



Globalisation, Mobility & Rankings

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Higher Education Institutions are now globalised, globalising entities. This identity has gradually formed over the last decade, and more precisely, it has marked the reality and millennial identity of Higher Education strategy. Fluidity of borderless movement, equitable trade relations and *internationalisation* have seen universities the world over increasingly transition from a teaching focus to a research-mobility framework.

Economic globalisation, as with university rankings, is an important indicator and prognostic measure for the health of a country, especially its higher education institutions and the trends which they follow – domestic and international. Equating rankings with globalisation indicators – economic globalisation particularly – can provide potential insight into the important trends shaping the global scenario. The relation, however, between the international economy and the political institutions which govern it is historically ambivalent if not paradoxical, and there is always policy to consider: the borderless momentum of globalisation faces territorial policies which at times act as a counterweight. Nowhere more so is this paradox played out than in the higher education scenario, where the need to be global is also faced with foreign policy measures to cap and secure the financial integrity of national services and infrastructure in a time of fiscal, structural (and to an extent) geopolitical reform.

GOING GLOBAL: the rationale

The globalisation of education is reflected in the changes in international student mobility. The rise of international student mobility is associated with an increased demand for technical, specialised, postsecondary education that spurs students to travel and capture educational opportunities abroad. The motivations, as with human psychology itself, are varied, but certainly market forces have played an important role in crafting and shaping the viability, accessibility and consequent attraction of a destination.

As Kofi Annan asserted, *to argue against globalisation is to argue against the laws of gravity*. Fluidity of borderless movement, equitable trade relations and *internationalisation* has seen universities the world over progressively transition from a teaching focus alone, to high-impact research-mobility frameworks, the success of which has either depended on the ability of universities to adapt, as well as to embrace the challenge of sustaining regional market positioning in a time requiring partnerships and mobility pathways.

Advanced economies remain important drivers of world economic activity: North America and Western Europe continue to protect global fiscal integrity in that these regions can leverage capabilities, despite the fact that new investment has slowed amid high energy costs and shorter product life cycles. The eventual question will be whether structural revision within the E.U and slowing investment, will impact upon student mobility, especially since economies in Mexico, Turkey and Vietnam are increasingly attractive for global business (WEF, 2012-2013).

These non-BRICS rapid-growth markets are today considered by the majority of executives to be emerging regions for business and infrastructure, with trade-sympathetic government policies and equitable labor productivity.

Indeed, changes to international student flows are multifaceted and complex, entailing many socio-economic variables. With the consequent growth of new destinations for study reflecting emerging trends, international student mobility has become more centralised and less densely connected. Given these characteristics, mobility shares strong structural similarities with the networks of world trade and most notably, world polity.

According to Robin Shields, as the labor force is globalized, "so is the formation of human capital:

guided by the "invisible hand" of market forces, individual rational actors will gravitate toward educational investments that most efficiently produce desired outcomes, including studying abroad" (Shields, p.612, 2013). Yet whether it be a case of the *invisible hand* of market forces or the winds of scientific change, universities are now faced with the necessity to build international partnerships and establish mobility pathways which carry both knowledge and social impact, which contribute to social growth as well as institutional growth. And as with 'gravity', the situation is sensitive, necessary and a condition of existence.

The link between trade and student mobility is by no means an explicit given, but as Shields further highlights in his telling study, it is the invariably high correlation of "IGO memberships and student flows" which lends support to a "world culture theory", claiming that increased memberships in international organizations is associated with processes of globalisation. The number of common memberships two countries share, furthermore, is "strongly associated with the number of international students moving between them, and changes in the correlation over time indicate that this association is becoming stronger" (Shields, p.625).

In this context, economic globalisation, as with university rankings, is an important indicator and measure through which we are able to ascertain the 'health' of a nation, especially its higher education institutions and the trends evidenced – both domestic and international.

The relation, however, between the international economy and the political institutions which govern it is historically paradoxical and it cannot be denied that this paradox has presented universities with challenges: the momentum of globalisation which is borderless is confronted by territorial policies which can either add to, or reduce, momentum. In this respect, immigration policy can be a firm decider in either student uptake or downturn.

As with trade, freedom of movement and the fluidity of human capital depend upon the particular territorial conditions set out by policy makers. Advances in industrial agreements with emerging countries will not craft immigration policy, but certainly go towards making borders more accessible, and it is not unusual that such agreements, be they nuclear and/or pan-industrial, between nations, can impact upon immigration frameworks.

Comparison number of international students/World Trade Openness (2012)

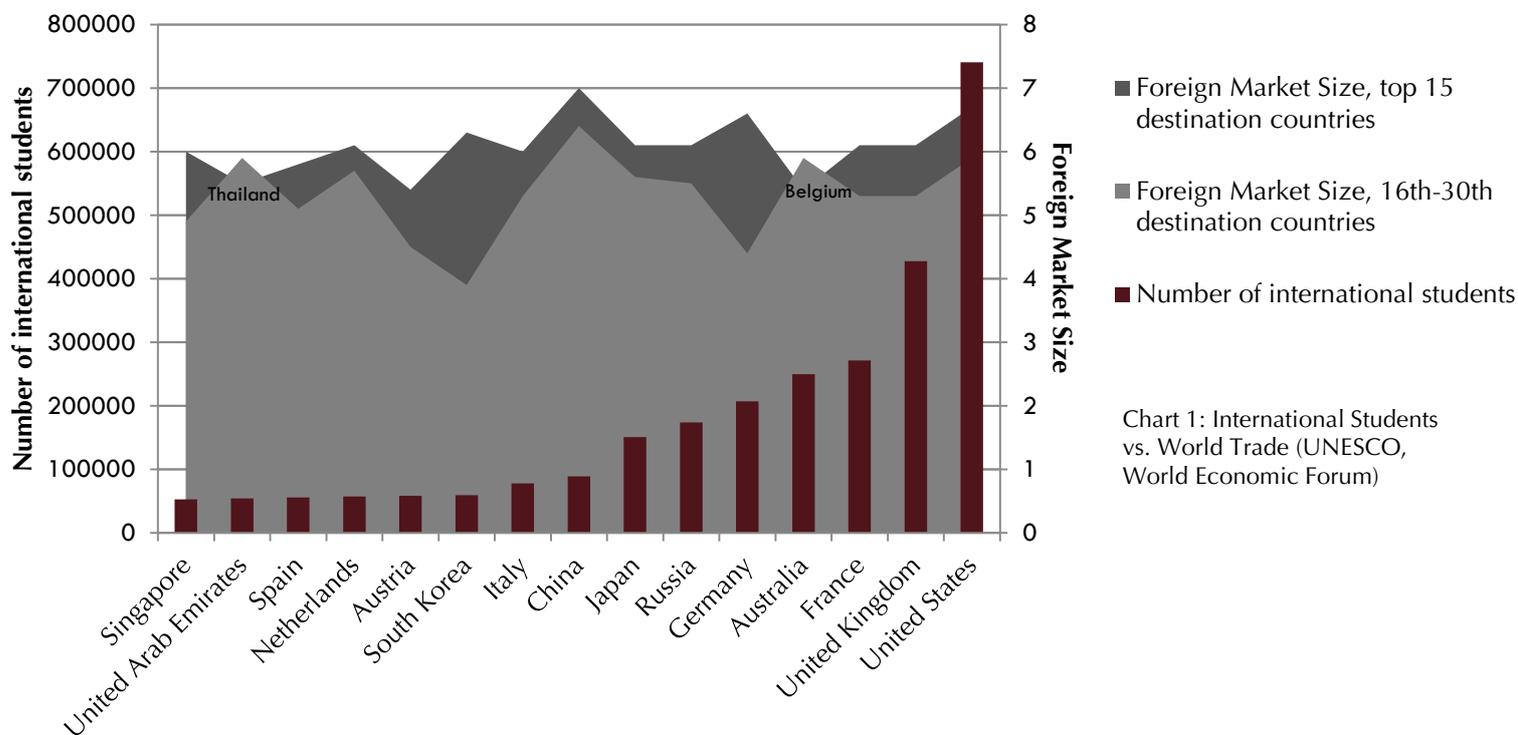


Chart 1: International Students vs. World Trade (UNESCO, World Economic Forum)

INTERNATIONALISATION AND EXPANSION

Using OECD student mobility data (2012) and World Economic Forum datasets (2012), Chart.1 seeks to illustrate the relationship between international student mobility and exposure to world trade. The top 15 countries in terms of international student numbers in 2012 are represented by the dark brown bars.

The United States leads the group with over 700,000 students in 2012 (as the left-hand vertical axis indicates). The dark grey background displays the Foreign Market Size associated with this top 15 group – the Foreign Market Size represents the value of exports of goods and services, normalised on a 1–8 scale.

Lastly, the light grey middle-ground accounts for the Foreign Market Size of the ‘second best’ student destination group according to OECD inbound flow data for 2012, i.e. the 16th to 30th countries in terms of international student numbers (the names of these countries are not displayed on the graph). Chart 1 can thus furnish us with a global picture of

as to how world trade matters in terms of student mobility, even partially so.

This said, student mobility is complex and affected by a range of determinants, to various extents: distance, language, world university rankings, and socio-economic conditions all play a significant part in the determination of choice (e.g. Wei, 2013; Gonzalez et. Al, 2011). Here, however, we have sought to isolate one particular dimension of this reality which we believe to be the most significant, while still being aware of the scientific limitations in excluding multiple variables.

Two things can be assumed from the data charted. Firstly, that the relationship between the level of student inflow and exposure to world trade is not linear. For instance, South Korea is more exposed to world trade than Australia (6.3 against 5.4), while it represents almost 200,000 less international students. However – and this is a key point - a higher number of international students is associated with, on average, a higher Foreign Market Size. This is displayed by the visible contrast between the best (top 15) and the second best (16-

30) student destination groups – the former tends to be higher than the latter, except for two countries of the 16-30 grouping (Thailand and Belgium which have higher foreign market sizes than UAE and Australia).

While other factors are at play, one can notice a telling relationship between exposure to world trade and international student flows – supporting the idea of Trade relations-student internationalisation (see Shields, 2013). But is this all down to trade sympathies or a condition of global expansion?

According to the 2013 issue of OECD’s *Education Indicators in Focus*, internationalisation is synonymous with expansion (OECD, 2013), and both are chief characteristics to globalisation. Tertiary education in OECD countries has rapidly increased in terms of overseas student intake, this, evidencing the expansion of tertiary education systems across the globe in line with economic globalization – the world growth of economies and the increase in the borderless mobility of human capital either through tourism, skilled work and/or education has increased.

The OECD further details that the number of students enrolled in tertiary education outside their country of citizenship “increased more than threefold, from 1.3 million in 1990 to nearly 4.3 million in 2011, representing an average annual growth rate of almost 6%” (OECD, 2013). On the basis of this data, the global economic crises provoked a shift in established patterns of choice.

In 2011, the largest numbers of foreign students came from China, India and Korea. Asian students represented 53% of foreign students enrolled in tertiary education worldwide, with 3 out of 4 enrolled in an OECD country. In some countries, such as China, students are encouraged to study abroad as part of a capacity building strategy (OECD/World Bank, 2007) and Brazil’s *Science without Borders* program, initiated in 2011, took global science and technology scholarships to new heights with the aim of funding 100,000 students by 2015.

Mobility Trends

With regards to student choice, important insights can be gleaned from the 2014 QS report *Trends in International Student Mobility*. On the basis of the QS World Grad School Tour Survey (where a total of 3,358 candidates completed the entire survey in

2008-9 and 4,155 in 2012-13) three key developments were identified:

- (1) Comparing responses from the 2009 and 2013 QS surveys, one of the most significant trends is the decline in popularity of the big four Anglophone destinations. While the US, UK, Australia and Canada remain among the most popular countries, all received fewer responses in 2013 compared to 2009.
- (2) The loss in market share experienced by these four Anglophone countries is in part due to the growth in popularity of alternative study destinations – notably Germany, which saw the largest increase in popularity in the QS surveys, selected by more than a quarter of respondents in 2013 compared to 17% in 2009.
- (3) Most study destinations enjoy strongest popularity among respondents within their own world region – and in some cases the impact of regionalisation is particularly evident. A good example of a beneficiary of this trend is the United Arab Emirates (UAE). In 2009, only 2% of survey respondents in each world region said they were considering the UAE as a study destination; in 2013, this had grown to almost 10% of respondents in the Middle East and Africa, and 3-5% in each other region.

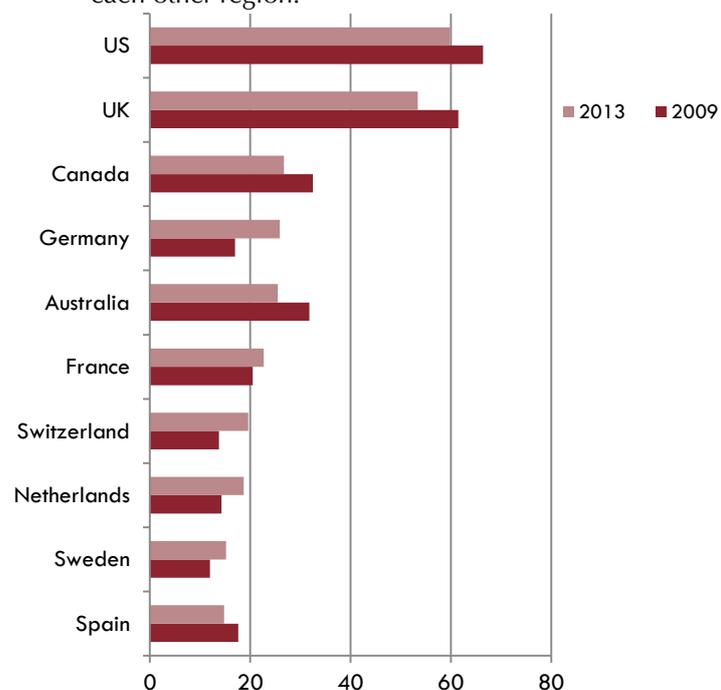


Chart 1.1: Top 10 Study Destinations according to the QS World Grad School Tour Applicant

The QS *Trends* report also evidences that:

- Students now consider a **broader range of study destinations** in their elective choices
- **Employment prospects** are a key feature of destination for younger generations
- **Institutional market visibility** is a distinguishing factor of student choice
- **Career expectations and ambitions** are a quality of life issue, informing choice

RANKINGS: a narrative to international change and social development agendas

The importance of rankings is that they are concordant with the economic transitions mapped by the World Bank, OECD and UNESCO data. In being so, they can be viewed as a narrative to regional trends and socio-economic development – they give form to specific data and intelligence relating the national and regional scenarios of our modern world.

Charts 2.0, 2.1 and 3.0 equate KOF Economic Globalisation data, with that of QS World University Rankings and student mobility data (UNESCO). Through these we are able to identify key patterns and tendencies which not only reflect trade relations at a general level, but also specific economic trends.

In Chart 2.0, Average Economic Globalisation is plotted vertically with the horizontal axis representing the number of mobile students per country. Intuitively, a good performance in terms of both economic openness and number of mobile students would place the country under examination in the upper right quadrant. Conversely, the bottom left quadrant would feature the least successful countries in the respect of economic flows.

Listed in Table 1 are countries with a GI (globalisation index) score of over 90. Also listed are the countries demonstrating prominence in terms of the relative number of mobile students (above 150,000).

Economic Globalisation (GI above 90)	Int. Mobility (in excess of 150,000)
Singapore	United States
Ireland	United Kingdom
Luxembourg	France
Malta	Australia
Netherlands	Germany
	Russia
	Japan

Table 1: high GI scoring countries and mobilisation

The countries identified above, not only have considerably more sizeable populations than the leading countries in the Economic Globalisation Index, but by extension boast wider infrastructures, and a larger economy in GDP and net wealth terms. In addition, they hold a larger proportion of Top 100 universities as ranked in the 2013 QS World University Rankings.

This raises the question as to whether the student mobility numbers exhibited by the second group are a direct consequence of the academic prowess of their domestic institutions, acting as beacons that attract international talent or whether the relationship is possibly inverted, signalling that this attraction and market ‘pull’ is based on economic performance and opportunities.

Under closer scrutiny, the numbers reveal a substantial gap between the leading country in Student mobility i.e. the United States, with over 709,565 students, a figure that is higher than the other two countries combined, namely France and the United Kingdom. The consequent point of interest is that the majority of the countries find themselves well below 100,000 mobile students, with the majority not breaking above the 10,000 range.

In Chart 2.1 the numbers are broken down by region and year. The data should be able to provide us with distinguishable trends, for at least some if not all of the geographic groupings:

1. Northern America
2. Western Europe
3. Northern Europe
4. Australia and Oceania
5. Eastern Europe
6. Eastern Asia

In terms of overall Economic Globalisation performance, Australia and New Zealand clearly lead the trend, with performances close to or hovering, around the 80% mark. In terms of total international student mobility, this has been holding steady between 7% and 9% for the selected region.

The largest proportion of international student mobility is naturally exhibited in the Northern America and Western Europe groupings since they include the top performing countries. However, we can safely say that when Northern America is concerned the trend has been somewhat negative, going from 29.9% in 1999 to 22% in 2011. The same negative trend with a net loss of approximately 7 points in terms of student mobility can be noticed in the Western Europe region, where the proportion dropped from 25.6% in 1999 to 17.8% in 2011.

Northern Europe is the third grouping in terms of mobile students in 2011 and the second highest with regards to the Economic Globalisation score at 74.2. The percentage of mobile students has been relatively declining, going from 18% in 1999 to 14.3% in 2011.

Eastern Europe seems to be making the biggest gains as far as Economic Globalisation is concerned with her indicator in this category going from 58.69% in 1999 to 70.6% in 2011, signalling the increased integration and economic openness that followed the ascension to the EU for many of these countries.

As far as international student mobility is concerned, the percentage of international students in these countries increased from 3.9% in 1999 to 8.76%, which in absolute terms lags in comparison to the top performing regions, but it is an increase of more than 100% in a space of 12 years.

The same can be said for Eastern Asia, where we can identify a very positive trend in the proportion international students in that region which went from 3.7% in 1999 to 8.27% in 2011, almost doubling the total of international students in the region within the given timeframe.

Finally South East Asia, with Singapore at the helm, has seen its international students' percentage skyrocket from 0.59% in 1999 to 3.64% - an increase of 500%. This is an impressive accomplishment for the region which is showing a very high potential and a positive trend that can carry the performance in the years to come.

With Chart 3.0, countries are plotted based on Average Economic Globalisation, and Average QS Ranking Scores. Volume of Entry denotes the Average Score based on the proportion of mobile students. The chart paints a somewhat different picture, since we can see in the upper left quadrant countries that previously did not feature significantly in the analysis and thus the strict correlation between net GDP and International student mobility as depicted in Chart 1 is loosened.

A closer look will reveal the following:

- In terms of optimum performance, Singapore is a world leader. Its average Rankings score for 2011 stood at 78 and its Economic Globalisation score at 96.7, the highest among all the countries in the chart. This performance, coupled with 47,915 mobile students for such a small nation in terms of total population clearly demonstrates the leadership position the country has assumed in the region.
- Ireland, Belgium, the Netherlands and Switzerland, all such countries with high Economic Globalisation scores between 79 and 90, are featured high up in the top quadrant. The Netherlands and Switzerland display strong Average Rankings scores and positive numbers in terms of international students, close or about to 40,000 on average.
- Canada, Denmark, Norway, New Zealand and Sweden are further additions to the group, however they are found somewhat lower positioned in terms of their Economic Globalisation average between 70 and 80. From this group Canada boasts over 120,000 mobile students; Sweden 36,500 and New Zealand 40,800.
- The next cluster is composed of United States, the United Kingdom, Australia, and Germany. In terms of average rankings score these countries are positioned between 42 and 52. In terms of Economic Globalisation this cluster

ranges between 56 and 66. They have lower Economic Globalisation scores and lower average rankings scores but in terms of absolute numbers of mobile students, their plotted position in the chart reinforces what has been hinted from our previous analysis, correlating net GDP and student mobility.

- Israel could be added to this group since it scores high in globalisation and rankings averages; however its total number of internationally mobile students is comparatively low.
- An interesting addition is the case of South Africa, which is showing an average Rankings score of 29, an Economic Globalisation score of approximately 60 and over 70,000 inbound mobile students. This country could be grouped with France, Italy and Spain as well as Saudi Arabia, since it exhibits similar numbers in Average rankings and Economic Globalisation, however, it is France who excels in the cluster with 268,000 inbound students.
- Malaysia presents an interesting scenario for a country making rapid advances in terms of economic globalisation (67.7). Almost equal in performance is Austria, and both countries score 32 in terms of rankings averages. For student inbound mobility the numbers stand between 64,000 and 70,000 respectively.

The analysis of the data and the plotting of information over time validate the widely held opinion that when international student mobility is discussed, a combination of factors is at play and rankings when combined with other datasets can furnish important intelligence. The combination we have used also shows that countries with open trade and globalised economies are able to attract talent and international students at a significant rate. Increased globalisation denotes a more vibrant and a possibly growing economy, which in turn creates the conditions for improved academic infrastructure and employability after graduation.

In addition, the emergence of East Asia as a key player in the student mobility arena can be traced to the economic expansion of the area and the increasing need for talent, infrastructure and skills

that go with it. The trend of international mobile students seems to follow a general economy based pattern, and with it, the level of academic performance is affected in the long term.

RECENT SCENARIO CHANGES: latent impact?

There have been key developments over 2013-2014 both in the fields of industry, policy and higher education which may affect flow performance:

- The United Kingdom has recently introduced the Immigration Act (2014), which carries several consequences, notably, the removal of free national health insurance (NHS) for international students; the requirement that banks verify the immigration status of new clients through enhanced checks, and, changes to make it easier for the Home Office to remove people from the UK. The added administrative burdens of universities to undertake enhanced immigration checks, has received criticism from both institutions and the National Union of Students.
- In the mindset to encourage greater investment from China, the UK also simplified the visa application process for Chinese nationals. This comes on the back of a 30-point U.K.-China communique signed by the prime ministers of both nations which mapped inroads for China to participate in the construction and expansion of British nuclear power and other infrastructural entities. Equally important, was that the yuan was to trade more freely in London's foreign exchange market.
- Talks of potential changes to the future demography of China are not unfounded: a recent HURUN survey high net worth individuals (HNWIs) Education, pollution and food safety concerns are the three main reasons for emigration and for the increased outbound flow of wealthy youth.

Key findings were:

- (a) US and Canada are preferred countries for investment immigration, mainly because of the ease of obtaining a green card, clear application procedures, and the large Chinese communities, including friends and family, already there.

(b) 66% of those who have emigrated, are applying or are thinking of doing so, would consider giving up their Chinese nationality to get a passport of the country they move to.

(a) Preferred amount to spend on investment immigration is 5 million CNY (US\$830,000).

- Whilst the Sino exodus is yet to be fully witnessed, universities in England have suffered a decline in the number of international students for the first time in 29 years as the strict visa policy and regulations have created inconveniences for potential students from India and Pakistan. To counteract the decline in international admissions from these regions, visa processing has been overhauled to facilitate rapidity and the UK will introduce its 'pass back' system enabling applicants from these regions to have their passports handed back to them upon visa application.
- Australia, since liberalising international student visas in 2011, experienced a sharp three year growth of almost 10% in international enrolment.
- Canada, has recently published its revised regulations for Student Visas making clear that that only students enrolled at designated institutions in Canada will now be able to apply for an international study permit.
- France officially intends to double its international enrolment to 20% of total tertiary enrolment by 2025, and in light of this goal, the French government has introduced more post-study work options, less bureaucratic barriers and even a "talent passport" with the aim of securing more inbound students and thus broadening the labor-force outlook in the mid-term.

WHAT TO MONITOR?

- HEI's will increasingly need to monitor global trends through certain optics and platforms, be these University Rankings, IMF reports and/or World Bank intelligence. The development of

an EU mobility scoreboard and a methodological framework for monitoring progress in mobility across the European Union, may very well become a policy directive requiring increased efforts towards sustainable mobility and partnerships (E.U, 2013).

- These intelligence sources should feed into institutional geo-targeting strategies, along with the specific milestones of institutional planning and the additional market intelligence of target markets.
- It will eventually become common practice, that HEI's seeking to not only boost partnership developments but also an in-country presence, will need to align themselves with the development goals and agendas of the specific countries targeted, in order to boost presence in a given region.
- HEI's will need to develop a fluency in the governance entities and global bloc entities. Despite its increasingly contested nature, the EU represents a highly evolved and innovative form of governance which creates a framework of collaboration for addressing trans-border issues, and where policy and globalisation have degrees of parity. But there has also been acceleration in regional relations beyond Europe: in the Americas (Mercosur), Asia-Pacific and, to a lesser degree, in Africa. These regional frameworks are different to those of the E.U but nonetheless hold significant consequences for the evolution of institutions within these regions, particularly in the Asia-Pacific (ASEAN, APEC, ARF, PBEC, and in Latin America with Mercosur).
- HEI's should monitor network densities of global mobility and establish partnerships which are secured, equitable and productive.
- HEI's will need to keep a finger on the pulse of policies which could impact, either positively or negatively, upon student mobility, acting preventively sooner than reactively. Likewise, changes in global investment patterns may preclude eventual mobility trends (non-Brics rapid growth economies for example).

CONCLUDING REMARKS

Indexes and metrics are a valid and necessary starting point for the analysis of globalisation and student mobility. However, in the end, it is all about people. When individuals decide to pursue studies in a foreign country, they do so in the hope of being exposed to an experience that will nurture their lives and help them build a better future for themselves and their families.

Cultural values are rapidly changing and the younger generations are realizing that international mobility dramatically increases the number of opportunities available for individual advancement. According to a survey conducted by Price Waterhouse Coopers, 66% of the “millennials” do think that international experience is key to expanding the career and social horizon. This is in contrast with the opinion of previous generations - particularly the “baby boomers”, which valued stability in a higher manner and were less open to change and socio-cultural transformation.

Interestingly, respondents from developing countries present a higher willingness to move between national borders than those from developed nations. In the case of the BRICS, for example, this rate exceeds the global mean, with around 80% of their surveyed millennials indicating a positive attitude towards international mobility. By contrast, in the United States, the United Kingdom, France, Germany and Japan the proportions are lower than the global average at around 50%. Germany displays the higher rate among those countries at 57%.

It is not a surprise, then, that Asian countries – particularly China and India – are the main source of internationally mobile students, while Western countries with solid higher education systems lead the way in terms of inbound flows (as per Charts 2; 2.1; 3).

This “cultural melting pot” poses a challenge for host countries. Although at first glance it may appear the students coming from developing countries are being unilaterally exposed in the cultural waters of industrialised nations, it is also true that the incoming cultures are transforming the receiving countries’ behaviours. Well established

institutions attracting an increasing number of international students are already facing a dilemma of balancing their own “traditions” – the ones that took them to the leading position they occupy today – with the need of internalising the cultural baggage brought in by international students.

Globalisation, particularly in education, does not seem to be a short-lived trend. What’s more, there have been recent changes in the way this spreads.

According to the latest edition of Ernst & Young’s Globalisation Index report, for example, “although trade in goods and services is returning to pre-financial-crisis levels and the flow of capital shows a stable increase, the game changer today is technology and the flow of ideas.” Of course, this is intrinsically connected to the higher education system. But the authors go even further to assert that “the globalisation of talent is still at an early stage”, which hints that the trend will continue in the future. All these events combined indicate that there is a global competition to attract talented people, which would nurture the future need of workers with the right skills and experience. With almost absolute certainty, this scenario is here to stay and poses the greatest test for higher education systems.

International mobility may be accompanied by turmoil but it is a challenge that any country and any university wishing to excel in the higher education arena cannot avoid. In the end, those higher education systems offering a combination of academic excellence, a positive and pragmatic approach to globalisation, a welcoming environment, genuine cultural empathy and a keen willingness to change and adapt to the new reality will be the leaders of tomorrow.

The key challenge facing Higher Education Institutions, is not only to monitor and track partnerships beyond the agreed MOA’s (memoranda of agreement) and MOU’s (memoranda of understanding), but to build and to sustain mobility and internationalisation, through the resourcing of intelligent solutions, trend analyses and performance data which can be leveraged into institutional strategy for growth, excellence and impact in an ever changing world.

Chart 2: Economic Globalisation / Inbound Student mobility

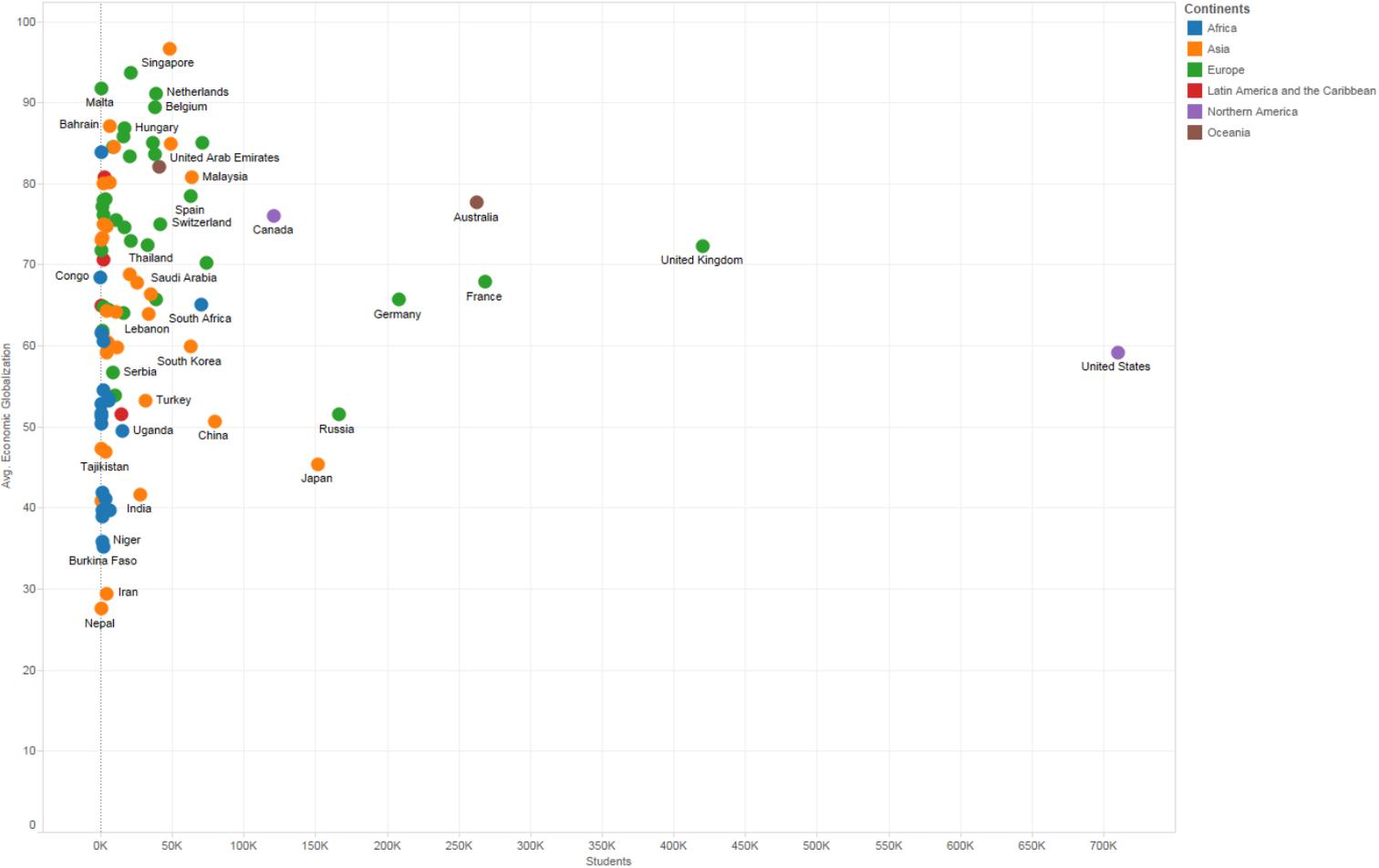
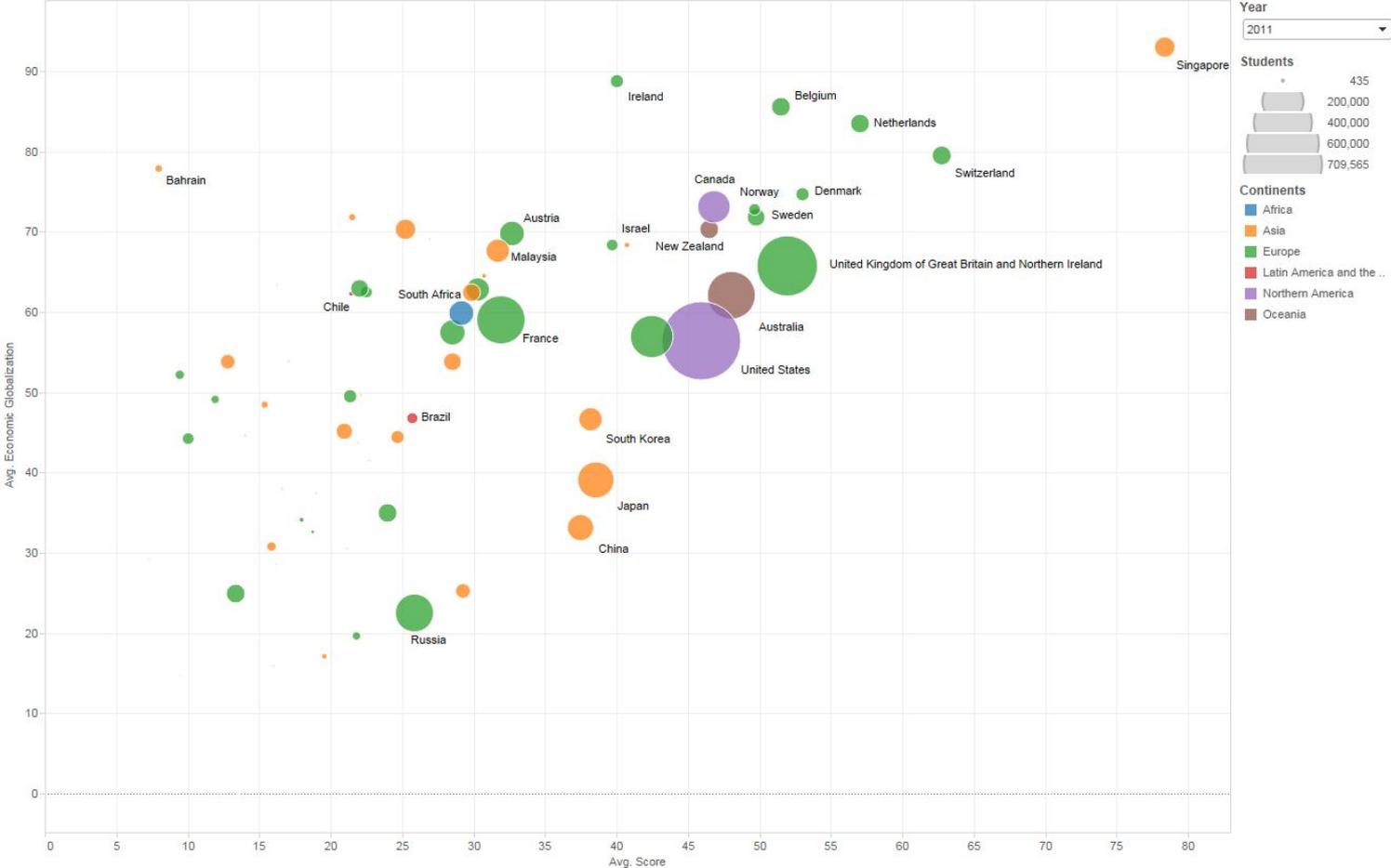


Chart 2.1: Economic Globalisation / Regional Flow (2009-2011)



Chart 3: Economic Globalisation / QS World University Ranking Averages



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About QS Intelligence Unit

QS has been conducting research in a range of areas since 1990 beginning with a global survey of MBA employers. The QS World University Rankings, the most well-known of the range of research projects that QS operates, have been operated since 2004.

To meet the increasing public interest for comparative data on universities and organisations, and the growing demand for institutions to develop deeper insight into their competitive environment, the QS Intelligence Unit was formed in 2008 as a distinct and autonomous department. Committed to the key values of rigorous integrity, undeniable value, unique insight and charismatic presentation, QSIU strives to be the most trusted independent source of global intelligence on the higher education sector. In addition to the research personnel already part of QS, QS Intelligence Unit (QSIU) has staff in both London and Singapore to deliver the detailed analysis in increasing demand from many institutions in the market.

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