study in Europe region in International Credit Mobility was substantially lower than that of incoming students from Partner Countries (see **Chapter 5.1.**). This remarkable difference can be explained by the restrictions on mobility flows to countries that receive Official Development Assistance (ODA) funding. In International Credit Mobility under Erasmus+, countries on the OECD's ODA recipients list cannot host students at Bachelor (ISCED-6) and Master level (ISCED-7), limiting significantly outgoing student mobility. In 2022, this list included 142 countries out of the 162 possible destinations of International Credit Mobility.

Furthermore, outgoing students originate from a relatively small range of countries, with participation primarily concentrated in six of the 33 Programme Countries (Table 10). Outgoing credit mobility from Germany, France, Italy, Spain, Türkiye, and the Netherlands together accounts for almost two thirds of all outgoing ICM under the 2022 call (65%; Figure 41).

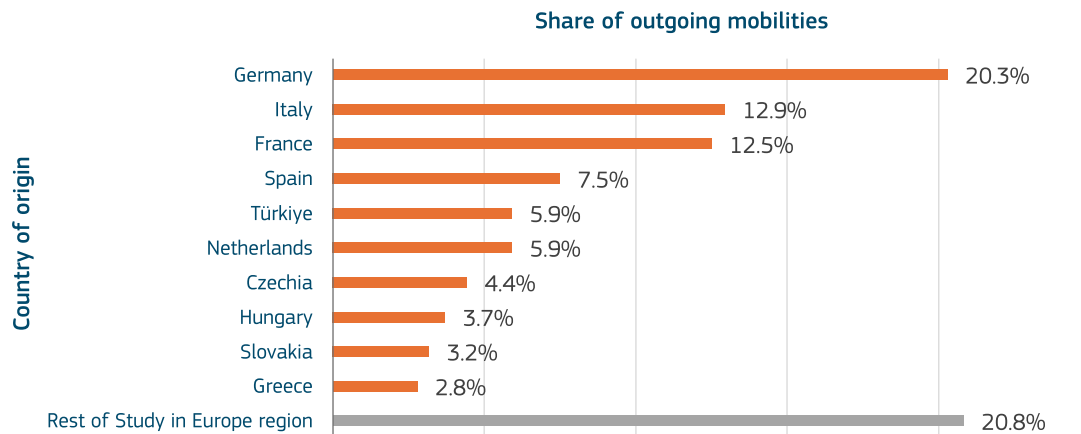
Table 10. Countries of origin of outgoing ICM from the Study in Europe region to the rest of the world (2022 call).

Rank	Country of origin	Mobilities	Share of total mobilities
1	Germany	422	20.3%
2	Italy	269	12.9%
3	France	260	12.5%
4	Spain	156	7.5%
5	Türkiye	123	5.9%
6	Netherlands	123	5.9%
7	Czechia	92	4.4%
8	Hungary	77	3.7%
9	Slovakia	66	3.2%
10	Greece	58	2.8%
11	Austria	58	2.8%
12	Portugal	44	2.1%
13	Poland	42	2.0%
14	Belgium	42	2.0%
15	Romania	40	1.9%
16	Slovenia	29	1.4%
17	Sweden	27	1.3%
18	Finland	23	1.1%
19	Bulgaria	22	1.1%
20	Ireland	21	1.0%
21	Serbia	21	1.0%
22	Lithuania	15	0.7%
23	Denmark	9	0.4%
24	Iceland	9	0.4%
25	Estonia	8	0.4%
26	Latvia	7	0.3%
27	Croatia	5	0.2%
28	Norway	5	0.2%
29	Cyprus	<5	0.1%
30	Liechtenstein	<5	0.1%
31	North Macedonia	<5	0.1%
Total		2,079	

Source: EU Commission, ICM realised mobilities under the 2022 call.

Note: Data unavailable for Luxembourg and Malta. Luxembourg did not submit an ICM proposal in call 2022.

Figure 41. Share of outgoing credit mobilities from the top 10 origin countries in the Study in Europe region.



Source: EU Commission, ICM realised mobilities under the 2022 call

Destination countries

Together, Western Balkan partners Albania (408) and Bosnia and Herzegovina (236) hosted almost one third of all outgoing ICM from the Study in Europe region under the 2022 (Table 9). The strong representation of the Western Balkans in the top 10 destinations reflects the larger budget envelope allocated to this neighbouring region, in line with EU priorities, but also the fact that the ODA-related restrictions mentioned in the previous section do not apply to the Western Balkans. At the same time, Table 11 shows that internationally credit-mobile students from the Study in Europe region reach a striking variety of global destinations, including the USA, Japan, Australia, South Korea, Chile, and Uganda. This highlights the impressive geographical coverage of International Credit Mobility under Erasmus+, and the diversity of international experiences it offers to EU students.

Notably, English-speaking destinations attract a relatively large number of credit-mobile students from the EU. Studying in an English-speaking environment enables students to strengthen language skills that are highly valued in the labour market.

Table 11. Destinations of outgoing ICM from the Study in Europe region (2022 call).

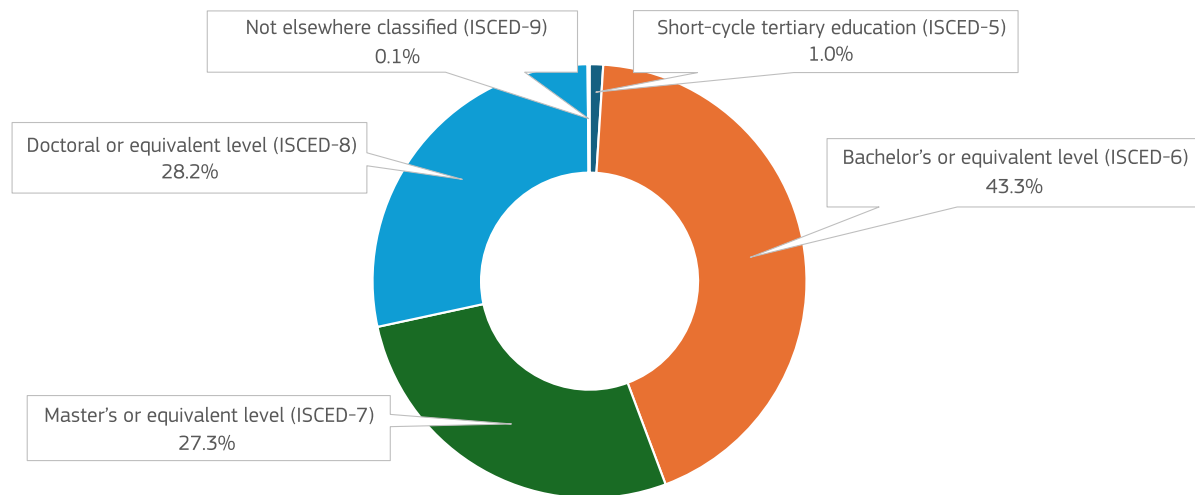
Rank	Destination country	Mobilities	Share
1	Albania	408	19.6%
2	Bosnia and Herzegovina	236	11.4%
3	United States of America	191	9.3%
4	Israel	123	5.9%
5	Kosovo	116	5.6%
6	Montenegro	116	5.6%
7	Japan	114	5.5%
8	Canada	96	4.6%
9	Australia	70	3.4%
10	South Korea	50	2.4%
11	Georgia	49	2.4%
12	Chile	44	2.1%
13	South Africa	38	1.8%
14	Taiwan	25	1.2%
15	Kenya	19	0.9%
16	Jordan	18	0.9%
17	Uganda	17	0.8%
18	Ethiopia	16	0.8%
19	Algeria	14	0.7%
20	New Zealand	13	0.6%
21	Tanzania	13	0.6%
22	Moldova	12	0.6%
23	Egypt	11	0.5%
24	Armenia	10	0.5%
25	Zimbabwe	10	0.5%
	<i>Other countries (60)</i>	<i>250</i>	<i>12.0%</i>
Total		2,079	

Source: EU Commission, KA171 realised mobilities under the 2022 call.

Levels of study

As seen for incoming mobility, Figure 42 shows that outgoing ICM students were most commonly enrolled at Bachelor level (ISCED-6; 43%). However, relative to incoming ICM, outgoing ICM had a considerably larger percentage of students enrolled at Doctoral level (ISCED-8; 28%), forming the second largest group, followed Master's students (27%). As for the outgoing mobility destinations and total number of outgoing mobilities, this differing distribution among the study levels can be explained by the ODA-related restrictions that limit the possibilities in terms of ICM destinations for outgoing students at Bachelor and Master level.

Figure 42. Level of study of outgoing ICM participants from the Study in Europe region to other regions (2022 call).

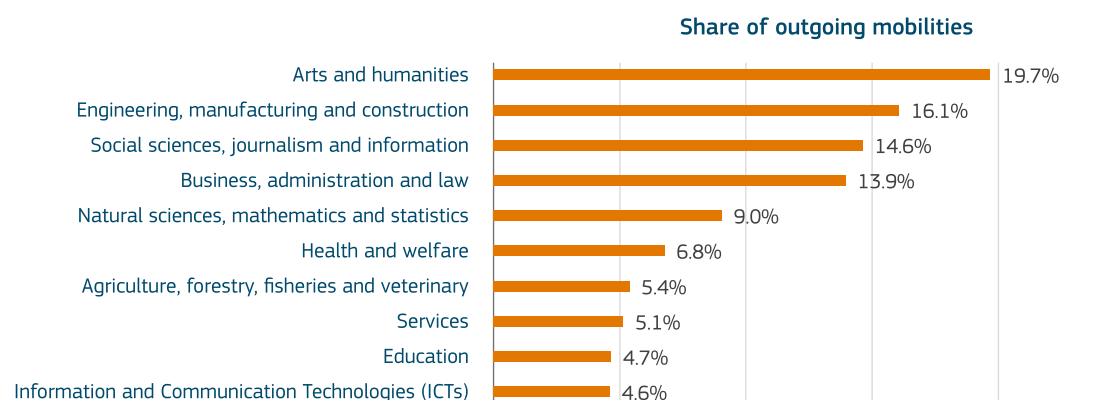


Source: EU Commission, KA171 realised mobilities under the 2022 call. International standard classification of tertiary education levels.

Fields of study

As seen in Figure 43, one in five outgoing Erasmus+ International Credit Mobility participants from the Study in Europe region studied Arts and humanities (409 mobilities; 20% of the total). Close behind were Engineering, manufacturing and construction (334; 16%), Social sciences, journalism and information (304; 15%), and Business, administration and law (290; 14%). In the field of Natural sciences, mathematics and statistics 188 mobilities took place (9%), while Health and welfare saw 141 (7%). The fields Agriculture (112; 5%), Services (107; 5%), Education (97; 5%), and Information and Communication Technologies (96; 5%) recorded the lowest shares.

Figure 43. Field of study of outgoing ICM participants from the Study in Europe region to the rest of the world (2022 call).



Source: EU Commission, ICM realised mobilities under the 2022 call. ISCED-F 2013 fields.

Box 7. Special arrangements for Ukraine

In response to Russia's on-going war of aggression against Ukraine, special measures have been in place since 2022 to make International Credit Mobility more accessible to Ukrainian participants. These measures include flexible procedures to help students integrate in the European education system and increased funding, for example for language training and psychosocial support. Furthermore, participants fleeing the conflict in Ukraine are flagged in the Erasmus+ system and automatically qualify as participants with fewer opportunities. Among all participants with fewer opportunities under the 2022 call, 35% (1,422) are from Ukraine, highlighting the programme's significant impact in regions affected by conflict.

The Erasmus+ action for intra-European mobility also started offering incoming mobility from Ukraine to the Study in Europe region, benefitting around 4,000 Ukrainian students who could participate in mobility to study (91%) or do a traineeship (9%) under the 2021 and 2022 calls. Over half of these mobilities took place in Germany and Poland, followed by Ireland, Spain, and Lithuania.

Box 8. Erasmus+ priorities: green travel, inclusion, digitalisation*Green travel*

One of the priorities of the Erasmus+ Programme is environmental sustainability, which translates to encouraging the use of sustainable means of transport. Due to the long distances covered in mobility to and from third countries not associated to the Erasmus+ Programme, and the difficulty of using sustainable means to travel in most cases, International Credit Mobility can only marginally contribute to this priority and the number of "green travel" mobilities, as they are commonly called in Erasmus+ mobility projects, is minimal. However, one exception is represented by Region 2 Neighbourhood East, in which 21% of all incoming mobilities to the Study in Europe region used sustainable means to travel. Most certainly, this is purely a consequence of Russia's war of aggression and the impossibility of flying into and out of Ukraine.

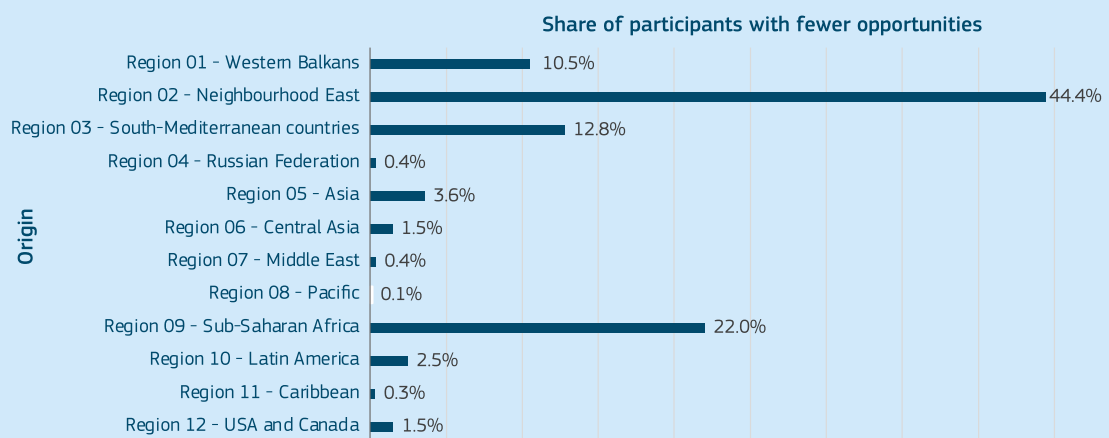
Participants with fewer opportunities

The EU is committed to equal access, diversity, and social inclusion in education and mobility, ensuring that opportunities are fair, accessible, and supportive for all learners, regardless of their socioeconomic background or personal circumstances. The current iteration of the Erasmus+ programme has introduced several financial and non-financial measures aimed at enhancing inclusion and broadening access to mobility opportunities.

Notably, International Credit Mobility under Erasmus+ now includes specific provisions to support participants with fewer opportunities, who, "for economic, social, cultural, geographical or health reasons, a migrant background, or for reasons such as disability and educational difficulties or for any other reasons, including those that can give rise to discrimination under article 21 of the Charter of Fundamental rights of the European Union, face obstacles that prevent them from having effective access to opportunities under the programme" (European Commission). The Erasmus+ Programme Guide specifies that for higher education mobility this means including "participants with physical, mental and health related conditions, students with children, students who work or are professional athletes and students from all study fields underrepresented in mobility" (European Commission). In international credit mobility, support to participants with fewer opportunities takes the form of additional financial support, on top of the basic grant.

Under the 2022 call, 4,715 international credit mobilities (27% of all student mobilities, both incoming and outgoing) benefitted individuals with fewer opportunities. Largely due to the special arrangements for Ukraine, described in more detail in **Box 7**, almost half of incoming participants with fewer opportunities under the 2022 call came from the Neighbourhood East region. Sub-Saharan Africa is a distant second, with 22%, followed by the South Mediterranean countries with 13% and the Western Balkans with 11% (see Figure 44). Looking at outgoing ICM, 20% of mobilities benefitted participants with fewer opportunities.

Figure 44. Regional distribution of participants with fewer opportunities in incoming International Credit Mobility under 2022 call.



Blended mobility and Online Linguistic Support

Another significant development under the 2021-2027 Erasmus+ programme is the introduction of blended mobilities, which combine physical and virtual components, creating an integrated learning experience that involves both online and face-to-face interaction. The virtual element can occur before, during, or after the physical stay and includes activities such as preparation, collaborative projects, and reflection. This hybrid approach increases the flexibility and reach of the programme, catering to a wider range of learning preferences and needs. For example, the shorter stay abroad makes blended mobility more accessible to participants with personal or care-giving commitments, as well as reducing overall costs. Out of all international credit mobilities under the 2022 call (incoming and outgoing), 9% were blended (1,636).

Furthermore, the 2021-2027 Erasmus+ programme has for the first time provided Online Linguistic Support (OLS) licences to 4,289 ICM participants (24%), enabling them to access language learning resources and better prepare for their mobility. This novel support mechanism has benefited participants from 148 countries, with substantial contingents from Ukraine, Georgia, Albania, and Bosnia and Herzegovina. These enhancements underscore the programme's commitment to creating a more accessible and equitable environment for international educational exchanges through the ICM action.

5.3. National snapshots of total incoming credit mobility

Not all incoming credit mobility to the Study in Europe region takes place under the Erasmus+ programme (see **Box 6**). Students from around the world can also participate in short-term academic exchanges that are funded by other national or international programmes, or by other arrangements. To provide an additional insight into incoming credit mobility flows to the Study in Europe region, independent of funding source, we present snapshots from four host countries for which suitable national data were available: Germany, Finland, France, and Spain.⁵⁴ The data presented are not always equivalent due to the differing methodologies and scope of country-level reports. What these data have in common is that they group together all incoming credit-mobile students in the countries concerned. The data thus provide a broader view than the Erasmus+ data presented above, since they also include credit mobility through other (non-Erasmus+) national and international programmes, and through other arrangements (e.g., self-funded mobility).

Finally, the snapshots presented below concern incoming credit mobility at all levels of tertiary education. The national datasets obtained unfortunately do not allow for disaggregation by level of study. In addition, no information is available regarding the type of activity pursued (i.e., academic study or internship/traineeship), or the use of blended forms of mobility.

Germany

In 2022, there were about 3,309,000 tertiary education students in Germany. As Figure 45 shows, the number of incoming students (including those from within the Study in Europe region) reached about 368,000 during the 2022/23 winter semester, representing 11% of the total student population.⁵⁵ In 2022/23, more than nine out of 10 incoming students in Germany were on degree mobility programmes (93%), while the remaining 7% participated in credit mobility.⁵⁶ Although the total number of mobile students in Germany increased by 74% between 2013/14 and 2022/23, the number of incoming credit-mobile students decreased by 8% over the same period. Most of the credit-mobile students in Germany in 2022/23 studied at research universities (78%), and the majority were in their first semester (80%; DAAD, 2024). International credit mobility students were particularly likely to study Law, Economics and Social Sciences (37%).

⁵⁴ The national snapshots are based on reports and open data made available online by the respective countries.

⁵⁵ Incoming students are defined as those who obtained their secondary school diploma outside of Germany and came to Germany in order to study.

⁵⁶ Does not include students who enrol in the summer semester and stay at the university for one semester only, which is the case for many visiting and exchange students.

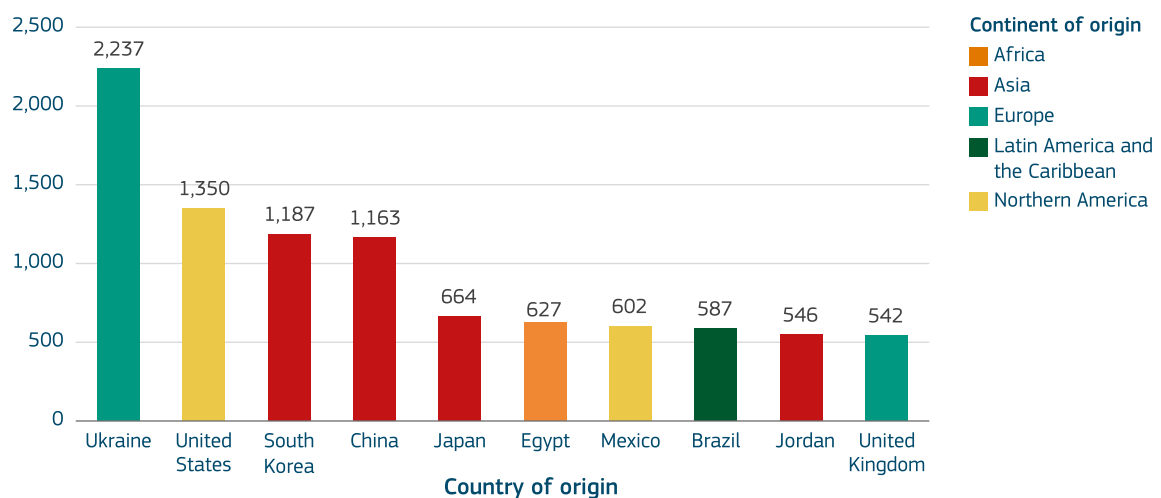
Figure 45. Number of incoming students in Germany by type of mobility in 2022/23 (including students from other Study in Europe countries).



Source: Wissenschaft Weltoffen, Facts and Figures on the International Nature of Studies and Research in Germany and Worldwide, 2024.

The available data on the origins of credit mobile students in Germany has 75% coverage, meaning that the nationality of 25% of the students is unknown. These data show that 56% of credit-mobile students come from outside the Study in Europe region and 44% from within the region. Ukraine (9% of the total), the USA (5%), South Korea (5%), and China (5%) are the top countries of origin outside of the Study in Europe region (Figure 46).

Figure 46. Number of credit-mobile students in Germany from outside of the Study in Europe region by country of origin in 2022/23.

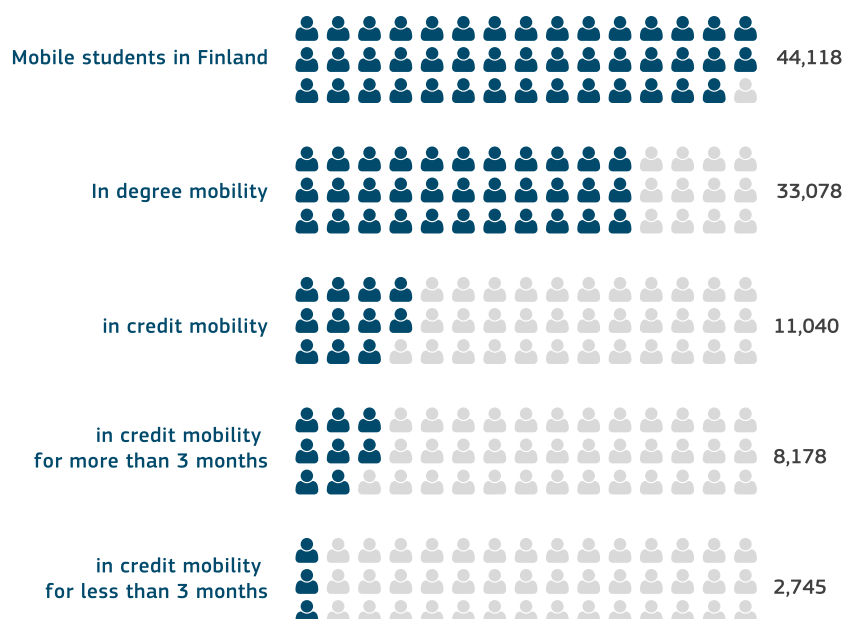


Source: Wissenschaft Weltoffen, Facts and Figures on the International Nature of Studies and Research in Germany and Worldwide, 2024.

Finland

In 2023, Finland had about 336,000 tertiary education students. Among them, about 44,000 were foreign nationals (Figure 47), accounting for 13% of the total student population. One in four international students (25%) participated in a credit mobility programme, while three out of four were enrolled in a degree mobility programme.

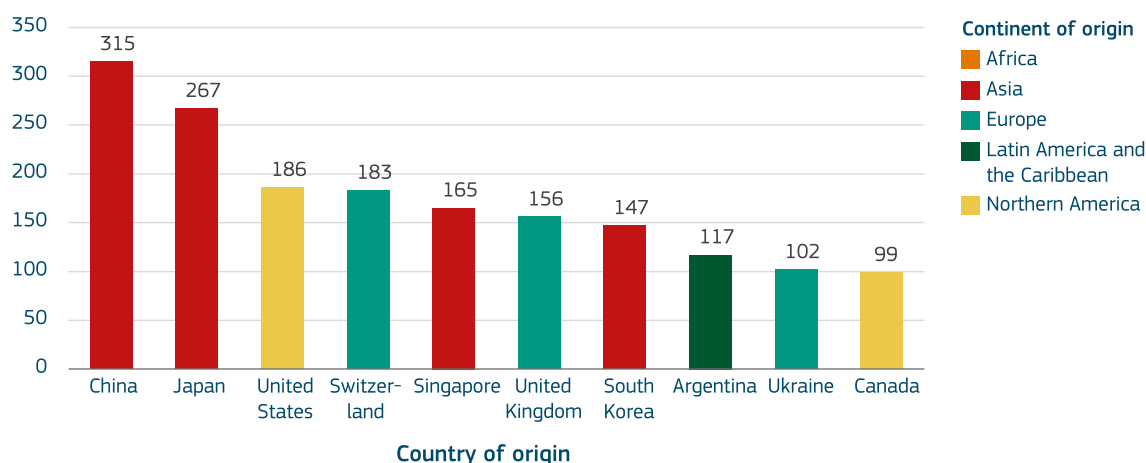
Figure 47. Number of mobile students in Finland by type of mobility in 2023 (including students from other Study in Europe countries).



Source: Vipunen Education Statistics Finland

More than three-quarters of the incoming credit-mobile students in Finland came from within the Study in Europe region in 2023 (78%). As shown in Figure 48, China is the leading country of origin for credit-mobile students from outside the Study in Europe region, accounting for 13% of all incoming credit mobility, followed by Japan (11%) and the USA (8%). Among credit-mobile students from outside the Study in Europe region, 75% come for more than three months and the rest for less than three months. Notably, the USA sends a relatively large share of students to Finland on short-term credit mobility programmes lasting less than three months (58%).

Figure 48. Number of credit-mobile students in Finland from outside the Study in Europe region by country of origin in 2023.

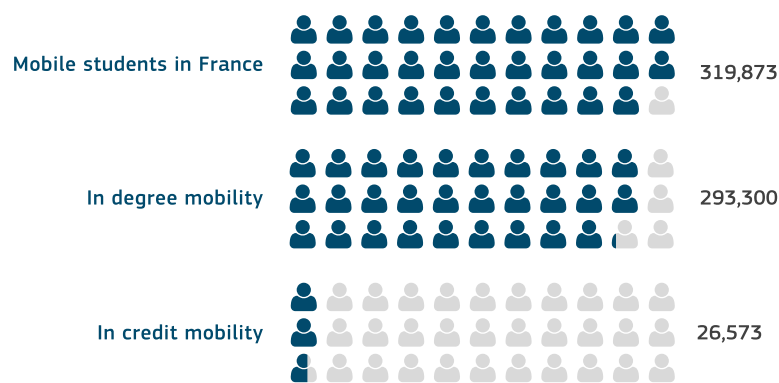


Source: Vipunen Education Statistics Finland

France

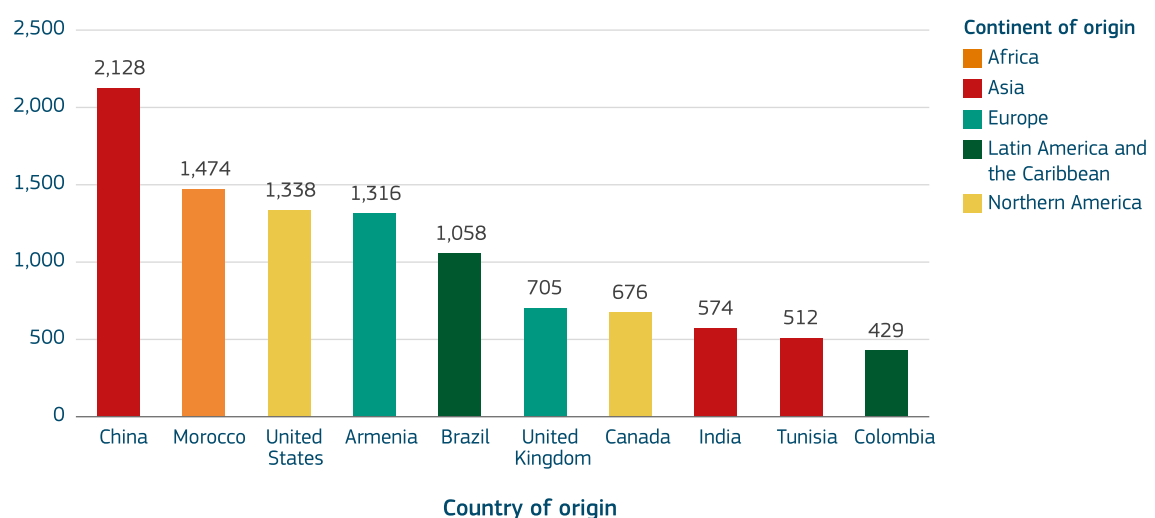
In the academic year 2023/24, France had more than 2,965,000 students in tertiary education. During the academic year 2023/24, almost 320,000 mobile students were enrolled in French tertiary education, equivalent to 11% of the total student population (Figure 49). Among these mobile students, about 293,000 (92%) were enrolled in degree mobility programmes, while almost 27,000 (8%) participated in credit mobility schemes. The majority were studying at universities (about 18,000; 68%), while about 8,000 were enrolled at other types of institutions. In France, national data on incoming credit mobility has only been collected since 2022/23. The number of credit-mobile students increased by 2% in one year.

Figure 49. Number of mobile students in France by type of mobility in 2023/24 (including students from other Study in Europe countries).



The majority of credit mobile students in France came from countries outside the Study in Europe region (61%), while 39% originated from within the region. China was the leading country of origin outside the Study in Europe region, contributing 8% of all incoming credit mobility, and ranked third overall. Morocco followed with 6%, ahead of the USA and Armenia, each accounting for 5% (Figure 50).

Figure 50. Number of credit-mobile students in France from outside the Study in Europe region by country of origin in 2023/24.



Spain

In 2022, Spain had about 2,309,000 students in tertiary education. Among them, almost 242,000 were foreign nationals (Figure 51), equivalent to 10% of the total student population. Three-quarters of these foreign students (almost 181,000; 75%) were enrolled in degree mobility programmes, while the remaining 61,000 (25%) participated in credit mobility schemes. The majority of credit-mobile students studied at public institutions (82%), while 18% were enrolled at private institutions. Between 2018/19 and 2022/23, the number of credit mobile students increased by 8%, while the total number of foreign students hosted increased by 24%.

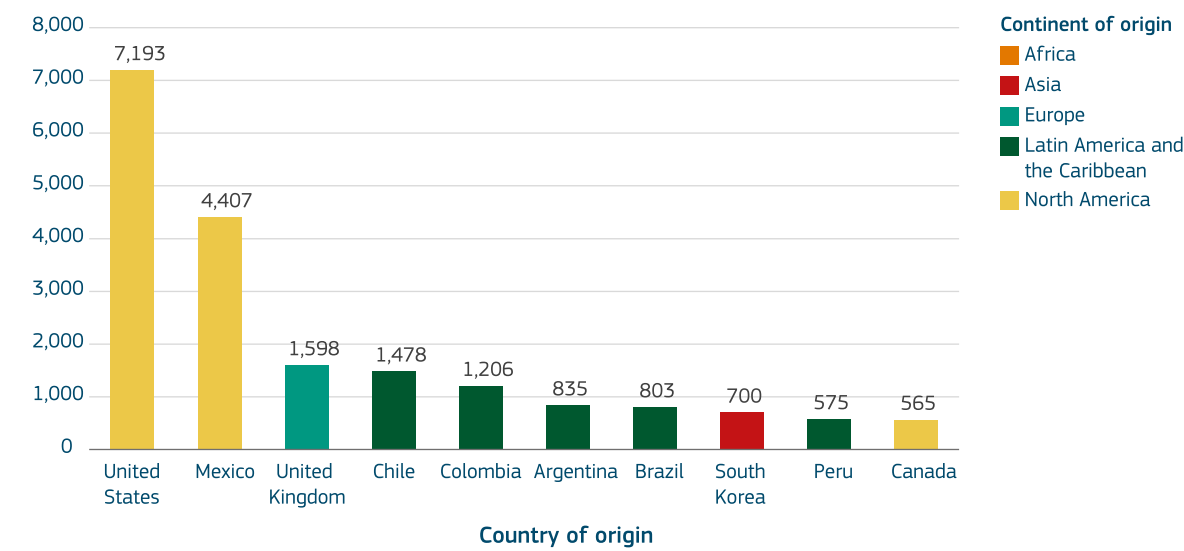
Figure 51. Number of foreign students in Spain by type of mobility in 2022/23 (including mobility from other Study in Europe countries).



Source : Ministry of Science, Innovation and Universities

In 2022/23, the majority of credit mobile students in Spain came from countries within the Study in Europe region (61%), while 39% originated from outside the region. Among those from outside the Study in Europe region, three-quarters came from the Americas and the Caribbean (75%). The USA, contributing 12% of the total, and Mexico (7%) were the main countries of origin for credit mobile students outside the Study in Europe region (Figure 52), followed by the United Kingdom (3%) and Chile (2%).

Figure 52. Number of credit mobile students in Spain from outside of the Study in Europe region by country of origin in 2022/23.



Source: Ministry of Science, Innovation and Universities

6. Conclusion

6.1. Summary of main findings

Global mobility trends

In 2022, 256 million students were enrolled in tertiary education worldwide. Of these, **6.9 million** were on a degree-granting mobility scheme – around **3% of all students globally**. The total number of mobile students worldwide grew by **61% between 2013 and 2022**. After a temporary decline in 2021 due to the COVID-19 pandemic, the number of mobile students in 2022 exceeded pre-pandemic levels.

Asia is the leading continent of origin, with China and India the two largest source countries globally. As a continent, **Europe continues to attract the largest number of international students worldwide** – more than the USA and the UK individually – while Asia, currently the second-largest destination continent, has recorded the fastest growth over ten years (**Chapter 3**).

The Study in Europe region

With almost **1.24 million incoming degree students** and around **300,000 outgoing students** in 2022, it is notable that the Study in Europe region receives far more mobile students from the rest of the world than the number it sends out: a ratio of approximately four to one.

Looking at the longer-term trends, **incoming degree mobility** to the Study in Europe region **more than doubled** in the ten years to 2022, while **outgoing mobility increased** by a modest **9%** over the same period. Unlike most other major destinations, the region showed **resilience during COVID-19**, with incoming student numbers increasing steadily between 2020 and 2022 (**Chapter 4.1**).

Incoming degree mobility: Asia and Africa drive growth

In 2022, **half of all incoming degree students** to the Study in Europe region originated from **Asia**, and **one quarter from Africa**. Together, these two continents, particularly Asia, have driven the substantial growth in total incoming student numbers since 2013, both roughly doubling their numbers over this period (**Chapter 4.1**).

The three leading countries of origin of international degree students in the Study in Europe region are **China, Syria, and India**.

- **China** leads by a considerable margin with almost **100,000 degree students** in the Study in Europe region in 2022, although this represents **less than 10%** of all mobile Chinese students worldwide. **Growth** over the past decade (**around one third**) has been more moderate compared to other major countries of origin such as Syria and India. **Germany** is the main destination for Chinese students within the region, and the majority pursue a Master's degree there (59% in 2022).
- The number of degree students from **Syria** in the Study in Europe region has **increased by a factor of fifteen since 2013**. This is the highest growth recorded for any country of origin, leading Syria to enter the top three alongside China and India in 2020. In 2022, the Study in Europe region hosted **approximately eight out of ten Syrian degree students** worldwide, the majority in neighbouring **Türkiye**. These trends can be understood in the broader context of the Syrian civil war (2011–2024), which forced millions of Syrians to flee to neighbouring countries and then on to Europe. The most recent data from 2021 and 2022 suggest that the growth in student numbers from Syria is beginning to flatten out.

- **India** recorded the largest absolute increase in degree student numbers after Syria, sending **nearly five times as many students** to the Study in Europe region as it did ten years earlier. In 2022, the Study in Europe region hosted **12% of all mobile Indian degree students worldwide**, with Germany the leading destination country, particularly at Master's level. India's strong emphasis on STEM (Science, Technology, Engineering, and Mathematics) education, as well as the relatively high post-graduation retention rates of its mobile students, make it a strategic target for international student recruitment (OECD, 2022).

The number of degree-mobile students from **Ukraine** increased rapidly until 2017, making Ukraine the second-most common country of origin for international students in the Study in Europe region between 2015 and 2018. After a brief period of decline, incoming degree mobility from Ukraine grew again after 2019, making it the fourth most common country of origin in 2022. In 2022, most Ukrainian students in the Study in Europe region were enrolled at undergraduate level (71%). Poland (54%), Germany (10%), and Slovakia (9%) were the main destination countries for Ukrainian degree students in 2022.

The current UNESCO-OECD-Eurostat data **do not yet** reflect the effect of Russia's war of aggression against Ukraine, as the reference date for the 2022 data precedes 24th February 2022. However, the rapid growth in study migration from Ukraine indicates that Russia's annexation of Crimea in 2014 and the ensuing conflict in the region was already influencing mobility trends in the Study in Europe region prior to the full-scale invasion.

Destinations of international degree students in the Study in Europe region

The three countries hosting the largest numbers of international degree students from outside the region are **Germany**, with **21%** of the total in 2022, **Türkiye** with **19%**, and **France** with **18%**. After Germany and France, **Poland** is the third largest host country in the European Union. Of all the Study in Europe countries, Türkiye recorded the most rapid growth in its international degree student population over the ten years to 2022, largely driven by refugees and students fleeing conflict and crises in the wider region.

Of the major EU host countries, **Poland experienced the fastest relative growth (+266%)**, partly an effect of the large increase in incoming students from Ukraine. The top-10 fastest growing EU destinations also include Slovakia, Estonia, Slovenia, Latvia, and Hungary, as policies focused on internationalisation, talent attraction, and graduate employability have gained traction across parts of Central Europe and the Baltic statescccc. (**Chapter 4.1**).

Outgoing degree mobility

Around two thirds of outgoing degree students from the Study in Europe region **remain within the region**. This pathway is facilitated not only by free movement within the Schengen Area, but also by the mutual recognition of diplomas and similarly structured degree programmes within the European Higher Education Area.

Students who choose to study outside of the Study in Europe region most often go to the **UK (44%)**, the **USA (19%)**, and **Switzerland (15%)**. Unlike other top destination countries, the UK has seen the number of degree-mobile students from the Study in Europe region decline in the last few years, likely due to Brexit.

In absolute terms, France, Germany, and Italy have the largest number of students pursuing a degree outside the Study in Europe region. Relative to their total student population, however, smaller countries, such as Liechtenstein, Luxembourg, and Cyprus record the highest percentages of their students pursuing a degree outside of the Study in Europe region.

In 2022, **60% of outbound students** from the Study in Europe region were enrolled in **Bachelor's programmes**, while around **one quarter** pursued **Master's degrees**. These proportions remained relatively stable between 2013 and 2022 (**Chapter 4.2**).

International credit mobility under Erasmus+

The EU-funded International Credit Mobility (ICM) action has shown **strong participation of third countries outside the Study in Europe region**, with incoming students accounting for **90% of student mobilities** under the **2022 call**. Most incoming participants studied at Bachelor level (59%) and preferred study periods (90%) over traineeships. Credit-mobile students from **117 third countries** came to the Study in Europe region, 14% from Ukraine, which is supported by special arrangements since 2022 (**Box 7**). **Germany, Spain, France, Italy, and Poland** collectively hosted **over half of all incoming ICM students**. One third of incoming credit mobilities to the Study in Europe region were in Engineering, ICT, and Natural Sciences, reflecting the strong international reputation of European tertiary education in STEM fields (**Chapter 5.1**).

Erasmus+ places a strong emphasis on inclusion and diversity. Targeted support for participants with fewer opportunities, addressing barriers such as economic hardship, disability, and discrimination have been put in place. Under the 2022 ICM call, over 4,000 mobilities (27% of the total) benefited individuals facing such challenges (**Box 8**).

Incoming credit mobility: complementary but smaller in scope

Credit mobility remains significantly smaller than degree mobility, accounting for **7–25% of total incoming mobility** in countries with comprehensive data (7% in Germany, 8% in France, and 25% in Spain and Finland). In these countries, the share of credit-mobile students from outside the Study in Europe region varies considerably, ranging from 22% in Finland to 39% in Spain, 56% in Germany, and 61% in France (**Chapter 5.3**).

Leading global study destinations: market shares and mobility trends

Since 2019, the Study in Europe region has dominated the global higher education market, hosting **around one quarter of all degree-mobile students from outside the region**. Four of its five largest competitors in terms of market share are **anglophone OECD countries**: the **USA** (market leader up to 2019), the **UK**, **Australia**, and **Canada**. **Russia** is the only non-English speaking country among the major competitors.

While the absolute number of mobile students worldwide increased rapidly in the ten years to 2022, the **global market shares held by the Study in Europe region and its main competitors have remained relatively stable** over time. The **USA** is the **exception**, having seen its **market share decline from 27% in 2013 to 17% in 2022**. A **complex interplay of factors** influenced the development of incoming mobility flows to the major study destinations between 2013 and 2022. To some degree, the observed mobility trends reflect national policies on study migration and post-study employment, which can variously act as a barrier, facilitator, or pull factor for prospective international students. Concurrently, mobility flows are influenced by **geopolitical developments** such as **Brexit**, which, for example, led to growth in the number of non-EU student enrolments in the UK, following more tailored recruitment strategies of UK universities.

Finally, the global disruption caused by the **COVID-19 pandemic** from early 2020 is partially visible in the incoming mobility data, although its **effects are not uniform across countries**. This reflects the wide variety of measures taken by national governments, from the very strict to the more flexible, as well as their varying timespans. The **Study in Europe region** was the only leading destination other than the UK to **record year-on-year growth in international student numbers between 2020 and 2022**. This highlights both the effective response of European higher education institutions to the crisis and the generally flexible and responsive approach of Erasmus+ countries. While the other major destinations experienced a contraction due to COVID-19, most show early signs of recovery in 2022, suggesting that any effect of the pandemic on incoming degree mobility was temporary (**Chapter 4.1**).

6.2. A look ahead

Looking beyond 2022, **the landscape of international student mobility continues to evolve, shaped by heightened policy intervention and strategic realignment.** The major English-speaking destination countries are facing **increased scrutiny** over international student enrolment due to mounting pressures on migration policies, housing, public infrastructure, and concerns over visa system integrity. As a result, the approach to international student mobility is becoming more selective and restrictive.

In **Australia**, legislative and regulatory changes introduced in 2024 tightened the international student framework. These measures included increases in visa application costs, higher English-language requirements for prospective international students, and the introduction of a cap of 270,000 new international enrolments for 2025 (Turnbull, 2024). **Canada** similarly introduced a cap on the number of study permits issued from 2024 onwards in order to bring net year-on-year growth in international enrolments down to zero (ICEF Monitor, 2024). The **UK**, meanwhile, introduced measures in 2024 to limit the number of family members accompanying international students with the exception of PhD students (McKinney & Gower, 2024). The UK government is also considering the introduction of a new tax on international tuition fees that could reach 6%, which would further alter the cost structure for incoming students (Mitchell, 2025).

There is evidence that **these policy changes are already affecting incoming degree mobility:** Australia recorded a 38% decrease in the number of study permits issued in the year to August 2024 (Nash, 2024), while student visa applications in the UK fell by 16% after the new rules on dependants came into effect.⁵⁷ Canada has seen international enrolments contract even faster, with 48% fewer study permits issued in the first year of the cap, far exceeding the target reduction of 35% (Nash, 2025). Together, these developments suggest that international student access in major destination countries is being affected by long-term policy changes. The 2027 edition of this report, including 2023 and 2024 data, will allow a clearer assessment of their impact.

In the **USA**, the proposed measures to control incoming student mobility extend even further. In 2025, a range of policies were announced with potentially far-reaching implications for both current and prospective international students. These include proposals to revoke study visas of students of certain nationalities, enhance social media vetting of student visa applicants, and restrict specific higher education institutions from enrolling new international students. Many of these policies are legally contested and so it remains uncertain what impact they will ultimately have. One new policy already introduced (as of June 2025), is the visa ban affecting foreign nationals, including international students, from nineteen countries (NAFSA, 2025b). Among the affected countries, Iran has the largest number of degree-mobile students in the USA (around 8,000 in 2022). In addition, prospective international students from several other countries, including India and China, have reported difficulties in securing visa appointments at US consulates (NAFSA, 2025a). Taken together these disruptions are expected to result in a 30–40% decline in new international enrolments in the academic year 2025/26, potentially causing the total international student population in the USA to shrink by 15% (NAFSA, 2025a).⁵⁸ As the world's leading destination country for international students, such a profound shift in political discourse and policy in the USA is bound to have ripple effects.

Shrinking incoming student mobility to the USA, combined with increasingly restrictive policies in other major English-speaking destinations, is creating space for alternative and emerging study destinations to gain ground in the coming years. Recent analyses suggest a gradual transition from a highly concentrated 'big four' model, dominated by the USA, UK, Australia, and Canada, towards a more diversified set of destination countries in Asia and Europe, sometimes referred to as the 'big fourteen'⁵⁹ (ICEF Monitor, 2025a). At the same time, the current political climate in the USA may generate a short-term increase in outbound mobility from the USA, potentially benefitting European destinations in particular, given the historical and cultural ties.

57 For more information see: <https://www.gov.uk/government/statistics/immigration-system-statistics-year-ending-december-2024/why-do-people-come-to-the-uk-study>

58 The most recent data for the USA show a 7% drop in new international enrolments in 2024/25 (IIE, 2025).

59 While there is no definitive list, the 'big fourteen' is likely to include the following additional destinations: Germany, France, Türkiye, United Arab Emirates, China, Japan, South Korea, Malaysia, Italy, Spain, and the Netherlands (ICEF Monitor, 2024; 2025d).

The **Study in Europe region**, although performing very strongly to date, is **likely to face intensifying competition** from **less traditional destination countries** seeking to strengthen their position in the global higher education landscape. Growth forecasts predict that the strongest competition for talent will come from the **Middle East and Asia**. Among the **top-15 global study destinations, the United Arab Emirates, Malaysia, and Japan are projected to gain the most ground**, driven by sustained investments in internationalisation, including English-medium instruction, and the streamlining of visa processes (ICEF Monitor, 2025d). Other Asian destinations on upward trajectories include China, South Korea,⁶⁰ and Taiwan (ICEF Monitor, 2024b). In contrast, **Russia is projected to see its market share contract** due to safety concerns, reputational damage and logistical issues arising from its ongoing war of aggression against Ukraine (ICEF Monitor 2025c; Quacquarelli Symonds, 2025).

This same forecast includes specific predictions concerning two destinations in the Study in Europe region: Türkiye and the Netherlands, which in 2022 occupied 8th and 13th place respectively in the global top-15 ranking.⁶¹ Between now and 2030, Türkiye is projected to rise to 7th most popular destination country globally, consistent with the rapid 10-year growth described in this report. Its emergence as a leading destination for students from the Middle East, North Africa, and Central Asia reflects targeted promotional efforts in these regions and a broad scholarship offer (OECD, 2024). In the same period, the Netherlands is expected to drop to 14th place, largely as a result of a more restrictive policy environment, which has seen active international student recruitment curtailed, and a proposed new bill containing other measures to manage the inflow of students.

On the demand side, **the number of internationally mobile students worldwide is expected to reach almost 9 million by 2030** (ICEF Monitor, 2025d). **China and India are set to remain the leading suppliers of outbound students until 2030** due to their high volume of middle- and high-income households. Notable ‘rising stars’ in the global outbound student market include **Vietnam, the Philippines, Indonesia, and Bangladesh**. A rapidly expanding middle class and positive macroeconomic outlook contribute to the high growth potential of these countries (British Council, 2024a). Recent analysis indicates that students from these emerging outbound markets seem to favour destinations in Asia (notably Japan) and Europe over the traditional ‘big four’.

As for what makes a study destination attractive to degree-mobile students, large scale surveys reveal that **affordability and expected return on investment are now prioritised over academic reputation** (for example, university rankings; ICEF Monitor, 2025d). Affordability is a particularly important factor amongst students interested in destinations outside of the ‘big four’ (ICEF Monitor, 2024b). Return on investment is determined by post-study visa rules and access to the labour market, as well as longer-term employment prospects and earning potential, whether in the host country or upon return to the home country. For many degree-mobile students, the ability to stay and work in the host country after graduation is a critical factor in the choice of study destination. By supporting international student retention through improved pathways to employment and residency, the EU also stands to boost its competitiveness in the global race for talent.

These macro-trends and projections present an opportunity for the Study in Europe region to further consolidate and strengthen its position as a leading global study destination, attracting international talent to contribute to a Union of Skills in Europe. As more international enrolment data become available in the coming years, it will be possible to fully assess the impact of current developments on mobility flows between the Study in Europe region and the rest of the world.

60 With its Study Korea 300K Project, the country aims to attract 300,000 international students and establish itself as a global education hub (OECD, 2024).

61 Global top-15 ranking is based on UNESCO data for 2022 and includes mobility between Study in Europe countries. Other Study in Europe countries ranked in the global top-15 destinations are Germany (3rd), France (7th) and Poland (15th).

7. Annex

7.1. Glossary of terms

Study in Europe region: The Study in Europe region comprises all twenty-seven EU Member States plus six third countries associated to the Erasmus+ programme: Liechtenstein, North Macedonia, Norway, Serbia, and Türkiye. These countries are fully participating in the European Union's Erasmus+ programme. This region is not part of the continents and subregions of the United Nations geoscheme.

Union of Skills: The European Union faces growing skills and labour shortages as job requirements evolve and the population ages. To address these issues and boost the EU's competitiveness, the European Commission launched the Union of Skills—a plan to strengthen education, training, and lifelong learning. It aims to raise basic and advanced skills, enable continuous upskilling, support EU-wide recruitment, and attract and retain top global talent.

Tertiary education: also known as higher education, tertiary education builds on secondary education, providing learning activities in specialised fields of education. It entails learning at a high level of complexity and specialisation. Tertiary education includes what is commonly understood as academic education but also includes advanced vocational or professional education.⁶² Tertiary education includes levels 5 to 8 of the International Standard Classification of Education (ISCED): Short-cycle tertiary education (ISCED 5), Bachelor or equivalent level (ISCED 6), Master or equivalent level (ISCED 7), Doctoral or equivalent level (ISCED 8).⁶³

English-taught programme: Tertiary education programme taught through English.

Degree mobility: Degree-mobile students are tertiary students who have received a leaving certificate of their upper secondary or post-secondary non-tertiary programme in a country different from the one where their institution of tertiary degree study is located. This means that students on degree-seeking mobility programmes have physically crossed a border with the aim of studying and obtaining a tertiary education degree in their destination country. Degree mobile students are referred to as 'mobile students' in the database.

Credit mobility: Credit mobile students are students who have completed a temporary tertiary education study period and/or work placement abroad, usually for the purpose of gaining academic credits that will be recognised in the institution of enrolment. In the case of credit mobility, the mobile student does not obtain a degree from the host institution.⁶⁴

International student: International students are defined as those who completed their prior education in a different country and do not reside permanently in the host country.⁶⁵

Foreign student: A person who studies in a country of which they are not a national. Unlike international students, foreign students have not necessarily come to the country in which they reside in order to study.

62 From <https://databrowser.uis.unesco.org/resources/glossary/2824?search=tertiary+education>

63 From [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=International_Standard_Classification_of_Education_\(ISCED\)](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=International_Standard_Classification_of_Education_(ISCED))

64 From <https://ec.europa.eu/eurostat/web/education-and-training/information-data#Learning%20mobility>

65 From <https://www.oecd.org/en/data/indicators/international-student-mobility.html>

Blended mobility: Blended mobility combines physical mobility abroad with a virtual component, creating an integrated learning experience that involves both online and face-to-face interaction. The virtual element can occur before, during, or after the physical stay and includes activities such as preparation, collaborative projects, and reflection. This ensures that even short-term mobility remains meaningful by extending engagement beyond the time spent abroad (Snezana, 2022).

Introduced in the 2021–2027 Erasmus+ programme, blended mobility responds to the need for flexibility and inclusiveness in international education, accelerated by digitalisation and lessons from the COVID-19 pandemic. It aligns with the Erasmus+ priorities of digitalisation, inclusion, sustainability, and aims to broaden participation by overcoming barriers such as cost, family obligations, and academic calendars.

7.2. List of abbreviations

EU: European Union

EEA: European Economic Area

OECD: Organisation for Economic Co-operation and Development

EHEA: European Higher Education Area

ETP: English-taught programme

UIS: UNESCO Institute for Statistics

7.3. Supplementary tables

Table A1. *Total absolute number of incoming degree students per host country in the Study in Europe region in 2013 and 2022 (excluding incoming students from within the region).*

Host country	2013	2022
Germany	103,702	263,606
Türkiye	27,703	234,233
France	172,406	222,407
Poland	19,471	71,275
Italy	60,723	64,098
Spain	39,496	62,845
Portugal	11,723	42,167
Netherlands	15,652	30,424
Czechia	12,018	26,634
Hungary	7,385	24,525
Romania	14,607	22,953
Ireland	10,455	20,996
Austria	13,548	19,570
Belgium	9,814	18,583
Finland	13,793	17,855
Sweden	11,724	14,940
Serbia	8,046	10,241
Slovakia	1,174	8,491
Norway	5,980	8,125
Denmark	6,468	8,039
Bulgaria	2,627	7,938
Lithuania	3,205	6,872
Latvia	1,693	6,562
Cyprus	3,149	6,207
Greece	12,752	5,167
Estonia	576	3,285
Croatia	240	3,154
Slovenia	517	2,638
Malta	380	2,102
Luxembourg	598	1,227
Iceland	405	1,104
North Macedonia	180	332

Source: UIS and OECD stats, 2025

Table A2. *Distribution of incoming degree students by country of origin income classification per host country in the Study in Europe region (excluding incoming students from within the region).*

Host country	Low-income countries	Lower-middle-income countries	Upper-middle-income countries	High-income countries	Total
Austria	4.0%	30.4%	42.5%	23.1%	100.0%
Belgium	12.9%	54.1%	21.9%	11.2%	100.0%
Bulgaria	2.1%	31.0%	24.2%	42.7%	100.0%
Croatia	0.4%	3.6%	84.0%	12.0%	100.0%
Cyprus	1.1%	81.7%	9.7%	7.5%	100.0%
Czechia	1.7%	37.1%	54.0%	7.1%	100.0%
Denmark	3.7%	26.1%	37.0%	33.2%	100.0%
Estonia	0.7%	47.9%	40.4%	11.0%	100.0%
Finland	2.9%	54.4%	31.5%	11.1%	100.0%
France	8.9%	63.6%	22.0%	5.5%	100.0%
Germany	8.0%	43.8%	34.1%	14.1%	100.0%
Greece	12.0%	21.2%	58.4%	8.4%	100.0%
Hungary	6.1%	51.7%	30.0%	12.3%	100.0%
Iceland	2.4%	28.6%	19.3%	49.7%	100.0%
Ireland	0.9%	28.9%	27.1%	43.1%	100.0%
Italy	4.6%	45.4%	37.8%	12.3%	100.0%
Latvia	0.3%	77.0%	16.5%	6.2%	100.0%
Lithuania	1.1%	44.4%	36.4%	18.1%	100.0%
Luxembourg	4.8%	49.3%	34.6%	11.3%	100.0%
Malta	1.6%	48.1%	19.5%	30.8%	100.0%
Norway	5.7%	53.0%	25.7%	15.6%	100.0%
Poland	3.5%	65.6%	26.5%	4.4%	100.0%
Portugal	20.0%	31.6%	45.2%	3.1%	100.0%
Serbia	1.3%	3.1%	91.6%	4.0%	100.0%
Slovakia	1.5%	75.6%	17.2%	5.6%	100.0%
Slovenia	1.1%	16.5%	78.1%	4.3%	100.0%
Sweden	3.6%	50.3%	32.8%	13.3%	100.0%
Netherlands	4.4%	29.0%	41.6%	25.0%	100.0%
Türkiye	38.5%	24.8%	35.6%	1.1%	100.0%
North Macedonia	0.6%	10.8%	83.1%	5.4%	100.0%
Romania	4.1%	21.0%	59.8%	15.2%	100.0%
Spain	0.5%	18.5%	62.6%	18.3%	100.0%

Source: UIS and OECD stats, 2025, and World Bank country classifications by income level (<https://blogs.worldbank.org/en/opendata/world-bank-country-classifications-by-income-level-for-2024-2025>).

Note: Countries with no World Bank Income Classification are excluded.

Table A3. *Number of incoming students per degree type for each host country in the Study in Europe region in 2022 (excluding incoming students from within the region).*

Host country	Short cycle	Bachelor	Master	PhD
Austria	415	8,314	8,347	2,494
Belgium	836	6,433	9,111	2,203
Bulgaria	m	2,778	842	318
Croatia	0	1,647	1,251	256
Czechia	27	15,261	8,804	2,542
Denmark	606	1,903	3,835	1,695
Estonia	m	1,079	1,672	534
Finland	m	8,196	5,943	3,716
France	9,251	73,207	120,561	19,388
Germany	0	84,947	148,188	30,471
Greece	m	4,615	276	276
Hungary	28	10,916	11,257	2,334
Iceland	126	383	446	149
Ireland	475	10,482	7,208	2,831
Italy	0	27,458	33,115	5,325
Latvia	201	4,060	2,126	175
Lithuania	m	4,047	2,671	154
Luxembourg	1	99	713	414
Norway	55	2,114	4,617	1,339
Poland	1	50,226	20,356	692
Portugal	3,010	19,277	12,616	7,264
Romania	m	10,746	11,451	756
Slovakia	27	5,994	2,111	359
Spain	5,142	12,778	29,861	15,064
Sweden	4	2,109	8,956	3,871
Netherlands	m	18,450	11,974	m
Türkiye	30,750	147,952	45,509	10,022

Source: OECD stats, 2025.**Note:** "m" = missing data

Table A4. *Distribution of incoming degree students in 2022 by diploma type for the major global destinations (excluding students from the Study in Europe region).*

Destination	Degree type				Total
	Total BA	Total MA	Total PhD	Total short cycle	
Australia	39.7%	28.0%	5.0%	27.3%	100,0%
Canada	47.7%	13.1%	6.4%	32.9%	100,0%
Study in Europe region	44.0%	42.5%	9.3%	4.2%	100,0%
United Kingdom	36.0%	54.7%	6.2%	3.1%	100,0%
United States of America	50.0%	50.0%	*	*	100,0%
Rest of the world	49.3%	18.9%	11.1%	20.6%	100,0%

Source: OECD stats, 2025

Notes: Degree type data is not available for Russia because it is not part of the OECD.

*No data are available for PhD and short-cycle degrees for the USA.

Table A5. *Distribution of degree-mobile students by field of study per EU receiving country in 2022 (including intra-EU mobility).*

Distribution of mobile students by field of study (in %)				
Destination country	Social sciences, journalism and information	Business, administration and law	Health and welfare	Science, technology, engineering and mathematics
Austria	16	22	9	32
Belgium	11	14	34	19
Czechia	10	21	17	33
Denmark	9	25	9	40
Estonia	10	31	5	31
Finland	4	21	12	46
France	10	32	6	35
Germany	7	18	7	51
Greece	16	13	13	32
Ireland	7	18	25	31
Italy	16	16	13	31
Latvia	4	37	29	20
Lithuania	12	26	29	20
Luxembourg	13	35	3	33
Netherlands	*	*	*	*
Poland	16	27	14	15
Portugal	13	26	14	26
Slovenia	14	25	8	33
Spain	12	26	22	21

Distribution of mobile students by field of study (in %)				
Destination country	Social sciences, journalism and information	Business, administration and law	Health and welfare	Science, technology, engineering and mathematics
Sweden	13	11	11	46
Slovak Republic	8	13	36	21
Bulgaria	5	8	58	11
Croatia	7	23	21	26
Romania	7	16	44	16
EU-25 total	11	23	13	32

Source: OECD, Education at a glance, 2024.

Note: *No field of study data are available for the Netherlands.

Table A6. Total number of outgoing degree students from each country of origin to destinations outside of the Study in Europe region in 2013 and 2022.

Country of origin	2013	2022
France	41,431	54,328
Germany	38,954	33,475
Italy	17,901	30,196
Spain	11,035	24,134
Türkiye	23,914	23,825
Romania	8,839	13,742
Ireland	14,261	11,833
Greece	13,886	10,860
Poland	7,487	10,605
Portugal	4,989	8,867
Cyprus	11,455	7,041
Netherlands	6,292	6,869
Norway	9,176	6,010
Sweden	9,876	5,881
Belgium	4,878	5,271
Bulgaria	8,007	5,237
Austria	4,437	4,621
Serbia	3,658	3,875
Lithuania	5,707	3,833
Croatia	4,060	3,831
Czechia	2,448	3,689
Hungary	2,511	3,415
Denmark	2,961	2,699

Country of origin	2013	2022
Finland	2,964	2,446
Slovakia	2,335	2,443
Latvia	2,630	2,337
Luxembourg	1,672	1,588
Estonia	1,511	1,520
Liechtenstein	820	955
Iceland	747	820
North Macedonia	627	791
Slovenia	754	742
Malta	1,223	726

Table A7. List of country by continent and region according to United Nations geoscheme classification, also used by UNESCO. Countries within the Study in Europe region (i.e., Erasmus+ Programme Countries) in bold.

Continent	Region	Country
Africa	Eastern Africa	Burundi, Comoros, Djibouti, Eritrea, Ethiopia, Kenya, Madagascar, Malawi, Mauritius, Mozambique, Rwanda, Seychelles, Somalia, South Sudan, Tanzania, Uganda, Zambia, Zimbabwe
	Middle Africa	Angola, Cameroon, Central African Republic, Chad, Congo, Democratic Republic of the Congo, Equatorial Guinea, Gabon, Sao Tome and Principe
	Northern Africa	Algeria, Egypt, Libya, Morocco, Sudan, Tunisia
	Southern Africa	Botswana, Lesotho, Namibia, South Africa, Swaziland
	Western Africa	Benin, Burkina Faso, Cabo Verde, Gambia, Ghana, Guinea, Guinea-Bissau, Ivory Coast, Liberia, Mali, Mauritania, Niger, Nigeria, Senegal, Sierra Leone, Togo
Asia	Central Asia	Kazakhstan, Kyrgyzstan, Russia, Tajikistan, Turkmenistan, Uzbekistan
	Eastern Asia	China, Hong Kong, Special Administrative Region of China, Japan, Macao, Special Administrative Region of China, Mongolia, North Korea, South Korea
	South-Eastern Asia	Brunei, Cambodia, East Timor, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam
	Southern Asia	Afghanistan, Bangladesh, Bhutan, India, Iran, Maldives, Nepal, Pakistan, Sri Lanka
	Western Asia	Armenia, Azerbaijan, Bahrain, Cyprus , Georgia, Iraq, Israel, Jordan, Kuwait, Lebanon, Oman, Qatar, Saudi Arabia, State of Palestine, Syria, Türkiye , United Arab Emirates, Yemen

Continent	Region	Country
Europe	Eastern Europe	Belarus, Bulgaria, Czechia, Hungary , Moldova, Poland, Romania, Slovakia , Ukraine
	Northern Europe	Denmark, Estonia, Finland, Iceland, Ireland, Latvia, Lithuania, Norway, Sweden, Netherlands , United Kingdom
	Southern Europe	Albania, Andorra, Bosnia and Herzegovina, Croatia , Gibraltar, Greece, Italy, Malta , Montenegro, North Macedonia, Portugal , San Marino, Serbia, Slovenia, Spain , Vatican City
	Western Europe	Austria, Belgium, France, Germany, Liechtenstein, Luxembourg , Monaco, Switzerland
Latin America and the Caribbean	Caribbean	Anguilla, Antigua and Barbuda, Bahamas, Barbados, Cayman Islands, Cuba, Dominica, Dominican Republic, Grenada, Haiti, Jamaica, Montserrat, Puerto Rico, Saint Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines, Trinidad and Tobago, Turks and Caicos Islands, Virgin Islands
	Central America	Belize, Costa Rica, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama
	South America	Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, Guyana, Paraguay, Peru, Surinam, Uruguay, Venezuela
Northern America	Northern America	Bermuda, Canada, United States of America
Oceania	Australia and New Zealand	Australia, New Zealand
	Melanesia	Fiji, Papua New Guinea, Solomon Islands, Vanuatu
	Micronesia	Kiribati, Marshall Islands, Micronesia, Nauru, Palau
	Polynesia	Cook Islands, Niue, Samoa, Tokelau, Tonga, Tuvalu

Note: This table includes all countries of origin listed in the OECD/UNESCO dataset. Omission from this list is without prejudice to positions on a country's status.

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