



WHITE BRIDGE  
EDUCATION

# Evolving Trends in Indian Student Mobility

Impact of Recent Shifts and  
the Global Geopolitical Climate



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# INTRODUCTION

Indian student mobility has undergone remarkable transformation over the past few decades, emerging as a global trend driven by growing aspirations for higher education, economic growth, and expanding international opportunities. In the last five years, factors such as COVID-19 pandemic period, post pandemic changes, changing geopolitical landscapes, changing education landscape within India and evolving educational policies have further shaped the dynamics of Indian students studying abroad.

India remains one of the largest sources of international students. As per the data \* published by Ministry of External Affairs in January 2024 there are over 1.33 million Indians pursuing education abroad in. This figure has grown steadily from 660,000 in 2000, reflecting an average annual growth rate of 10%. Top destinations include the United States, Canada, Australia, the United Kingdom, and European nations like Germany and the Netherlands. The UAE is among the top 10 preferred destinations for Indian students pursuing higher education \*\*

The United States continues to lead as the most favored destination, hosting over 253,000 Indian students on active visas. In 2023, the U.S. processed over 1.2 million visas for Indian nationals, surpassing its target by 20%, highlighting both its recovery and India's importance as a talent pool. Post-Brexit, the UK has also seen a significant surge in Indian enrollments, growing at 10% annually and solidifying its position as a leading destination.

Canada and Australia had emerged as strong contenders, attracting Indian students with favorable immigration policies and work opportunities in the year 2022. Two years back Canada reported that Indian students accounted for more than 35% of all study permit holders. Similarly, Australia saw Indian students form over 20% of its international student population, particularly in fields like engineering, business, and IT.

The COVID-19 pandemic briefly disrupted mobility, prompting a shift toward virtual learning. However, with the reopening of borders and a return to physical campuses, demand for in-person education has rebounded sharply.

This report will be published in two parts. Part I delves into the evolving landscape of Indian student mobility, analyzing key trends and global events. It highlights the drivers of mobility, challenges faced by students, and the emerging destinations reshaping the global education ecosystem.



# Summary of the Key Shifts in International study destinations

Indian student mobility has experienced significant changes since 2022, driven by evolving geopolitical dynamics, international education policies, changing reforms in the Indian higher education system and economic trends.

The United States and the United Kingdom continued to dominate as key destinations for Indian students, with Australia and Canada witnessing a notable surge in enrolments in year 2023. However, the trend in 2024 changed due to several reasons.

Australian government efforts to control net migration resulted in student visas to drop by 28%. The Australian government proposed capping international student enrolments at 270,000 for 2025 to control migration levels.

Canadian government also implemented measures by introducing a federal cap to reduce study permit for international students. Canada and India were faced with challenges in its diplomatic, impacting bilateral cooperation in education.

In the United States, Indian students represent over 25% of the 1 million international students, solidifying their position as a critical demographic. As of 2023, the U.S. hosts 253,631 Indian students, nearly equalling the number of Chinese students. According to the IIE Spring 2023 report, U.S. institutions are increasingly prioritizing India as a recruitment market. The U.S. government surpassed its goal of processing one million Indian visas by nearly 20% compared to 2019, with Indian students now accounting for 57% of undergraduate and 77% of graduate enrolments.

As per the data published by HESA (Higher Education Statistics Agency), for 2022-23 Academic year 173, 190 Indian students enrolled at UK institutions, indicating a 39% increase compared to previous year and surpassing students from China. However, this was short lived as the UK government added visa restrictions in bringing dependents on student visa resulting in a 23% decline in the number of Indian students coming to the UK for higher studies, as per Home Office statistics for the year ending June 2024.

New destinations like South Korea, Germany and other EU nations are gaining traction among Indian students, supported by scholarships fostering global academic cooperation. The updated DAAD dataset highlights India's significant contribution to Germany's academic community, with approximately 49,000 students and 6,700 researchers at German universities. Notably, 80% of international researchers, including 4,000 professors, are based at universities, while 20% work at non-university research institutions. India leads in researcher numbers (6,700), followed by China (5,900) and Italy (5,800).

New Zealand is slowly also regaining its market share from India and the government in NZ has announced that international students pursuing a 30-week postgraduate diploma and subsequently transitioning directly to a master's degree are now eligible for a Post-Study Work (PSW) visa. Ireland has witnessed a 28 per cent increase in Indian student enrolments compared to 2023.

In Summary Indian students continue to account for a substantial share of international students across the four traditionally popular countries due to favourable immigration policies.

## India's global outlook

The World Bank's \$255.5 million loan for India to enhance technical education is expected to benefit 350,000 students annually, further fuelling outbound mobility. India's role in global international student mobility (ISM) remains pivotal as a leading source country for international students. However, as a host country, India remains semi-peripheral compared to Western nations. Despite this, ISM researchers identify India as an emerging Asian regional education hub.

Under India's G20 presidency in 2023, these developments highlight its growing influence in global education. Over the past two years, Indian student mobility has adapted to the impacts of the COVID-19 pandemic, shifting geopolitical landscapes, and evolving academic trends, reflecting a dynamic and increasingly globalized outlook.

# Geopolitical Dynamics and Its Impact

The dynamics and preferences of Indian students in choosing their study destinations are influenced by both global and domestic factors. India is currently undergoing significant changes in education reforms and financial capabilities. Part I of the report explores these global and domestic influences in detail.



## Impact of US-China Tensions

Escalating geopolitical tensions between the US and China have reshaped student mobility trends, with many Chinese students exploring alternatives to the US. This shift has benefitted Indian students, who now constitute a growing presence in STEM and business programs. The relaxation of H-1B visa restrictions has further boosted the appeal of US institutions by enhancing post-graduation opportunities for Indian graduates.



## UK's Post-Brexit Resurgence

Following Brexit, the UK has seen a sharp rise in Indian student enrollments, bolstered by the introduction of the two-year post-study work visa in 2020. Despite initial uncertainties, the UK's student-friendly policies and career prospects have cemented its appeal as a leading destination for Indian students.



## Emerging European Destinations

Countries like Germany, France, and the Netherlands are gaining traction among Indian students due to affordable, high-quality education, particularly in engineering, science, and technology fields. Policies such as Germany's no-tuition-fee model and the EU's focus on attracting skilled talent have made these nations increasingly attractive for Indian students.



## Disruption in Eastern Europe

The war in Ukraine has disrupted the mobility of Indian students in that region, particularly in countries like Russia and Ukraine. Prior to the conflict, thousands of Indian students pursued medical degrees in Ukraine, but the war forced many to evacuate. As a result, Indian students are now seeking alternative destinations, often leading to an increased interest in countries like Poland, Czech Republic, and even newer destinations like Armenia or Uzbekistan, where universities offer similar programs.



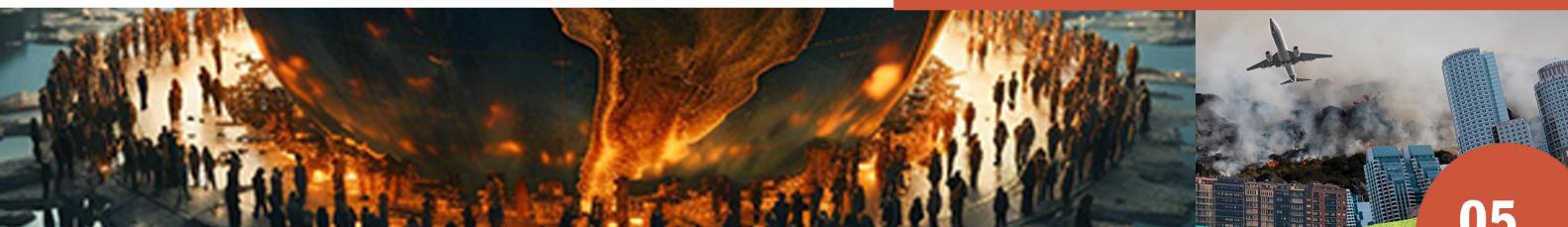
## Student Security Concerns

The conflict in Eastern Europe heightened concerns about student safety, which, in turn, impacted the preferences of Indian students. Many are now more cautious when considering destinations in politically unstable regions.



## Impact of the Russia-Ukraine War

The Russian invasion of Ukraine in 2022 intensified the crisis, significantly affecting international students and their educational pursuits. Indian medical students studying in Ukraine have been among the hardest hit by the ongoing conflict. Approximately 19,000 Indian students were forced to return home and are now exploring options to complete their education. Estimates suggest that around 2,000 of these students have returned to Ukraine, primarily relocating to the relatively safer western regions of the country. Students interested in medical education started scouting options to manage their expectations and financial affordability.



# Immigration and Work Opportunities



According to a representative of Redseer, 2022 was one of the best years for the ‘Big 4’ destinations (the US, the UK, Australia, and Canada) but 2024 will be the year for alternative destinations like Germany, Ireland, the Netherlands, Singapore, and South Korea, etc. Additionally, they are also giving way to countries like Finland, Austria, Spain, the UAE, Malaysia, and Japan.

A Big reason behind this shift is the immigration policy changes brought in by Australia, UK and Canada. Indian students started to look for countries that would provide a higher value for their investment in education. The above emerging study hubs are offering a blend of academic excellence, cultural enrichment, and post-graduation opportunities. These countries present unique value propositions, ranging from robust technological infrastructure to affordable education and accessible work options.

Hence the shift reflects a growing preference for globally diverse education choices tailored to varied interests and career aspirations of Indian students.



# India rising as a preferred destination for Indian parents

Moving to the domestic changes observed in India that has positively impacted the number of students choosing to make India as their choice of further studies.

India's higher education system supports 38 million students across 50,000 institutions, including 1,057 universities. The National Education Policy (NEP) 2020 aims to globalize India's academic landscape, fostering inclusivity and collaboration.

The COVID-19 pandemic reduced the number of Indian students studying abroad to 2.59 lakh in 2020. To address this, the Ministry of Education initiated many positive changes in the National Education Policy and also partnered with Australian universities, enabling Deakin and Wollongong to establish campuses in Gujarat's GIFT City, offering global education within India. Recently University of Southampton has also declared to open a campus in India. The campus, scheduled to open in August 2025, will provide undergraduate and postgraduate degrees equivalent to those awarded in the UK, making it the first UK university to secure a full campus license in India.



## Key NEP 2020 Highlights

**Flexible Curriculum:** Encourages diverse subject exploration.

**Multiple Entry/Exit Points:** Promotes lifelong learning.

**National Research Foundation:** Boosts research and global collaboration.

**Technology Integration:** Enhances access through the National Educational Technology Forum.

**Vocational Education:** Combines practical and general education.

**Industry-Academia Collaboration:** Aligns curricula with market needs.

These initiatives position India as a hub for globally competitive and inclusive education, making it a preferred choice for many parents especially at the Undergraduate level.

Additionally, several Indian institutions have secured positions in global university rankings, encouraging Indian parents to consider India as a viable study destination. Below are some notable institutions and their rankings:

**IISc:** Ranked 251–300 in THE 2025, excelling in teaching, research, and industry engagement.

**IIT Delhi:** Ranked 150 in QS 2025 and 44 in QS Asia.

**IIT Kharagpur:** Ranked 222 in QS 2025

**IIT Madras:** Ranked 227 in QS 2025.

**Anna University, Mahatma Gandhi University, Saveetha Institute, Shoolini University:** Ranked 401–500 in THE 2025

Indian institutions are gaining global recognition, encouraging parents to consider India as a study destination.

# Global Economic factors influencing Student Mobility in India



## Rising Affluence in India

The expanding Indian middle class and increasing disposable incomes have enabled more families to afford international education for their children. Coupled with a growing demand for specialized programs and global exposure, this has fuelled the rise in Indian students pursuing studies abroad.



## Cultural Emphasis on Education

Indian families place significant importance on higher education, viewing international degrees as a pathway to better career prospects. Post-pandemic, this trend has accelerated, with parents increasingly prioritizing investments in their children's future by opting for prestigious global institutions.



## Government Expenditure on Education

Government spending on education plays a critical role in improving the infrastructure, quality, and accessibility of educational institutions. For example, countries like Norway and Sweden, which allocate over 6% of their GDP to education, consistently attract international students due to their high-quality systems and well-equipped institutions. Increased funding can also facilitate the development of research facilities and faculty, further enhancing the global reputation of a country's education sector. India, for instance, has steadily increased its education budget, allocating ₹1.12 lakh crore in 2023–24, aiming to boost its global appeal as an education hub.



## Student Scholarship Policies

Scholarship programs are a powerful tool for attracting international students. Countries like Germany and Australia have implemented generous scholarship schemes, such as DAAD (Germany) and Australia Awards, to attract talent worldwide. In India, initiatives like the Study in India program offer scholarships to international students, contributing to a 68% rise in foreign student enrolment over the past five years. These policies not only make education more accessible but also position the host country as a supportive destination for academic pursuits.



## Post-Study Employment

Post-study work opportunities significantly influence students' choice of study destinations. Countries like US and the UK offer attractive post-study work permits, enabling graduates to gain valuable experience and increasing the likelihood of permanent residency. However, the growing number of international graduates staying back can lead to heightened competition for employment sponsorships. For instance, in 2022, Canada welcomed over 800,000 international students, with many vying for jobs under its Post-Graduation Work Permit Program (PGWPP). This underscores the need for balanced policies to ensure opportunities remain accessible for both domestic and international graduates.



# Technology and EdTech's Impact on Student Mobility

## Hybrid Education Models

The rise of hybrid and online education programs has significantly influenced student mobility. While some students continue to prefer studying abroad for a comprehensive experience, others are opting for blended learning opportunities that offer greater flexibility. The growing demand for a global classroom experience, combined with online learning options, allows Indian students to access top professors and institutions worldwide without the need to relocate.

## EdTech Boom

Indian students are increasingly engaging in global online certification programs and micro-degrees from prestigious international universities such as MIT, Harvard, and Stanford. This trend has been further accelerated by the global expansion of EdTech platforms, which provide cost-effective alternatives to traditional international study programs.

## India's EdTech revolution

is reshaping the education landscape through digital innovation, offering scalable, accessible, and personalized learning solutions. The rapid adoption of technology in education has made quality learning available to students across the country, especially in remote areas. With advancements like AI, AR, and VR, EdTech platforms are providing interactive, engaging, and customized educational experiences. This digital transformation is empowering both students and educators, improving learning outcomes, and fostering skills that are crucial for the future workforce.

India's educational reforms, driven by technological innovation and strategic government policies, are not only enhancing the domestic learning environment but also preparing students for global opportunities. As the country modernizes its education sector, it is positioning its students to thrive in international academic settings, fostering a future-ready workforce equipped for global challenges.

# Cultural Factors and Student Preferences



## Subject and course preferences

Post covid there has been a major change in the subject and course preferences of Indian students. The post covid era has provided a lot of opportunity to Indian students and parents to think of unconventional courses. Students are increasingly drawn to a broad range of academic fields, from advanced topics like AI ethics and machine learning to specialized areas such as kinesiology and gerontology. This growing intellectual curiosity is reflected in their choice of study locations, with many opting for tech-driven universities in the US or sustainability-focused institutions in Germany and the Netherlands. Undergraduates are pursuing courses driven by personal passion, while also gaining valuable workplace skills like crisis management, critical thinking, and teamwork. Additionally, creative disciplines are seeing a surge in interest.



## Affordability

The financial aspect is paramount, with Indian students spending nearly \$50 billion on studying abroad in 2022. This figure is projected to reach \$70 billion by 2025, indicating a significant investment in international education. Students do look for scholarship opportunities from the perspective of seeking financial support and as a matter of academic pride.



## Safety

Safety continues to remain a top priority, as students and their families prefer destinations known for stable political climates, low crime rates, and supportive communities for international students. For instance, the United States recorded 211,930 Indian students as of 2022, reflecting its appeal despite global safety concerns.



## Career opportunities

Career prospects are a significant consideration, with Indian students aiming to study in countries that offer strong job markets and post-graduation work visas. The United States, for example, has been a top choice, with 69% of Indian students opting for higher education there, seeking better career opportunities.



## Skill based degrees

There is a growing preference for skill-based education, with 70% of learners preparing for overseas education opting for specialized or skill-based courses. This trend highlights the demand for practical, job-ready skills that enhance employability. With India also progressing towards careers and skill-based courses, this aspect is becoming increasingly important for Indian students and parents.



# Future Trends in Indian student mobility



## Projections for Indian Student Numbers in Key Destinations

As one of the largest sources of international students, India's outbound student numbers are expected to grow significantly. The Indian Ministry of External Affairs projects the number of Indian students abroad to reach 2 million by 2025, driven by rising affluence, demand for specialized courses, and a desire for global exposure.

The traditional study abroad countries will continue to gain the market share from India. The avenues for other non-traditional markets will also increase because of the positive messaging from the respective governments on post-study opportunities, overall costs and simplified visa processes.



## United States

The US continues to be the leading destination for Indian students. According to the Institute of International Education (IIE), over 253,000 Indian students were in the US during the 2022-2023 academic year, making India the second-largest source of international students. This number is expected to rise, with a projected 10% annual growth, particularly in STEM and business programs.



## United Kingdom

The UK has become an increasingly popular choice for Indian students, especially since the introduction of the post-study work visa in 2020. The number of Indian students has grown at an annual rate of about 10%, representing over 20% of the total international student population in the UK by 2022. India is expected to surpass China in student numbers in the UK in the near future.



## Canada and Australia

Canada remains a key destination for Indian students despite changes in the immigration policies and post-graduation work opportunities. Indian students represented 35% of all international students in Canada in 2022. Similarly, Australia continued to attract significant numbers of Indian students, who make up more than 20% of its international student population.

# Emerging Destinations and New Opportunities:

While traditional destinations like the US, UK, Canada, and Australia remain dominant, there is a growing shift towards emerging study destinations offering high-quality education at lower costs or unique opportunities. Several European countries and new regions are gaining popularity among Indian students.



## Germany

Known for its excellent education in engineering, technology, and research, Germany has become a top destination, especially for students seeking low-cost or tuition-free education. In **2022**, Indian students made up about **20%** of all international students in Germany, particularly in engineering and IT fields. Germany's no-tuition-fee policy in public universities continues to attract Indian students, with this trend expected to grow as more students seek affordable European education options.



## The Netherlands

The Netherlands is increasingly favored by Indian students, particularly in business administration, data science, and engineering. In **2023**, approximately **10,000** Indian students were enrolled in the country, with consistent year-on-year growth. The country's English-taught programs and post-graduation work opportunities are major attractions, and the number of Indian students is projected to rise by **8-10%** annually.



## Other Emerging Destinations

Countries like South Korea, Singapore, and the UAE are also seeing an uptick in Indian student enrollments. Singapore, in particular, has experienced a surge in Indian students pursuing management and IT courses, with Indian students representing **40%** of the international student body. South Korea's top universities, offering competitive programs in technology and business, are attracting more Indian students as well.

# Conclusion

Indian student mobility is set for robust growth, fuelled by rising aspirations, favourable policies, and new educational opportunities. Traditional destinations like the U.S., U.K., Canada, and Australia will remain dominant, while emerging nations like Germany, the Netherlands, and South Korea offer exciting possibilities due to their affordability and quality of education and are expected to see increasing numbers of Indian students. Advancements in online learning technologies and evolving work environments are set to redefine how and where Indian students choose to study. The growing demand for flexible learning pathways and specialization in high-demand fields such as AI and data science highlights an increasingly dynamic and global landscape for Indian student mobility in the years to come.



# Research



## Thank You

We trust this report provides valuable insights to enhance your engagement and refine your strategy for impactful outcomes. Should you have any questions or require additional support, please feel free to reach out to our Research & Advisory team.

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