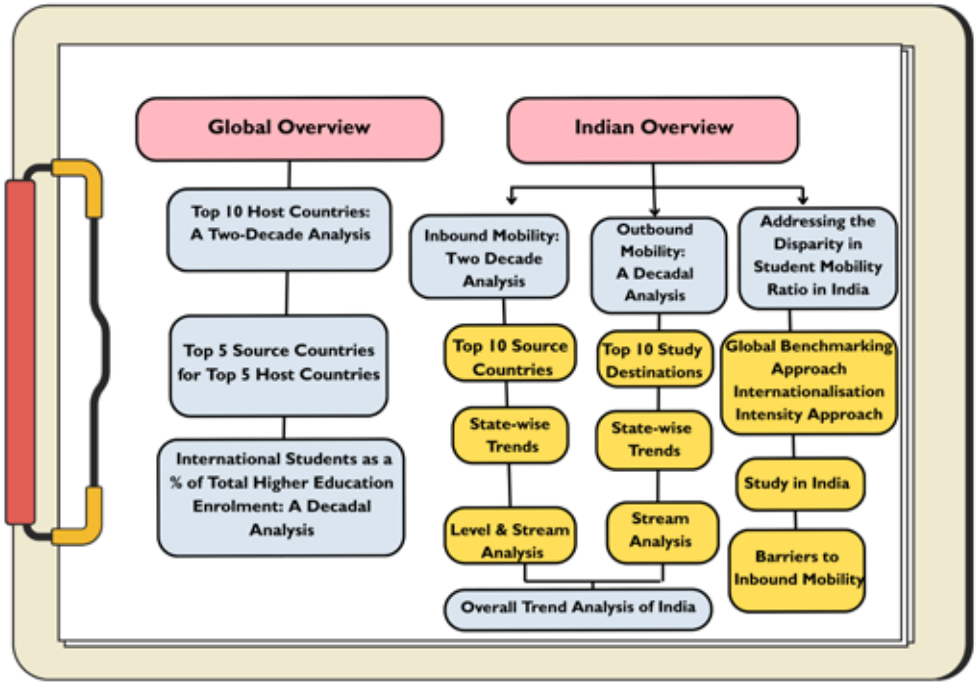
Chapter

INTERNATIONAL STUDENT MOBILITY



3.1 OVERVIEW

International student mobility has become a pivotal feature of global higher education in the 21st century. As per the 2019 UNESCO Global Convention on the Recognition of Qualifications concerning Higher Education, mobility refers to the "physical or virtual movement of individuals outside their country for the purpose of studying, researching and teaching". This movement of students and scholars across borders not only reflects the aspirations of individuals seeking quality education and career prospects but also embodies the growing interdependence among educational systems worldwide.

This chapter provides a comprehensive temporal analysis of international student flows, examining both global trends and India's patterns. Through systematic data analysis from the year 2000 to 2024, it traces the shifts in inbound and outbound student flows, host-source dynamics, enrolment percentages and disciplinary preferences. Comparative metrics such as growth rates, percentage share of international students, inbound-outbound ratios and net flow of students have been used to interpret trends.

3.2 INTERNATIONAL STUDENT MOBILITY: GLOBAL OVERVIEW

Over the past two decades, the global landscape of higher education has witnessed a remarkable surge in international student mobility, reflecting the rising demand for globally competitive education. Table 3.1 depicts that there has been a 3x increase in the number of internationally mobile students worldwide, from 22 lakh in 2001 to 69 lakhs in 2022. This upward trajectory underscores the increasing importance of cross-border education in shaping transnational education and fostering international collaboration.

Table 3.1: International Student Mobility (2001-2022)

Year	No. of Students (in lakhs)	Year	No. of Students (in lakhs)
2001	22	2012	41
2002	25	2013	43
2003	26	2014	45
2004	27	2015	48

Year	No. of Students (in lakhs)	Year	No. of Students (in lakhs)
2005	28	2016	51
2006	29	2017	54
2007	31	2018	57
2008	33	2019	61
2009	35	2020	66
2010	38	2021	64
2011	40	2022	69

Source: Migration Data Portal, International Organisation on Migration (IOM)[1]

Note: The data reflects stock figures over the specified time period.

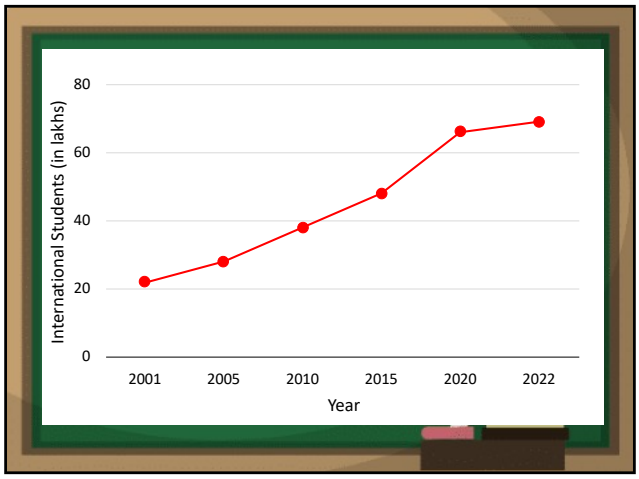


Figure 3.1: International Student Mobility (2001-2022)

Figure 3.1 depicts the number of international students globally between 2001 and 2022, reflecting a 214% rise over 22 years. Between 2001 and 2010, the number rose from 22 to 38 lakhs, an increase of approximately 73%, driven by the early 2000s wave of globalisation and the expansion of higher education systems. From 2010 to 2015, growth continued steadily, reaching 48 lakhs in 2015, a 26% increase over five years aligned with the internationalisation strategies at the government and institutional levels. The period from 2015 to 2020 saw further growth, with numbers rising from 48 to 66 lakhs, a 37.5% increase over five years, reflecting continued global demand.

During the COVID-19 pandemic (2020–2021), the growth rate slowed from 66 to 64 lakhs, indicating a minor decline due to travel restrictions, health concerns and campus closures. However, 2022 marked a strong recovery with student numbers rising to 69 lakhs, a 7.8% increase from the previous year. This is one of the sharpest annual increases of the entire period and can be attributed to pent-up demand, resumption of cross-border mobility and universities adopting hybrid and flexible models.

3.2.1 Top 10 Host Countries for International Students: A Two-Decade Analysis

International student mobility has undergone significant transformation with shifts in the global higher education landscape influencing where students choose to study. Host countries play a crucial role in this dynamic shaped by factors such as quality of education, immigration policies, cultural openness, affordability and employment opportunities. Traditional education destinations have faced growing competition from emerging players that have strategically positioned themselves as attractive alternatives. As students increasingly weigh long-term prospects alongside academic and research quality, the global map of top host countries continues to evolve, reflecting broader political, economic and social trends.

[1] Migration Data Portal. (2022). Internationally mobile students. https://www.migrationdataportal.org/international-data?i=stud_in_&t=2022

Table 3.2: Top 10 Host Countries for International Students (2004-2024)

Year	2004		2014		2024	
Rank	Country	No. of Students	Country	No of Students	Country	No. of Students
1	USA	5,72,509	USA	9,74,926	USA	11,26,690
2	UK	3,00,050	UK	4,93,570	Canada	8,42,760
3	Germany	2,46,136	China	3,77,054	UK	7,58,855
4	France	2,45,298	Germany	3,01,350	Australia	4,37,485
5	Australia	1,51,798	France	2,98,902	France	4,12,100
6	Japan	1,17,302	Australia	2,69,752	Germany	3,67,578
7	China	1,10,844	Canada	2,68,659	Russia	3,21,845
8	Russia	75,786	Japan	1,39,185	South Korea	2,08,962
9	Canada	66,576	Netherlands	90,389	China	2,00,892
10	South Africa	49,979	New Zealand	46,659	Spain	1,49,279

Source: Gosende, R. & Gürüz, K. (2007); Project Atlas 2014, 2024[2]

Note: The data reflects stock figures over the specified time period.

Figure 3.2 depicts the leading host countries for international students over two decades with USA, Canada and UK emerging as the top three destinations in 2024. Other significant destinations include Australia, France, Germany and China, each attracting a globally mobile student population. The USA has consistently remained the top destination with international student numbers rising from 5.73 lakhs in 2004 to 9.75 lakhs in 2014 and reaching 11.27 lakhs in 2024. This sustained lead underscores the enduring appeal of American higher education, driven by globally ranked HEIs with quality education, diverse programmes, research funding, knowledge creation and innovation, career prospects and work permits. By preparing students for the global workforce and supporting long-term national economic development, USA has enhanced its national reputation and competitiveness.

The UK showed steady growth, with student numbers increasing from 3 lakhs in 2004 to 4.94 lakhs in 2014 and rising further to 7.59 lakhs in 2024. This reflects continued efforts to internationalise higher education through short programmes and language benefits, as well as policy shifts like easy visa process and introduction of graduate route visas. Canada, which was not among the top five in 2004, made remarkable gains to host 2.69 lakh students in 2014 and 8.43 lakhs by 2024. This rapid growth of about 1,266% over 20 years can be attributed to several factors, including Canada's recent International Education Strategy (2019–2024), which focuses on diversifying source countries, supporting Canadian students studying abroad, and building sustainable global partnerships, aligning with the country's broader commitment to equity and global citizenship.

Though their relative rankings declined, Germany and France showed consistent yet slower growth, hosting over 3.68 and 4.12 lakh students respectively by 2024. Australia demonstrated significant expansion, growing from 1.52 lakh students in 2004 to 4.37 lakh in 2024, bolstered by targeted recruitment, work rights, PR pathways and regional partnerships. China, a top host in 2014, experienced a relative decline by 2024, while new entrants such as South Korea and Spain reflect evolving student preferences for studying abroad.

[2] Institute of International Education. (2022). Project Atlas: Explore Global Data. https://www.iie.org/research-initiatives/project-atlas/explore-global-data/

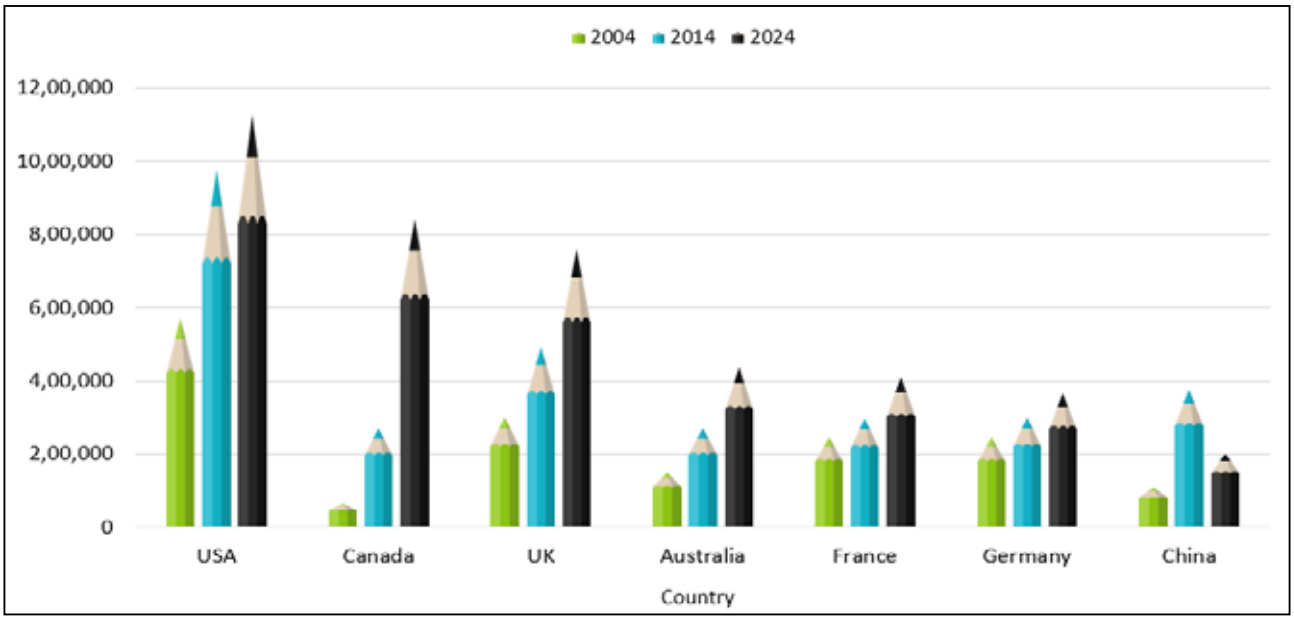


Figure 3.2: Top 7 Host Countries for International Students (2004-2024)

3.2.2 Source Countries of International Students: Leading Places of Origin for Top 5 Host Countries

The patterns of international student mobility are also deeply influenced by the source countries from which students originate. Host countries often receive students from specific regions based on historical ties, language, bilateral agreements and migration networks. While countries like China and India have traditionally been major sources due to their large youth populations, shifts in economic development, domestic education capacity and geopolitical factors have led to diversification in student origins.

Table 3.3: Top 5 Source Countries for Top 5 Host Countries (2014-2024)

Year	2014				2024			
Rank	Top Host Country	Top 5 Source Countries	No. of Students from Top 5 Source Countries	% of Total International Students from Top 5 Source Countries	Top Host Country	Top 5 Source Countries	No. of Students from Top 5 Source Countries	% of International Total Students from Top 5 Source Countries
1	USA	China, India, South Korea, Saudi Arabia, Canada	5,27,448	54.1	USA	India, China, South Korea, Canada, Taiwan	7,04,304	62.5
2	UK	China, USA, India, Nigeria, Germany	1,78,610	36.1	Canada	India, China, Nigeria, Philippines, France	5,53,220	65.6

3	China	South Korea, USA, Thailand, Russia, Japan	1,40,681	37.3	UK	India, China, Nigeria, Pakistan, USA	4,57,030	60.2
4	Germany	Turkey, China, Russia, Austria, Italy	99,431	32.9	Australia	China, India, Nepal, Vietnam, Pakistan	3,00,951	68.7
5	France	Morocco, China, Algeria, Tunisia, Italy	1,07,201	35.8	France	Morocco, Algeria, China, Italy, Senegal	1,38,193	33.5

Source: Project Atlas 2014, 2024[3]

Note: The data reflects stock figures over the specified time period.

As depicted in Table 3.3, the decade from 2014 to 2024 reflects a diversification in the landscape of international student mobility across major host countries with respect to their source countries. In 2014, USA led as the top host country, with China, India, South Korea, Saudi Arabia and Canada accounting for 54.1% of its international students. By 2024, the USA remained the largest host, but with a change in source countries. India overtook China as the leading sender, alongside South Korea, Canada and Taiwan, raising the share of the top five countries to 62.5%.

The UK, which earlier drew its largest cohorts from China, USA, India, Nigeria and Germany, was overtaken by Canada as the second-largest destination by 2024. Canada's international student intake grew substantially, with India, China, Nigeria, Philippines and France forming 65.6% of its students. Meanwhile, China is out of the list of top 5 host countries. The UK rose to the third place in 2024, primarily hosting students from India, China, Nigeria, Pakistan and USA, accounting for 60.2% of its total.

Australia emerged as the fourth major host, attracting students from China, India, Nepal, Vietnam, and Pakistan, who together made up 68.7% of its international cohort. France remained in the top five across both years, but the profile of its student inflows shifted slightly, with Morocco, Algeria, China, Italy and Senegal making up 33.5% of its total in 2024. The trend reflects the rising dominance of India and China as key source countries and an increasing concentration of international enrolments coming from a narrower group of sending nations.

3.2.3 International Students as a Percentage of Total Higher Education Enrolment: Leading Countries and India

International student enrolment as a percentage of total higher education enrolment is a key indicator of a country's global engagement in the academic sector. It reflects how attractive a nation's higher education system is to students from around the world. A higher proportion of international students brings numerous benefits, including enhanced cultural diversity, enriched classroom learning, robust research collaboration and significant economic contributions.

[3] Institute of International Education. (2022). Project Atlas: Explore Global Data. https://www.iie.org/research-initiatives/project-atlas/explore-global-data/

Table 3.4: International Students as a Percentage of Total Higher Education Enrolment (2014-2024)

Year	2014		2024	
Rank	Country	% of Students	Country	% of Students
1	UK	22	Canada	39
2	Australia	21	Australia	31
3	Ireland	16	UK	27
4	Canada	14	Netherlands	16
5	Netherlands	13	France, Finland & Hungary	14
6	Denmark	12.5	Germany	13
7	France	12	New Zealand	12
8	Germany	11	Denmark & Sweden	11
9	New Zealand	10.5	Spain & Poland	9
10	Norway	10	South Korea	7
	India	0.12	India (2022)	0.10

Source: Project Atlas 2014, 2024[4]; India's data from AISHE 2014-15, 2021-22[5]

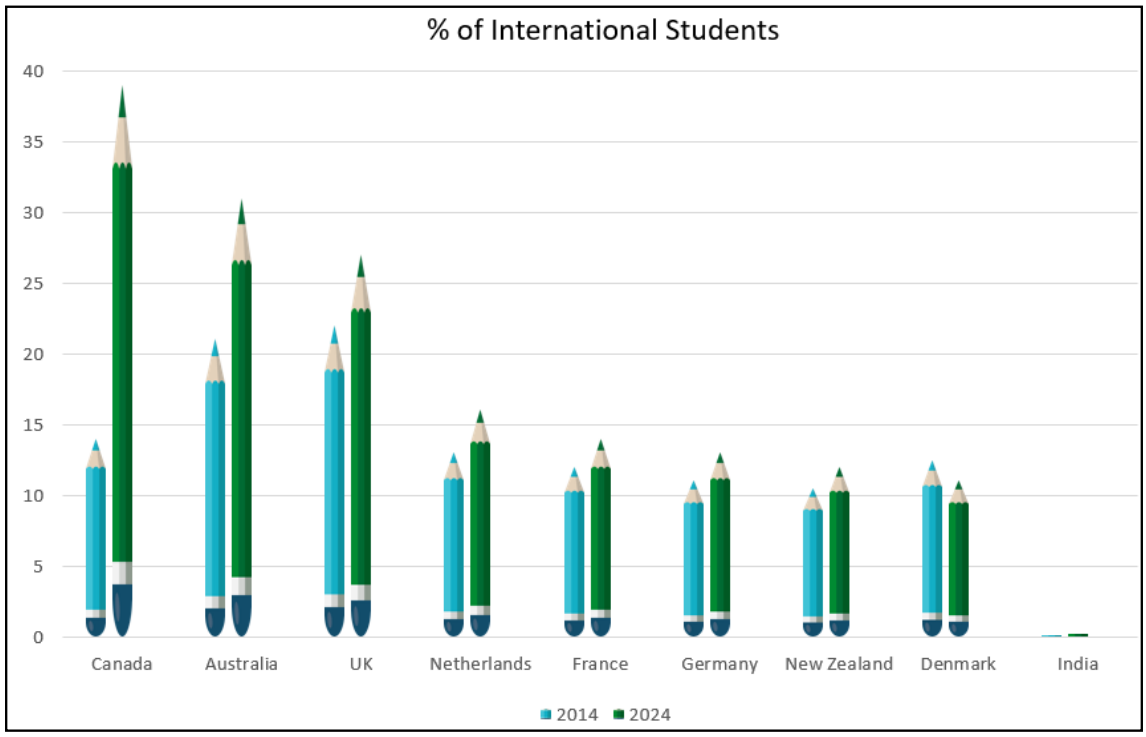


Figure 3.3: International Students as a Percentage of Total Higher Education Enrollment (2014-2024)

Figure 3.3 indicates that Canada witnessed a dramatic rise in international students as a percentage of total higher education enrolment from 14% to 39% between 2014 and 2024, making it the top-ranking country in this category in 2024. This surge reflects Canada's deliberate efforts to attract global talent through supportive immigration policies and globally ranked institutions. Australia demonstrated significant growth from 21% to 31% over the same period, remaining a

[4] Institute of International Education. (2022). Project Atlas: Explore Global Data. https://www.iie.org/research-initiatives/project-atlas/explore-global-data/

[5] AISHE Report (2013-14 to 2021-22). https://aishe.gov.in/aishe-final-report/

preferred destination due to its strong academic offerings, student support systems and strategic positioning in the Asia-Pacific region.

While the UK continues to benefit from its historic academic reputation and globally recognized universities, recent shifts in visa policies and competition from other English-speaking countries has moderated its growth from 22% in 2014 to 27% in 2024. The Netherlands witnessed a smaller but steady increase, from 13% to 16%, aided by the growing availability of English-taught programmes and concerted internationalisation strategies. Similarly, France and Germany experienced modest increases from 12% to 14% and from 11% to 13% respectively, particularly due to affordable tuition fees and research opportunities. In contrast, New Zealand's share grew marginally from 10.5% to 12%, while Denmark's declined from 12.5% to 11%, indicating a loss of momentum in attracting international students.

India, however, remains an outlier with a negligible percentage of international students and a decrease from 0.12% in 2014 to 0.10% in 2022. Despite its ambitions to become a global higher education destination, India's share of international students remains minimal due to challenges such as limited branding, communication and outreach of its higher education system abroad, infrastructure gaps and regulatory barriers that hinder international mobility. This trend underscores the urgent need for reforms to strengthen India's global visibility and institutional capacity.

3.3 INTERNATIONAL STUDENT MOBILITY: INDIAN OVERVIEW

In recent decades, India has aimed to position itself as a preferred destination for learners worldwide with its expanding academic infrastructure, growing emphasis on quality, commitment to affordability, and policy enablers. At the same time, it continues to be a significant contributor to outbound student flows.

3.3.1 Inbound Mobility of Students to India: A Two-Decade Analysis

India's inbound student mobility has undergone significant changes over the past two decades, marked by three broad phases: a gradual build-up in the early 2000s, a sharp rise between 2012 and 2019 and a period of mild fluctuation post-2020. Figure 3.4 displays the inbound mobility trajectory from 2000-01 to 2021-22 revealing a steady expansion in India's higher education footprint and progression in attracting international students.

Table 3.5: Inbound Mobility of Students to India (2000–2022)

Academic Year	No. of International Students Studying in India	No. of Students Enrolled in Higher Education (in crores)	International Students as a % of Total Higher Education Enrolment in India[6]
2000-01	6,896	0.84	0.08
2004-05	13,267	1.04	0.12
2008-09	21,778	2.16	0.10
2012-13	34,774	3.02	0.11
2013-14	39,517	3.23	0.12
2014-15	42,293	3.42	0.12
2015-16	45,424	3.46	0.13

[6] Calculation: Percentage = (x ÷ y) × 100, where x = number of international student enrolments in a given year, and y = total number of students enrolled in higher education in that year

Academic Year	No. of International Students Studying in India	No. of Students Enrolled in Higher Education (in crores)	International Students as a % of Total Higher Education Enrolment in India[6]
2016-17	47,575	3.57	0.13
2017-18	46,144	3.66	0.12
2018-19	47,427	3.74	0.12
2019-20	49,348	3.85	0.12
2020-21	48,035	4.13	0.11
2021-22	46,878	4.33	0.10

Source: Yeravdekar, V. R. (2016)[7]; UGC Annual Report 2000-01, 2004-05[8]; Statistics of Technical and Higher Education 2008-09[9]; AISHE Report 2012-13 to 2021–22[10]

Note: The data reflects stock figures over the specified time period.

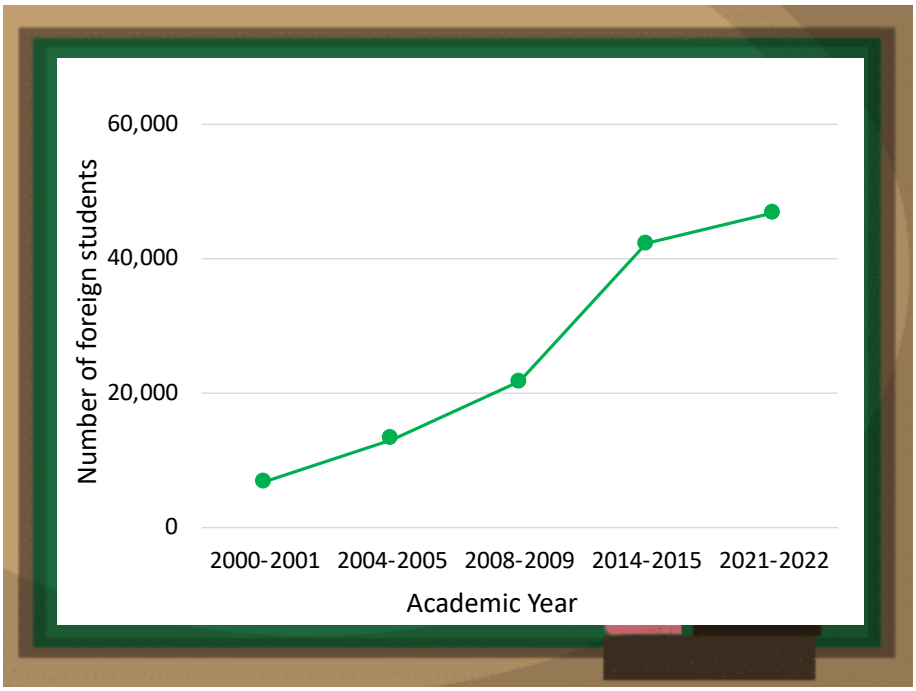


Figure 3.4: Inbound Mobility of Students to India (2000–2022)

Table 3.5 indicates that India hosted just 6,896 international students in 2000–01. This number noted modest but consistent growth in the early years of the 21st century, reaching 21,778 by 2008–09. The momentum picked up more clearly from 2012–13 onwards, with enrolment jumping to 34,774 students and then steadily increasing year-on-year. Between 2012 and 2019, India experienced a 42% increase of inbound international students peaking at 49,348 in 2019-20. This growth phase can be attributed to a mix of pull factors, including affordable tuition, a wide range

[7] Yeravdekar, V. R. (n.d.). Inbound international student mobility in India: Path to achievable success [Discussion Paper No. 2]. Forum for Indian Development Cooperation (FIDC). https://fidc.ris.org.in/sites/fidc.ris.org.in/files/Publication/FIDC_DP2.pdf

[8] University Grants Commission. (2005). UGC annual report 2004–2005. Annual Report 2004-2005_D12794.pdf

[9] Ministry of Education, Government of India. (2009). Statistics of technical and higher education 2008–2009. https://www.education.gov.in/sites/upload_files/mhrd/files/statistics-new/StatHTE_2008-09.pdf Ministry of Education, Government of India. (2009). Statistics of technical and higher education 2008–2009. https://www.education.gov.in/sites/upload_files/mhrd/files/statistics-new/StatHTE_2008-09.pdf

[10] AISHE Report (2013-14 to 2021-22). https://aishe.gov.in/aishe-final-report/

of English-medium programmes, government-led scholarship schemes and quality of education at leading Indian HEIs. India's long standing educational and cultural ties with South Asia and parts of Africa also contributed to sustained flows.

The period 2020-22 witnessed stagnation and mild decline due to the global COVID-19 pandemic's impact on student mobility. Numbers dipped to 48,035 in 2020-21 and 46,878 in 2021-22, a reversal from the pre-pandemic high. This disruption coincided not only with international travel restrictions but also with domestic changes like declining preference for engineering courses, which historically attracted many international students.

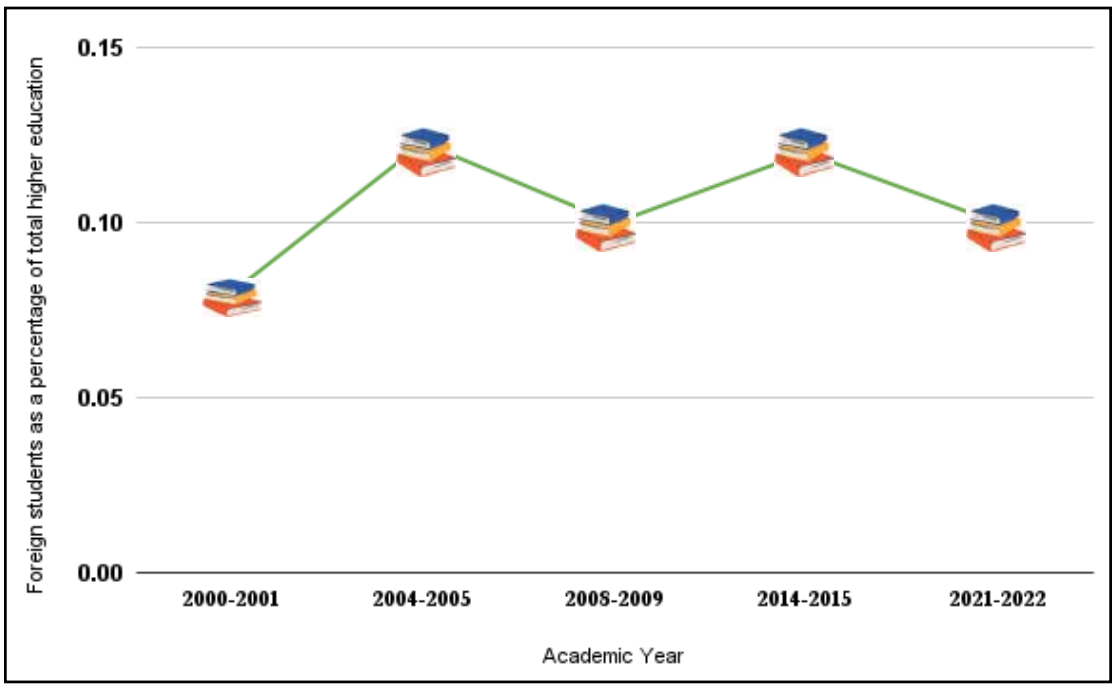


Figure 3.5: International Students as a Percentage of Total Higher Education Enrolment in India (2000-2022)

The inbound mobility of international students to India has historically remained a small fraction of total higher education enrolment. Figure 3.5 depicts international students as a percentage of total higher education enrolment in India from 2000-01 to 2021-22, showing a generally stable but modest trend with a slight decline in the latter years. In 2000-01, international students constituted only 0.08% of total enrolments. The early 2000s recorded modest percentages, with a rise to 0.12% by 2004-05, reflecting nascent internationalisation efforts and limited global appeal of Indian HEIs at the time.

By the mid-2010s, there was a gradual rise in the proportion of international students. From 0.11% in 2012-13, the share grew to a peak of 0.13% in 2016-17. This period corresponds with increased efforts by Indian institutions and policymakers to attract international students, improvements in institutional quality and expanding bilateral educational ties. Between 2017-18 and 2019-20, the percentage of international students hovered around 0.12%, indicating gradual growth in international student numbers aligned with an expanding overall higher education sector.

However, from 2020-21 onwards, there is a noticeable dip in the share of international students, falling to 0.11% in 2020-21 and further to 0.10% in 2021-22, reflecting the impact of the COVID-19 pandemic which disrupted international travel, created uncertainty in cross-border mobility and affected global student flows. While the total number of students in India's higher education system continued to grow during these years, the international student population did not keep pace, leading to a reduced proportion.

3.3.1.1 Top 10 Source Countries of International Students in India: A Decadal Analysis

Over the past decade, India has witnessed evolving patterns in the inflow of international students, reflecting broader geopolitical, economic and educational shifts. This section presents

a decadal analysis of the top source countries sending students to India, offering insights into regional trends and emerging partnerships. Understanding these dynamics is crucial for shaping future internationalisation strategies.

Table 3.6: Top 10 Source Countries of International Students in India (2012-13 to 2021-22)

Year	2012–2013		2017-18		2021–2022	
Rank	Country	No of Students	Country	No of Students	Country	No of Students
1	Nepal	7,167	Nepal	11,521	Nepal	13,126
2	Bhutan	2,468	Afghanistan	4,378	Afghanistan	3,151
3	Afghanistan	2,330	Sudan	2,220	USA	2,893
4	Iran	2,109	Bhutan	1,999	Bangladesh	2,606
5	Malaysia	1,874	Nigeria	1,866	UAE	2,287
6	Iraq	1,747	Bangladesh	1,566	Bhutan	1,562
7	Sudan	1,649	Iran	1,558	Nigeria	1,387
8	Rwanda	1,027	Yemen	1,471	Tanzania	1,264
9	Sri Lanka	1,001	USA	1,418	Zimbabwe	1,058
10	USA	852	Sri Lanka	1,248	Sudan	982

Source: AISHE Report 2012-13, 2017-18 & 2021-2022[11]

Note: **The data reflects stock figures over the specified time period.**

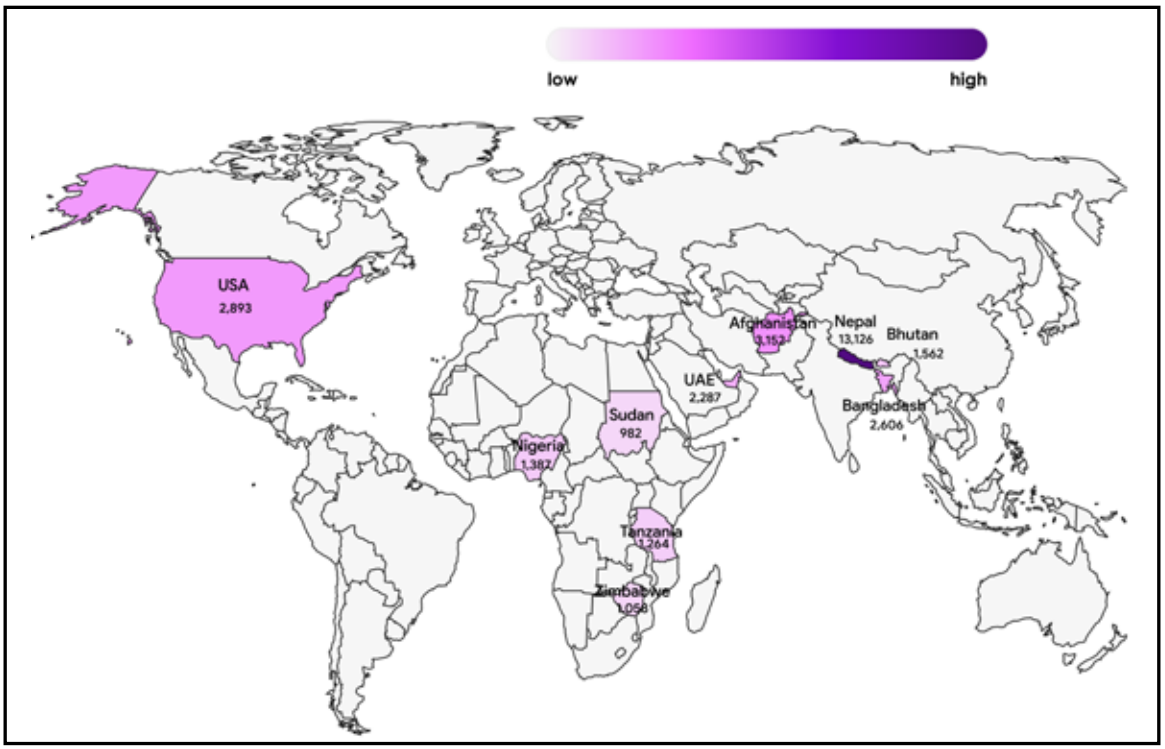


Figure 3.6: Top 10 Source Countries of International Students in India (2021-22)

Table 3.6 illustrates the changing profile of international students in India over the decade from 2012-13 to 2021-22. Nepal has consistently been the leading source country, with student numbers

[11] AISHE Report (2013-14 to 2021-22). https://aishe.gov.in/aishe-final-report/

increasing steadily from 7,167 in 2012-13 to 13,126 in 2021-22. This reflects strong historical, cultural and educational ties, geographical proximity and favourable bilateral arrangements between the two countries. Afghanistan also featured prominently throughout the period, rising from 2,330 in 2012-13 to 4,378 in 2017-18 but witnessed a decline to 3,151 in 2021-22 influenced by domestic instability and evolving migration dynamics.

Countries such as the UAE, Nigeria, Zimbabwe, and Tanzania entered the top 10 list by 2021-22, indicating broader outreach and India's increasing appeal as a higher education destination. Conversely, some countries that were once among the top contributors such as Iran, Iraq, Malaysia, Rwanda and Sri Lanka no longer appear in the latest rankings, suggesting shifts in geopolitical contexts and student preferences. Despite some fluctuation, nations like the USA, Bhutan, and Sudan maintained a presence throughout the decade, reflecting enduring educational linkages. The marginal increase in share suggests a steady if not accelerated growth, potentially through exchange programmes, research collaborations or niche interests.

A significant observation is that many of India's top source countries like Afghanistan, Sudan, Nigeria and Yemen have experienced prolonged political or economic instability. While India has served as an important higher education haven for students from conflict-affected regions, a more balanced strategy would involve expanding its internationalisation efforts toward stable and emerging economies across Southeast, Central and West Asia, Anglophone Africa, Europe and Oceania. This would strengthen India's global academic reputation and reduce volatility in enrolment trends.

3.3.1.2 Inbound International Student Trends: State-wise Overview

The State-wise distribution of international students in India between 2012 and 2022 reveals regional variations in international student concentration, with certain States emerging as consistent leaders in attracting inbound mobility. These patterns point to the influence of factors such as institutional capacity, regional connectivity and targeted State-level policies.

Table 3.7: Top 10 States with International Student Enrolment in India (2012–13 to 2021–22)

Year	2012-13		2017-18		2021-22	
Rank	State	No of Students	State	No of Students	State	No of Students
1	Karnataka	13,182	Karnataka	11,947	Karnataka	5,954
2	Tamil Nadu	4,323	Maharashtra	4,297	Punjab	5,847
3	Maharashtra	3,841	UP	4,371	Maharashtra	4,818
4	Telangana	2,700	Punjab	3,719	UP	4,231
5	UP	1,829	Tamil Nadu	3,532	Tamil Nadu	3,866
6	Delhi	1,803	Telangana	2,802	Gujarat	3,422
7	Punjab	1,397	Delhi	2,165	AP	3,106
8	West Bengal	790	AP	2,087	Delhi	2,727
9	AP	679	Haryana	2,012	Odisha	2,320
10	Gujarat	555	Gujarat	1,682	Haryana	1,689

Source: AISHE Report 2012-13, 2017-18, 2021-22[12]

Note: The data reflects stock figures over the specified time period for UG, PG, M.Phil, PhD, Diploma & PG Diploma courses.

[12] AISHE Report (2013-14 to 2021-22). https://aishe.gov.in/aishe-final-report/

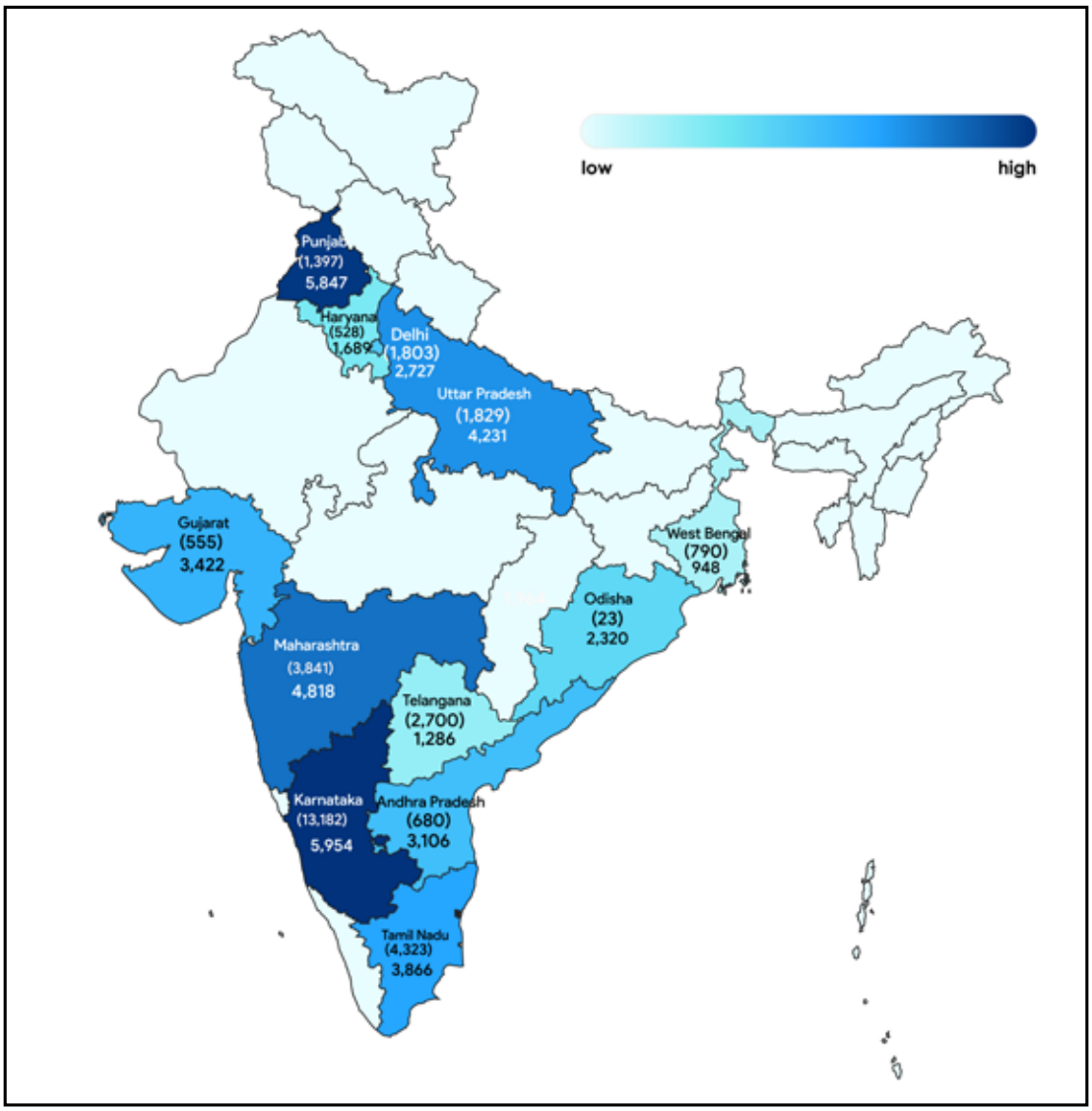


Figure 3.7: Transition in International Student Enrolment Across Top 10 Indian States (2012-13 to 2021-22)

Note: Bracketed figures refer to 2012–13; unbracketed to 2021–22.

Table 3.7 displays data on international student enrolment in Indian States from 2012-13 to 2021-22 highlighting important trends in international student preferences and institutional outreach in India. One of the most striking observations is the significant decline in overall international enrolment numbers in States that were previously major hubs. For instance, Karnataka experienced about 55% decrease from 13,182 students in 2012–13 to 5,954 in 2021-22. This may be attributed to increased competition and a plateau in institutional capacity to attract international students. Similarly, Tamil Nadu's enrolment declined from 4,323 to 3,866 over the same period, suggesting a need for renewed internationalisation efforts.

In contrast, some States witnessed a sharp rise in international student numbers, indicating emerging hubs for international education. Punjab experienced a 300% increase from 1,397 students in 2012-13 to 5,847 in 2021-22 with enhanced outreach and better alignment of courses with international demand. Uttar Pradesh, Andhra Pradesh and Gujarat also recorded strong growth in enrolments, reflecting a wider dispersion of international students across India. Traditional destinations like Delhi and Maharashtra have a relatively stable overall presence.

States like Odisha and Haryana notably emerged as new and important destinations by 2021-22, pointing to the growing role of State-level higher education policies and institutional development in attracting international students. Despite the presence of top HEIs in Kolkata and

Hyderabad, West Bengal and Telangana have dropped out of the top 10 States for international student enrolment between 2012-13 and 2021-22, indicating shifting regional dynamics.

3.3.1.3 Inbound International Student Trends: Analysis by Level & Stream

An analysis of international student preferences by academic levels and streams offers valuable insights into how global learners are navigating choices in higher education, showing both continuity and transformation in enrolment patterns. Emerging shifts in stream preferences could be understood by examining enrolment patterns across levels such as PhD, M.Phil. Undergraduate and Postgraduate, Diploma and PG Diploma, Certificate and Integrated in disciplines such as engineering, business, health sciences, social sciences and humanities amongst others.

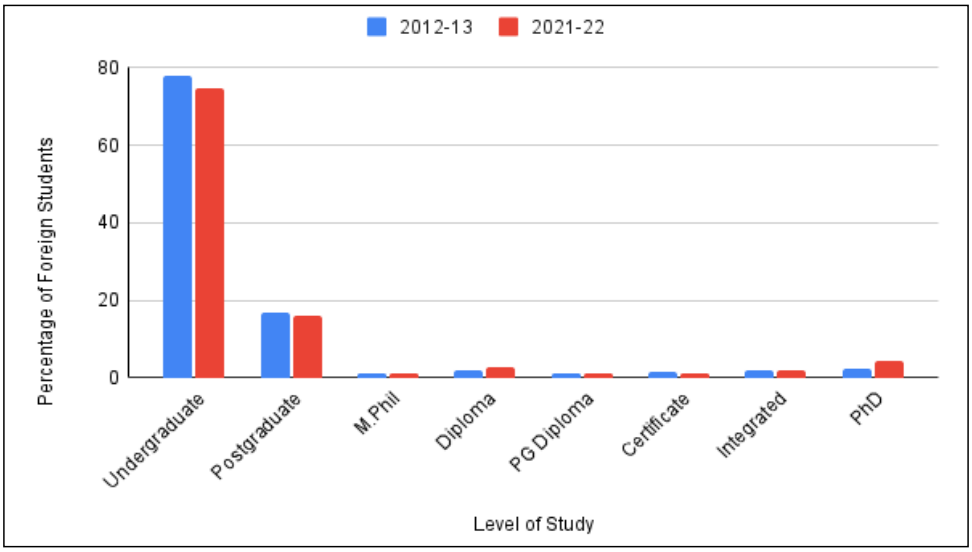


Figure 3.8: Enrolment of International Students across Levels (2012-13 to 2021-22)

Source: AISHE Report (2012-13, 2021-22)

Figure 3.8 shows international student enrolments across levels such as PhD, M.Phil., Undergraduate and Postgraduate, Diploma and PG Diploma, Certificate and Integrated courses in the years 2012-13 and 2021-22. It is observed that the undergraduate programmes have attracted the highest number of international students over the past decade. According to AISHE Report 2021-22, there are 13 programmes with 1,000+ enrolment of which the highest number of students are enrolled in Bachelor of Technology (11,461), followed by Bachelor of Business Administration (3,346) and Bachelor of Science (3,289) programmes.

Table 3.8 Inbound Students to India: By Stream (2012-13 to 2021-22)

Year	B.Tech	BBA	B.Sc.	B.E.	PhD	B.Pharm	B.Com	B.A.	MBA	BCA	MBBS	Others
2012-13	2,733	1,668	1,849	1,591	832	2,625	2,157	2,623	1,056	2,010	2,289	13,341
2013-14	4,132	2,120	2,204	1,864	917	2,583	2,318	2,244	1,020	2,216	2,734	11,209
2014-15	4,478	2,803	2,623	1,881	1,142	2,683	2,598	3,450	1,270	2,227	2,357	14,362
2015-16	5,941	3,228	2,913	2,332	1,139	2,762	2,776	3,113	1,445	2,478	2,164	15,124
2016-17	6,818	4,192	3,152	2,453	1,482	2,526	2,691	2,758	1,439	2,262	1,853	15,335
2017-18	7,610	35,89	3,002	2,490	1,493	2,629	1,992	26,59	1,330	2,667	1,719	13,886
2018-19	8,861	3,354	3,320	2,576	1,560	2,498	1,734	2,226	1,574	1,873	1,429	14,098
2019-20	9,503	3,290	3,964	2,596	1,614	2,451	1,928	2,295	1,707	1,820	1779	13,620
2020-21	11,245	3,314	3,439	2,541	1,444	2,021	2,605	1,817	2,099	1,918	944	12,661
2021-22	11,461	3,346	3,289	2,978	2,012	1,954	1,935	1,798	1,717	1,517	840	12,840

Source: AISHE Report 2012-13 to 2021-2022[13]

Note: The data reflects stock figures over the specified time period.

[13] AISHE Report (2013-14 to 2021-22). https://aishe.gov.in/aishe-final-report/

Table 3.8 displays notable shifts in the academic preferences (by stream) of international students coming to India between 2012-13 and 2021-22. Programmes like B.Tech, B. Pharma, B.A. and MBBS were the most popular in 2012-13, with B.Tech enrolments rising over 4x from 2,733 in 2012–13 to 11,461 in 2021–22. This strong performance reflects India's reputation for cost-effective, English-medium technical education. The sharp growth of B.Tech suggests a broader market preference for specific institutions or formats of engineering education.

Business and Management programmes such as BBA and MBA experienced steady and moderate growth. BBA enrolments grew from 1,668 to 3,346 and MBA numbers rose from 1,056 to 1,717 over the decade, reflecting growing interest in industry-oriented and globally transferable managerial skills. Science and humanities disciplines such as B.Sc. and B.A. maintained consistent appeal, though their numbers fluctuated year to year. Interestingly, MBBS enrolments declined from 2,289 in 2012–13 to just 840 in 2021–22 due to regulatory hurdles and rising competition from other destination countries.

The data also highlights a gradual rise in interest in applied and vocational disciplines such as B.Pharm., BCA, and PhD programmes. While absolute numbers in these streams remain modest, their stability suggests a broadening of India's appeal beyond traditional STEM fields. Additionally, the large and fluctuating 'Others' category ranging from 11,209 to over 15,000 students across the years points to a growing number of students opting for diploma, certificate or non-conventional courses. This evolving trend indicates that while Engineering remains a cornerstone of India's inbound education market, international students are increasingly drawn to a more diverse array of academic opportunities aligned with global employment trends.

3.3.2 Outbound Mobility of Students from India: A Decadal Analysis

The outbound mobility of Indian students has shown a sharp and sustained upward trend over the past decade, reflecting India's transformation into the world's largest source of international students. This analysis seeks to understand the dynamics behind this surge in outbound mobility, including shifts in destination countries and emerging patterns such as preference for specific programmes, institutions and geographies.

Table 3.9: Outbound Mobility of Students from India (2016-2024)

Academic Year	No of Outbound Students	% Change (YoY) in Outbound Mobility[14]
2016	6,84,823	-
2017	8,06,326	17.74
2018	6,20,156	-23.08
2019	6,75,541	8.93
2020	6,85,097	1.41
2021	11,58,702	69.09
2022	9,07,404	-21.72
2023	13,18,955	45.35
2024	13,35,878	1.28

Source: Ministry of External Affairs[15]; data.gov.in[16]

Note: The data reflects stock figures over the specified time period.

[14] Calculation: Percentage change in Outbound Mobility = [(n1 - n2) ÷ n2] × 100 where n1 = no of outbound students in present year and n2 = no of outbound students in previous year

[15] Ministry of External Affairs. (2024, August 1). Parliament question response RS-1194. https://www.mea.gov.in/Images/CPV/RS-1194-01-08-2024-en.pdf

[16] Ministry of External Affairs, Bureau of Immigration. (n.d.). Data.gov.in. https://www.data.gov.in/search?title=abroad&type=resources&sortby=_score

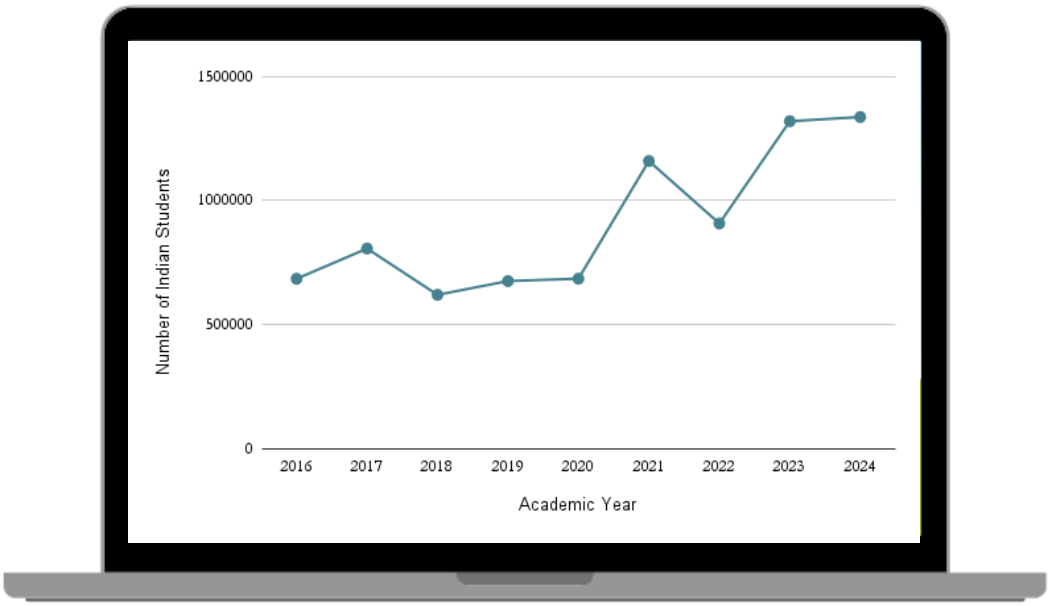


Figure 3.9: Outbound Mobility of Students from India (2016-2024)

Table 3.9 provides year-wise data of the number of Indian students pursuing education abroad from 2016 to 2024, along with the corresponding percentage change (YoY) in outbound mobility. In 2016, 6,84,823 Indian students went abroad. This number increased significantly in 2017 to 8,06,326, marking a 17.74% rise. However, 2018 recorded a sharp decline to 6,20,156 students, a 23.08% decrease from 2017. The count recovered modestly in 2019 to 6,75,541 students, up by 8.93% and edged up again in 2020 to 6,85,097, a marginal rise of 1.41%. The most dramatic shift came in 2021, with a jump to 11,58,702 students, translating to a 69.09% surge likely driven by post-pandemic reopening. However, 2022 experienced a significant dip to 9,07,404. This was followed by a strong recovery in 2023, which recorded 13,18,955 outbound students, an increase of 45.35%. In 2024, the number increased to 13,35,878, suggesting a potential plateau or stabilization after years of volatility. The outbound student mobility from India recorded a compounded annual growth rate (CAGR) of 8.84% between 2016 and 2024.[17]

3.3.2.1 Outbound International Student Trends: Top 10 Study Destinations of Indian students

There has been a significant transformation in the landscape of international higher education for Indian students over the past decade. With globalization and increasing aspirations for quality higher education, the number of Indian students pursuing studies abroad has surged. A comparison of data from 2014 and 2024 illustrates a dramatic shift not just in volume but also in preferred study destinations.

Table 3.10: Top 10 Study Destinations of Indian Students (2016-2024)

Year	2016		2020		2024	
Rank	Host Country	No. of Indian Students	Host Country	No. of Indian Students	Host Country	No. of Indian Students
1	USA	4,23,863	Canada	1,79,480	Canada	4,27,000
2	Canada	94,240	USA	1,67,582	USA	3,37,630
3	Australia	78,103	Australia	1,15,137	UK	1,85,000
4	UK	16,559	UK	90,300	Australia	1,22,202
5	Ukraine	10,963	Germany	35,147	Germany	42,997
6	Germany	10,820	Ukraine	18,429	UAE	25,000
7	Philippines	8,500	Russia	14,370	Russia	24,940

[17] Calculation of CAGR: Percentage change in Outbound Mobility = (E/B)^(1/N)-1 where E = ending year value, B = beginning year value and N = no of years

Year	2016		2020		2024	
Rank	Host Country	No. of Indian Students	Host Country	No. of Indian Students	Host Country	No. of Indian Students
8	Russia	6,903	Philippines	13,227	Kyrgyzstan	16,500
9	France	3,291	Georgia	5,992	Georgia	16,093
10	Georgia	3,000	Italy	4,634	Philippines	9,665

Source: Ministry of External Affairs[18]; data.gov.in[19]

Note: The data reflects stock figures over the specified time period.

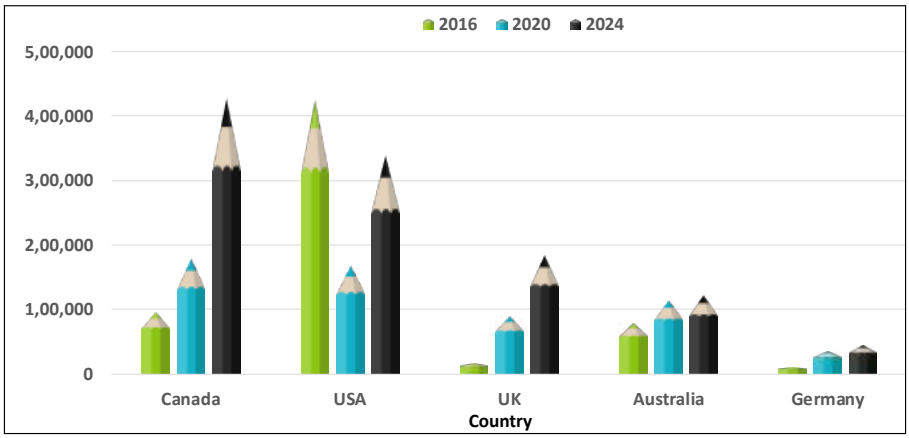


Figure 3.10: Top 5 Study Destinations of Indian students (2016-2024)

Table 3.10 presents data on the top study destinations for Indian students from 2016 to 2024 revealing trends that reflect changing geopolitical dynamics, immigration policies and students' evolving priorities regarding affordability, post-study work opportunities and quality of education. USA consistently remained a top destination, leading with 4.24 lakh Indian students in 2016, 1.68 lakh in 2020 and 3.38 lakh in 2024. Canada showed a remarkable increase of 350% in popularity, climbing from 94,240 students in 2016 to top position in both 2020 and 2024, hosting 1.79 lakh and 4.27 lakh students respectively. Australia held third place in both 2016 with 78,103 students and 2020 with 1.15 lakh students, but slipped to fourth despite a modest increase to 1.22 lakh students in 2024. The UK witnessed a dramatic rise in Indian student numbers, growing from just 16,559 in 2016 to 90,300 in 2020 and further to 1.85 lakh by 2024. This significant upward trajectory indicates renewed interest possibly due to changes in visa policies and the introduction of post-study work opportunities. Germany has also experienced consistent growth with 10,820 students in 2016 to 35,147 students in 2020, reaching 42,997 by 2024.

Beyond the top five destinations, other countries such as UAE, Russia, Georgia, Philippines, Ukraine and Kyrgyzstan have consistently featured among the top choices for Indian students, though at significantly lower volumes. These trends suggest a diversification in the choice of study destinations among Indian students, with a growing preference for countries offering affordable education, particularly in medicine and technical fields. While these countries do not yet rival the major Anglophone destinations in scale, they are increasingly catering to niche demands and specific academic interests.

UAE presents an interesting case, overtaking Canada in 2021 to be at the top with 3.25 lakh students. However, the number decreased to 25,000 in 2024, indicating that its attractiveness may have been temporary and more linked to pandemic-era travel restrictions and regional preferences than to long-term academic factors.

[18] Ministry of External Affairs. (2024, August 1). Parliament question response RS-1194. https://www.mea.gov.in/Images/CPV/RS-1194-01-08-2024-en.pdf

[19] Ministry of External Affairs, Bureau of Immigration. (n.d.). Data.gov.in. https://www.data.gov.in search?title=abroad&type=resources&sortby=_score

3.3.2.2 Outbound Indian Student Trends: State-wise Overview

India has long been a major source of international students, with lakhs of students seeking higher education opportunities abroad. A state-wise analysis of outbound student mobility offers valuable insights into regional trends, priorities and socio-economic factors driving international education.

Table 3.11: Top 10 Source States of Indian Students Going Abroad (2016–2020)

Year	2016		2018		2020	
Rank	State	No of Students	State	No of Students	State	No of students
1	AP	46,818	AP	62,771	AP	35,614
2	Maharashtra	45,560	Punjab	60,331	Punjab	33,412
3	Punjab	36,743	Maharashtra	58,850	Maharashtra	29,079
4	Tamil Nadu	27,518	Gujarat	41,413	Gujarat	23,156
5	Delhi	27,016	Tamil Nadu	38,983	Delhi	18,482
6	Gujarat	24,775	Delhi	35,844	Tamil Nadu	15,564
7	Chandigarh	18,916	Karnataka	26,918	Kerala	15,277
8	Kerala	18,428	Kerala	26,456	Chandigarh	13,988
9	Karnataka	17,719	Chandigarh	26,211	Karnataka	13,699
10	UP	13,776	UP	20,246	UP	8,618

Source: Ministry of External Affairs[20]

Note: The data reflects flow figures over the specified time period as per students' place of issuance of passport.

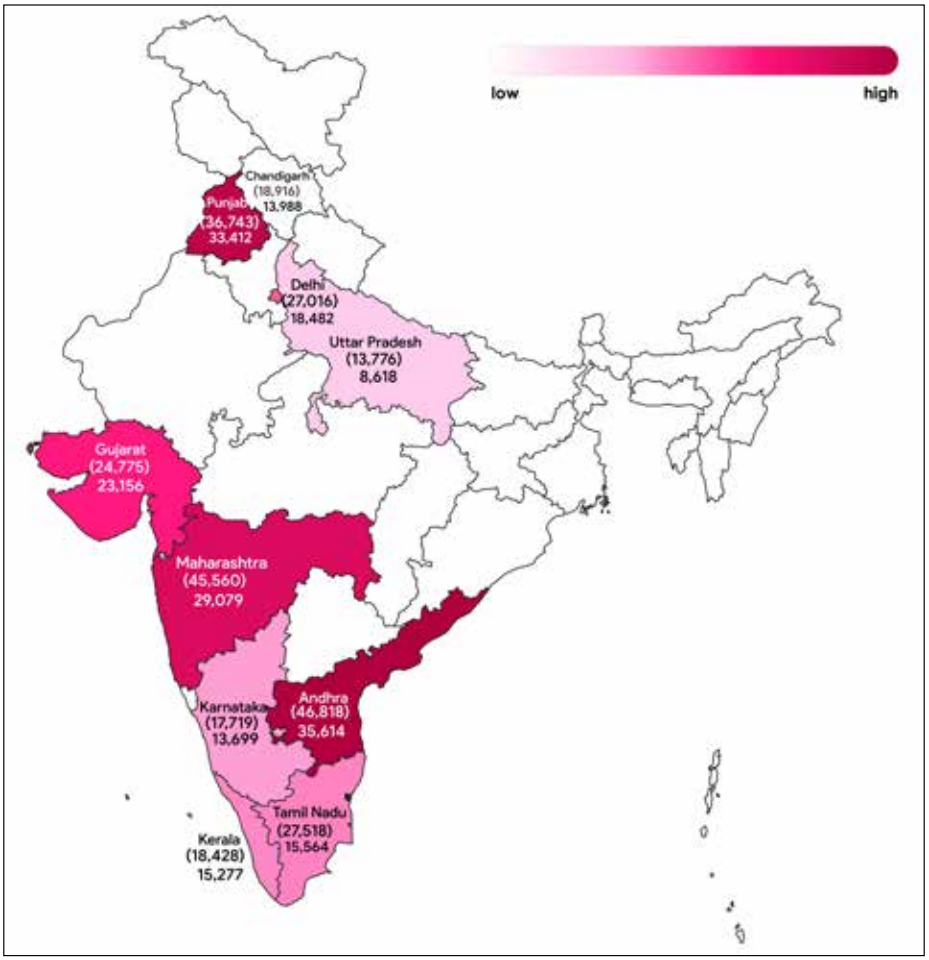


Figure 3.11: Transition in Top 10 Source States for Indian Students Going Abroad (2016-2020)

Note: Bracketed figures refer to 2016; unbracketed to 2020.

[20] Ministry of External Affairs. (n.d.). Lu4709_01 [PDF document]. https://www.mea.gov.in/Images/arebic/lu4709_01.pdf

Table 3.11 presents a State-wise analysis of the top ten Indian States sending students abroad during the years 2016, 2018 and 2020. Andhra Pradesh (AP) consistently emerged as the leading source of outbound students across all three years. The number of students from the State rose from 46,818 in 2016 to 62,771 in 2018, before declining sharply to 35,614 in 2020 likely due to the onset of the pandemic. Punjab followed a similar trajectory, moving from third position in 2016 to second in 2018 and maintaining that position in 2020, though its student numbers dropped from 60,331 in 2018 to 33,412 in 2020. Maharashtra, which was the second-largest contributor in 2016, slipped to third in subsequent years, with its numbers decreasing from 45,560 in 2016 to 29,079 in 2020. Gujarat showed upward mobility, climbing from sixth place in 2016 to fourth in 2018 and 2020. Tamil Nadu and Delhi also remained significant contributors. Southern States such as Karnataka and Kerala featured consistently in the top ten. Uttar Pradesh (UP), while present in all three years, consistently had the lowest numbers among the top ten States and experienced a significant decline from 13,776 students in 2016 to just 8,618 in 2020.

The data reflects both regional concentrations in outbound student numbers dominated by southern and western States and a general decline across all States in 2020, highlighting the disruptive impact of the global pandemic on international student mobility.

3.3.2.3 Outbound Indian Student Trends: Analysis by Stream (2020-21)

An analysis of outbound international student trends by academic stream reveals how students from India are making strategic decisions about their global higher education journeys. Tracking enrolment patterns across disciplines such as Engineering, Business, Health Sciences, Social Sciences and the Humanities between 2018 and 2022 highlights both persistent preferences and evolving aspirations. These trends offer insights into how Indian students respond to global academic opportunities, labour market signals and shifting geopolitical contexts.

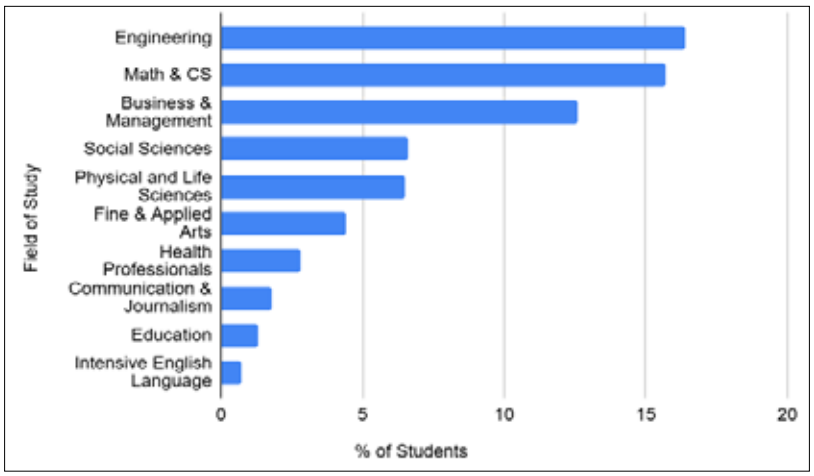


Figure 3.12: Outbound Students from India: By Stream (2021-22)

Source: Oxford International Digital Institute,2021[21]

Figure 3.12 depicts the trend in outbound Indian student enrolment by field of study in 2020-21. It reveals a strong preference for STEM and career-oriented disciplines. Engineering (16.4%), and Math & Computer Science (15.7%) together account for over one-third of students, reflecting India's strong interest in technical education and the global demand for IT and engineering professionals. Business & Management (12.6%) is also a major draw, given the popularity of MBAs and related programmes as pathways to international careers. In contrast, fields like Social Sciences (6.6%), Fine & Applied Arts (4.4%), and Communication & Journalism (1.8%) remain less pursued. Health professions (2.8%) also attract a relatively small share, likely due to high costs, stringent licensing requirements, and sufficient domestic options.

[21] Oxford International Digital Institute. (n.d.). Indian students abroad. https://oidigitalinstitute.com/news/indian-students-abroad/

3.3.3 International Student Mobility: Overall Trend Analysis of India

India's international student mobility trends between 2016 and 2022 reveal an increasingly outward-bound trajectory, with outbound student numbers significantly outpacing inbound flows. This pattern underscores India's growing footprint in global higher education markets while also indicating challenges in attracting international students domestically. Table 3.12 provides insights into annual trends, net outflows and fluctuations in the balance of mobility, reflecting both global disruptions and domestic policy responses.

Table 3.12: International Student Mobility of India (2016-2022)

Year	Inbound (i)	Outbound (o)	i:o Ratio[22]	Net Outflow [23]
2016	45,424	6,84,823	1:15	6,39,399
2017	47,575	8,06,326	1:17	7,58,751
2018	46,144	6,20,156	1:13	5,74,012
2019	47,427	6,75,541	1:14	6,28,114
2020	49,348	6,85,097	1:14	6,35,749
2021	48,035	11,58,702	1:24	11,10,667
2022	46,878	9,07,404	1:19	8,60,526

Source: AISHE Report 2016-17 to 2021-22; Ministry of External Affairs

Note: The data reflects stock figures over the specified time period.

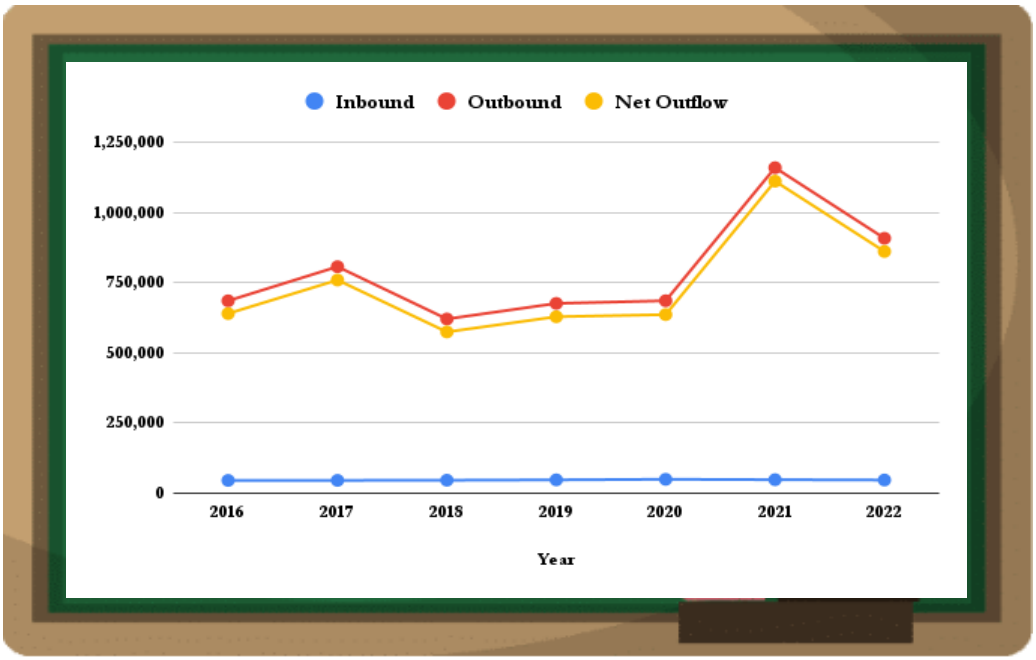


Figure 3.13: International Student Mobility of India (2016-2022)

Figure 3.13 depicts India's international student mobility from 2016 to 2022, revealing a clear divergence between inbound and outbound trends. The number of international students coming into India remained relatively stable from 45,424 in 2016 to 46,878 in 2022, indicating a stagnant growth trajectory in attracting international students. In contrast, the number of Indian students going abroad for higher education displayed significant variation and overall growth from 6.84 lakh in 2016 to 11.58 lakh in 2021. The trend indicates a strong and increasing demand among Indian students for international higher education opportunities.

The imbalance between inbound and outbound mobility is clearly reflected in the i:o ratio. In 2016, for every international student coming to India, 15 Indian students went abroad. This imbalance intensified over time, peaking at a ratio of 1:24 in 2021. Although the ratio slightly narrowed to 1:19 in 2022, it still underlines a significant outflow of students with minimal corresponding

[22] Calculation: Inbound to Outbound Ratio = i ÷ o, where i = inbound mobility of students to India, and o = outbound mobility of students from India in a given year

[23] Calculation: Net Outflow (n) = o-i, where i = inbound mobility of students to India, and o = outbound mobility of students from India in a given year

inflow. The persistent skew in the ratio points to challenges in India's ability to retain and attract international talent. The net outflow of students i.e. difference between outbound and inbound mobility mirrors the trends in the i:o ratio. It increased from approximately 6.39 lakh in 2016 to over 11.10 lakh in 2021, before declining to 8.60 lakh in 2022.

3.3.4 Addressing the Disparity in Student Mobility Ratio in India

The net outflow of students i.e., the difference between inbound and outbound mobility mirrors the trends in the inbound to outbound ratio (i:o) ratio. This sustained high net outflow and i:o ratio over the past decade, highlights a major gap in India's internationalisation strategy, particularly in making its higher education system attractive to international students.

Inflow of international students is a prerequisite for becoming a global knowledge hub, yielding substantial economic and cross-cultural benefits. However, an objective analysis of global data reveals a stark gap between India's aspirations and its current standing. To bridge this gap and provide a data-driven roadmap, two distinct forecasting models have been developed to project inbound international student enrolment for the short-term (2030), medium-term (2035), and long-term (2047). Firstly, the Global Benchmarking Approach which is based on the Aspirational Growth Model using the Compound Annual Growth Rate (CAGR) lens. Secondly, the Internationalisation Intensity Approach which is based on the Strategic Intensity Model using the internalisation intensity lens.

i. Global Benchmarking Approach

The first approach utilises the Compound Annual Growth Rate (CAGR), a standard methodology in economic forecasting and public policy that smoothens periodic volatility to reveal a steady underlying growth trend. Its application is well-established in the international education sector; for instance, the education intelligence unit HolonIQ employed a CAGR to forecast the doubling of the global market to over 8 million students by 2030.[24] This approach provides a quantitative, path-dependent "corridor of possibility" for future enrolment.

This Report applies the CAGR lens in two distinct ways to define this corridor:

- **A Conservative Lower Bound:** By projecting India's own historical CAGR of 7.71% in attracting international students, a conservative "business-as-usual" forecast is established. This represents a realistic baseline achievable if past momentum is maintained.
- **An Aspirational Upper Bound:** To define an aspirational yet achievable target, the framework benchmarks against the historical CAGR of Canada (13.53%) from a period when its international student population was at a comparable absolute level to India's today. Canada's subsequent success, driven by a deliberate national strategy, offers an empirically validated model of the growth velocity possible when a nation commits to a coordinated, whole-of-government approach to internationalisation.

The projected range for international student enrolment under this model assuming lower bounds as a continuation of India's historical CAGR of 7.71% and the upper bound as the benchmark 13.53%, is as follows:

Year	Lower Bound Target	Upper Bound Target
2030	84,907	1,29,397
2035	1,23,077	2,44,073
2047	3,00,013	11,19,314

This approach is motivated using global benchmarking standards whereas the next approach is more proactive and policy-driven.

ii. Internationalisation Intensity Approach

[24] Refer to https://www.holoniq.com/notes/196b-international-education-market-set-to-reach-433b-by-2030-7-4-cagr. Date accessed: 19 October 2025.

Complementing the growth-rate projections, the second approach sets policy targets based on internalisation intensity as a percentage of India's total higher education enrolment. This shifts the strategic focus from "how fast can we grow?" to "where do we want to stand on the world stage?" and utilizes the concept of "internationalisation intensity"—the percentage of international students within the total higher education population. This metric is a globally recognised standard, used by organisations like the OECD,[25] to measure a nation's integration into the global education landscape and the competitiveness of its higher education system. The approach is proactive and designed to align with the NEP goal of achieving a 50% GER by 2035, based on the youth population estimates (18-23 years) from the UN Population Prospects 2024 Report. The key assumption here is that the GER target is achieved in a linear and phased manner.[26]

The proposed intensity targets and the corresponding number of international students are given below:

Year	Internationalisation Intensity	Target International Students
2030	0.25%	1,55,514
2035	0.50%	3,59,254
2047	1.0%	7,89,037

To align with global standards, a phased increase in India's internationalisation intensity is proposed. The targets are to elevate the current rate of 0.1% to 0.25% by 2030, 0.50% by 2035, and ultimately 1.0% by 2047. These objectives are conservative when compared to international standards, yet achieving 1% intensity in a system of India's scale would translate into over 8 lakh international students, firmly establishing the nation as a leading global destination for higher education. Currently, the average intensity of the top 10 host countries is 17.9%, whereas that of other Asian nations such as South Korea and Japan are 7% and 4% respectively.

The two approaches provide a clear, data-backed range of targets for elevating India's global academic standing. Achieving these targets aiming for at least 1,50,000 international students in Indian HEIs by 2030 and scaling to 8,00,000 internationalisation students in Indian HEIs by 2047 is desirable and will require a dedicated and coordinated implementation strategy.

3.3.4.1 India's Flagship Inbound Mobility Initiative: Study in India

The Study in India (SII) programme launched in 2018 by the Ministry of Education is an initiative to strengthen India's inbound student mobility and make India a global study destination. SII positions Indian HEIs as attractive alternatives to traditional study-abroad destinations, particularly for students from the Global South. It aligns with NEP 2020's vision of internationalising Indian higher education with the goal of projecting India as an accessible, diverse and affordable global education hub.

Core Objectives:

- Increasing international student enrolment, with ambitious milestones of 2,00,000 students by 2023 and 5,00,000 by 2047.
- Utilising surplus capacity in Indian HEIs by reserving 10-15% supernumerary seats for foreign students in participating HEIs without displacing domestic candidates.
- Enhancing India's global academic brand by promoting the country's educational heritage, cultural vibrancy, and expanding higher education ecosystem.
- Improving global competitiveness by internationalising Indian campuses and facilitating cross-border academic exchange.

[25] Refer to https://www.oecd.org/en/data/indicators/international-student-mobility.html

[26] This translates into a GER of 42% in 2030 and the aspirational GER of 60% in 2047.

- Simplifying admissions and support through a centralised digital portal, application tracking, scholarship access and visa guidance.

Strategic Mechanisms:

- **Centralised Online Platform:** Designed as a one-stop solution, this portal offers institution listings, course directories, scholarship information, application processes, and visa guidance.
- **Academic Quality Standards:** Institutions onboarded to the portal must be NAAC-accredited or ranked in the NIRF, ensuring a baseline of academic credibility.
- **Institutional Incentives:** Participating HEIs are encouraged to allocate supernumerary seats and receive performance-based recognition for enrolling international students.
- **Scholarship Framework:** The programme offers tiered fee waivers 100%, 50%, and 25% based on merit, tied to institutional ranking and disciplinary strength.
- **Marketing and Branding Campaigns:** India has hosted education fairs and launched digital campaigns across Africa, Southeast Asia, and Central Asia, in collaboration with Indian embassies and select EdTech partners.
- **Student Support Infrastructure:** Pre-arrival orientation, helpline services, and limited post-arrival support have been introduced to assist international students in navigating Indian institutions and society.

Despite its strong policy backing and strategic initiatives, SII has not achieved its enrolment goals. With just over 46,000 international students currently in India, it is far short of the identified target of 2,00,000 inbound students by 2023, the initiative presents an instructive case of how good intentions need to be supported by systemic readiness and strategic execution.

3.3.4.2 Barriers to Inbound Mobility of Students

Drawing on the survey insights and policy analyses, several structural and systemic barriers continue to hinder India's ability to attract and retain international students:

- **Infrastructure and Ecosystem Gaps:** International students expect globally benchmarked campus facilities, housing, safety measures and support services. Fewer than 15% of Indian HEIs meet these expectations. Even basic needs such as visa support, grievance redressal, and access to banking remain underdeveloped.
- **Visa and Regulatory Bottlenecks:** Complex visa procedures, coupled with average processing time, act as significant deterrents to prospective international students. Students face documentation issues, unresponsive embassies and unclear guidance. The lack of a fast-track academic visa category undermines India's appeal.
- **Insufficient Student Support Ecosystems:** Fewer than 10% of surveyed HEIs provide comprehensive pre-arrival guidance, cultural orientation, or dedicated international student support services.
- **Curricular Inflexibility:** Rigid academic structures, a lack of interdisciplinary offerings, and limited modular or credit-based programmes hinder academic alignment with global trends.
- **Scholarships and Deliver Gaps:** Although scholarships are advertised, students reported unclear eligibility criteria, non-transparent selection, and delays in receiving fee waivers.
- **Weak Global Visibility and Outreach:** Inadequate branding, limited participation in global education fairs and underutilised alumni networks have left Indian HEIs underrepresented in the international education landscape.
- **Weak Strategic and Diplomatic Alignment:** In contrast to global initiatives by countries like Australia (New Colombo Plan), or the UK (Erasmus Model), India has not integrated SII into broader foreign policy, trade negotiations, or regional development strategies.
- **Limited Stakeholder Collaboration:** Public-private partnerships especially in areas such as

international promotion, visa logistics, student onboarding, and infrastructure development – remain underutilised. India has yet to fully leverage the experience of private actors that have led successful campaigns in other contexts.

Hence critical reform in domains such as infrastructure development, curriculum innovation, industry partnerships and research expansion that are linked to short, medium and long-term implementation strategies is vital to increase Inbound Mobility to higher levels.

3.4 CONCLUSION

The global overview of international student mobility shows a 214% increase in the number of mobile students over the last 25 years. The patterns explored in this chapter reflect the evolving aspirations of students, strategic priorities of nations and growing interdependence of the global higher education system.

The internationalisation of higher education has witnessed substantial changes globally and within India over the last two decades. For India, the inbound mobility remains modest while the outbound mobility has surged with India being the world's leading source country for international students. However, the combined trend analysis reveals a consistent imbalance between inbound and outbound mobility, highlighting the need for a more balanced and strategic internationalisation approach at the systemic and institutional levels.