



Europe

With a focus on
France, Germany, Italy, Spain

Global Student Flows
September 2025

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This report was developed with the support of the following QS team members, who contributed through research, analysis, content development, and expert review.

Jessica Turner, Chief Executive Officer

Dr Edward Harcourt, Senior Vice President

Patrick Brothers, Executive Director

Loren Griffith, Head of HolonIQ by Solutions

Alex Berka, Insights Manager

Allison Ridge, Global Director, Marketing

Annabel Light, Creative Designer

Anshari Perera, Senior Economist

Avindhya Cabral, Data Science Analyst

Bec Penn, Head of Creative

Dr Helen Kelly, Principal Consultant

Jen Foster, Head of Content

Kym Nguyen, Vice President, Student Recruitment

Louie Cornish, Content Marketing Manager

Louise Lancashire, Institutional Marketing Manager, Enrolment Solutions

Nethula Gunaratne, Data Science Analyst

Pieter Funnekotter, Vice President, Candidate Engagement

Purrvaja Jayakumar, Data Science Analyst

Dr Sarah Todd, Principal Consultant

Senili Wasage, Data Science Analyst

Global offices



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Note: When discussing 'Europe', we refer to continental Europe and Ireland and do not include the UK.

Contents

Contents	03
Foreword	04
Executive summary	06
2030 outlook	10
Major European student destination trends	14
Student origins	24
Outbound trends	36
Three scenarios for 2030	42
Drivers for growth	48
International student trends	52
Methodology	58

Foreword



Selma Dröfn Toohey
Executive Director
QS Quacquarelli Symonds

I am pleased to present the **Global Student Flows: Europe** report. For eight years, the Global Student Flows Initiative has been a trusted source of insight for policymakers, universities, and sector leaders – before, during and after the COVID pandemic.

This year, we have expanded the reach of the Initiative. By combining QS datasets – the International Student Survey and institutional performance data now overlay our Flows data – we can deliver a richer, more rounded perspective on international student mobility across the European higher education landscape.

Europe has long been a global hub for international students, home to some of the world's most sought-after study destinations. Yet the environment is changing. Growing numbers of universities in what have generally been considered as 'sending markets' are now seeking to position themselves as international recruiting hubs. In this context, European institutions must both capitalise on their well-established strengths and rethink their strategies as they prepare for the future.

This report provides a wide-angle view of international student mobility in Europe. Using an evidence-based framework, we model potential futures for student recruitment through to 2030, examining how the sector might evolve under three scenarios: Regulated Regionalism, Hybrid Multiversity, and Talent

Race Rebound. Together, these scenarios offer higher education leaders the strategic foresight needed to plan confidently for the years ahead.

We also analyse inbound and outbound mobility patterns within Europe and globally and forecast student numbers for 2030. When these trends are viewed alongside findings from the QS International Student Survey, they generate practical recommendations for tailoring student recruitment, engagement, and retention strategies.

At QS, we remain committed to supporting Europe's higher education sector as we all navigate an ever-changing market. The insights shared here mark only the beginning of a potential partnership with QS. Our teams provide advanced analytics for global benchmarking, connect universities with prospective students, and foster innovation and skills development to underpin sustainable growth. We are the partner with deep, data-driven knowledge of higher education globally who can help you understand the role your institution can play amid these uncertain times – and empower you to get there.

This report has been shaped by the expertise of policymakers, institutional leaders, and specialists who generously contributed their time. I would also like to extend my gratitude to my dedicated QS colleagues, whose professionalism has been central to advancing the Global Student Flows Initiative.



Your higher education partner

In today's challenging times, universities are reviewing their strategies and preparing for a different future. We are the partner who can help.

With unrivalled data, global reach, and sector expertise, we have deep knowledge of higher education globally and how to drive performance, engagement, and growth.

Why partner with QS

For more than three decades, we've worked in partnership with thousands of universities across the globe.

We help to:

Transform complex data into clear, actionable intelligence

Provide sector-leading analytics and insights to enable global benchmarking and performance improvement

Connect universities with the right students through our platforms, data, and targeted engagement

Map in-demand skills needs to teaching, research, and employability for future workforce readiness

Support innovation, new models, and market expansion for long-term institutional growth

Get in touch to find out more

Executive summary

Europe's post-pandemic recovery continues

International enrolments in Europe are projected to grow by 5% annually to 2030. While this is a marked slowdown from the 7% annual growth recorded between 2000 and 2024, it remains faster than the US, Canada, Australia and the UK, and Europe's growth is set to outpace the 4.6% rate it has observed post-COVID.

On the whole, European countries are not following the "big four" – the US, the UK, Canada and Australia – in restricting international student visas, thus positioning themselves well for future growth. There are notable exceptions to this – the Netherlands, for one.

Europe stands to benefit from the growing expansion of the African and Asian middle class, and offers affordable study opportunities which these markets continue to value. France, Germany, Italy and Spain's pivot to offering English-taught programmes has further broadened their appeal as study destinations. Now, continental European countries offer a high-quality education, often taught in English, at a fraction of the cost of the "big four". According to the QS International Student Survey, 55% of students prioritise affordability when choosing where to study, which reiterates the potential for Europe to benefit from shifting patterns of global student flows.

The four largest European destinations – Germany, France, Spain and Italy – will continue to hold the top spots, with all four showing resilient or accelerating post-COVID enrolment growth. Germany leads the continent, buoyed by demand from India, expanding English-taught programmes, and favourable immigration policies, though housing shortages and stretched university

capacity pose potential challenges. France benefits from low fees, welcoming government rhetoric, and strong connections with North and West Africa shaped by colonial history, but bureaucracy and debates around migration could hamper demand. International enrolments in Spain and Italy have surged recently, with Spain's growth fuelled by Latin American demand and Erasmus+ mobility, and Italy's business and STEM programmes attracting students from Eastern Europe, North Africa, and Asia.

Beyond these four, the Netherlands is tightening capacity, while Austria and Switzerland remain stable. Eastern Europe is increasingly appealing to Asian, Middle Eastern, and African students, especially in medical and health sciences, though its potential depends on investment and reputation.

Reputation and employability driving inbound student flows

QS International Student Survey data shows that students who want to study in Europe are increasingly looking at the reputation of an institution, and are making decisions based on their prospective career outcomes. This comes as the Academic and Employer Reputation for France, Germany, Italy, Spain is either declining, or plateauing. For key source markets, such as Latin America and East Asia, over 60% of students use reputation as a tool when making study decisions.

Reputation is not declining evenly across Europe, with some nations managing to improve their Academic and Employer Reputation; should this continue, these countries may start to take market share from the major European markets.

Labour market alignment is key for the future

International students have a crucial role to play as Europe faces labour shortages in in-demand fields. A recent European Commission survey found 63% of small and medium-sized businesses cannot find the talent they require. In the short term, international students can address labour market imbalances during their studies, if countries facilitate this.

The QS World Future Skills Index indicates that institutions in several European countries struggle to equip graduates with the skills employers need. To maintain inbound flows, and remain competitive, European institutions must align curricula to industry needs to ensure international graduates join the workforce fully prepared.

Three scenarios to help navigate future uncertainty

This year, we use three evidence-based scenarios as a lens to understand the medium-term outlook for higher education in Europe.

Regulated Regionalism: This scenario reflects a future where student mobility is not unrestricted but intentionally guided. Europe remains a major destination, but enrolments are increasingly selective, transparent, and aligned with broader national capacity and regional development goals. The **Hybrid Multiversity** scenario outlines a model where international students start their education online or in their home countries before travelling to Europe for shorter, focused in-person experiences. These onshore experiences are often linked to hands-on training, internships, or specialised language programmes. **Talent Race Rebound** sees European countries position international education as a direct pipeline for skilled migration, enabling the continent to proactively address its demographic challenges and ensure it remains competitive in the global race for talent.

Strategic challenges

1. Lack dedicated international student infrastructure

With growing numbers of international students considering Europe over the 'big four', the region's universities must develop the supporting infrastructure which helps international students to feel welcome and to succeed in their studies including suitable accommodation, dedicated admissions teams, career services and student visa expertise.

2. Declining or plateauing reputation

France, Germany, Italy and Spain are all facing difficulties with their reputations among employers and academics. With students increasingly looking to reputation when making study decisions, future inbound flows may be damaged if institutional reputation does not improve.

3. Employment outcomes not keeping pace with increased necessity for future skills

Several European countries struggle to equip graduates with the skills they require to meet the needs of employers when compared to global peers. Understanding what skills employers are looking for, and adapting curricula to enable students to develop those skills, will be crucial as institutions seek to grow their international student cohorts.

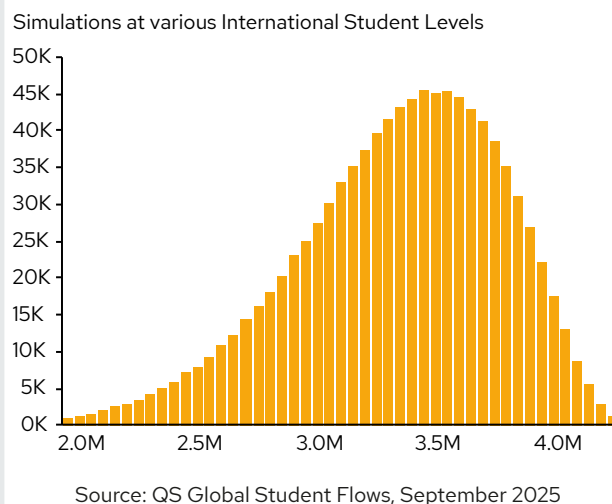
2030 outlook

Europe's role in global student mobility is expanding, reflecting both structural demand and shifting policy environments. International enrolments in the region are projected to grow by about 5% a year to 2030 – slower than the 7% annual pace recorded between 2000 and 2024, but still faster than in the US, Canada, Australia, or the UK. In those markets, tighter visa rules and rising costs are constraining demand. Growth to 2030 is set to outpace the 4.6% rate observed post-COVID. Unlike several other major study destinations, international student numbers held steady in many leading European destinations during the COVID pandemic, so Europe is positioned to capture a gradually larger share of global student flows in the years ahead.

Several forces underpin this trajectory. Demographic shifts and the expansion of middle-class populations in Africa and Asia provide a steady pipeline of students seeking affordable, reputable degrees. At the same time, Europe's ageing population is creating incentives for governments and universities to adopt more open policies, positioning international students as both an economic and strategic necessity. Europe's relative affordability compared with the big four Anglophone destinations remains an advantage, with public universities in Germany, France, and parts of Southern Europe charging only a fraction of the tuition costs in the US or UK. The proliferation of English-taught programmes has also broadened Europe's appeal, lowering a barrier that once confined foreign enrolments largely to Francophone, Hispanophone, or German-speaking countries. Erasmus+, with its deep network of institutional partnerships, continues to enable mobility across the continent and into Europe from abroad.

Germany remains the leading study destination within Europe. Over the last two decades, international enrolments in the country expanded at an annualised rate of over 4%, with the post-pandemic years improving on this growth. Between 2025 and 2030, growth is projected to average about 4.5% a year. Demand is led by India – now Germany's largest source market, ahead of China – followed by

Figure 1. Simulation frequency for total international students to Europe in 2030

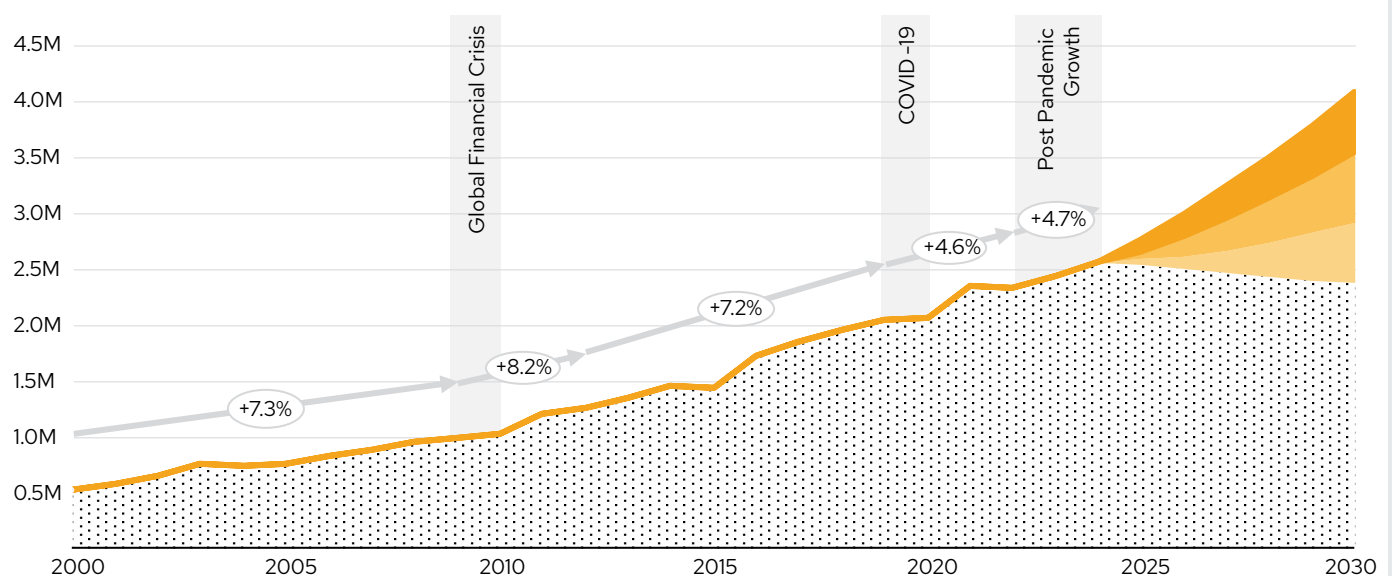


Türkiye, Austria, Iran, and a widening pool of students from the Middle East and Africa. Germany's 2024 Skilled Immigration Act, coupled with rising numbers of English-taught programmes, will strengthen the study-to-work pipeline, reinforcing the country's appeal for students who see higher education as a path to long-term migration. The main risks remain housing shortages in cities such as Berlin and Munich and the capacity limits of universities already stretched by past expansion. A YouGov poll in February 2025 found that 81% of Germans felt that immigration had been too high over the past decade and support for anti-immigration political parties, such as the Alternative für Deutschland, have increased in recent polls. DAAD has highlighted that only a third of international students feel well prepared to start a career in Germany, with insufficient language skills a key concern.

France offers a similar story of resilience; international enrolments expanded by over 6% annually in the decade before the pandemic, before stabilising at about 3.5% in the years that followed. Looking ahead to 2030, growth is expected to remain broadly in line with this post-COVID trend. France's appeal lies in its combination of relatively low fees, a government that has explicitly prioritised internationalisation, and strong historical ties and shared language with the Northern and Western African diaspora. Students from Morocco, Algeria, Senegal, and increasingly from Sub-Saharan Africa choose to study in France. The expansion of English-medium programmes has broadened access beyond Francophone markets, though the country's bureaucratic hurdles and frequent policy debates around migration remain sources of uncertainty.

In recent years Spain and Italy have seen some of the strongest growth in foreign enrolments within Europe. In Spain, international enrolments grew by an average of just over 7% per year between 2019 and 2024, with growth accelerating to double digits in the last three years as the sector rebounded from the pandemic. Growth to 2030 is likely to be driven by Latin America and Erasmus+ mobility, though visa changes and housing shortages pose risks. Italy, meanwhile, has expanded by nearly 10% a year since 2022 on the back of English-taught programmes in business and STEM. Demand from Eastern Europe, the Balkans, and North Africa, alongside rising Chinese and Indian numbers, underscores Italy's growing appeal despite bureaucratic and infrastructure constraints.

Figure 2. Total international students studying in Europe, 2000-2030F

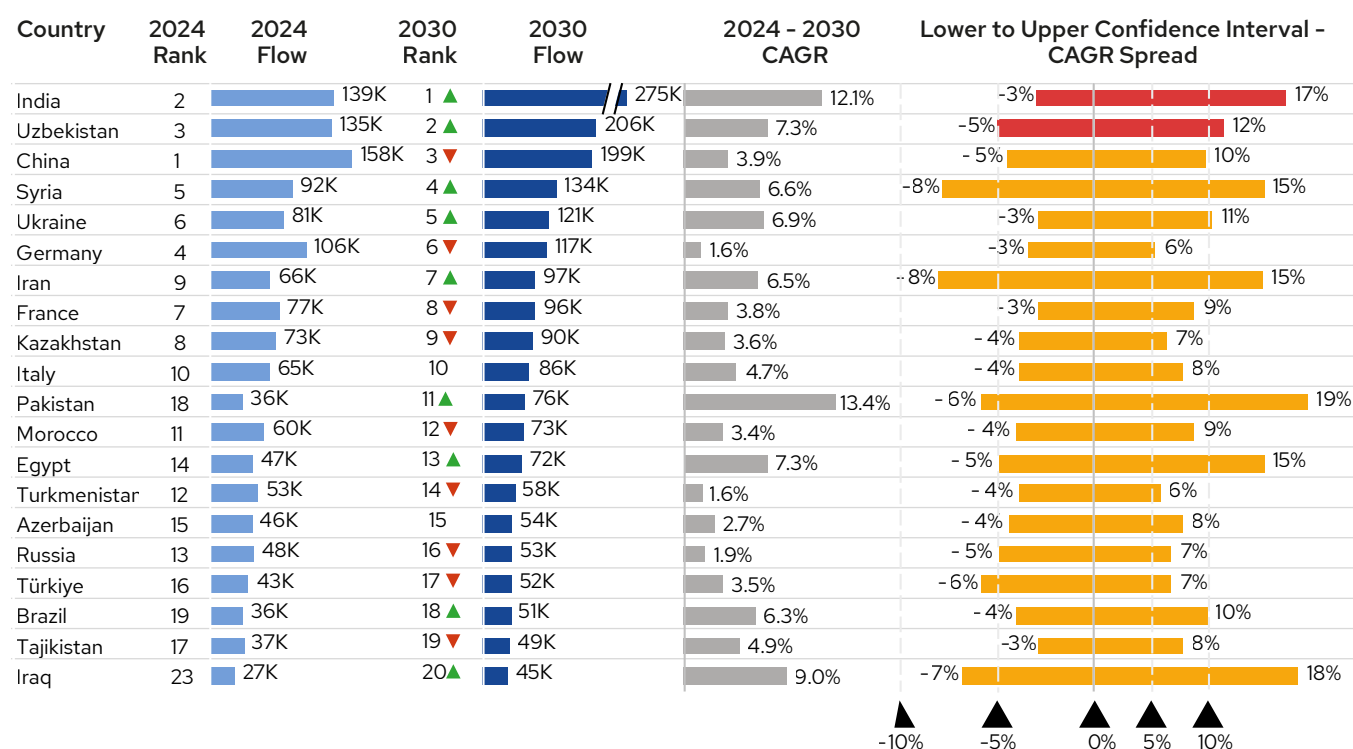


Source: QS Global Student Flows, September 2025

Outside the four largest destinations, Europe presents a more varied outlook. The Netherlands, long regarded as a popular destination for foreign students, is tightening controls as universities push back against capacity strains and housing bottlenecks. Switzerland and Austria, by contrast, continue to benefit from reputations for quality and relatively low costs, with steady inflows expected from Germany, Italy, and beyond. However, like in other European countries such as the Netherlands, there have been calls from the Universities Austria (Uniko) to raise the language level requirements for German-taught degree programmes. Eastern Europe presents a more nuanced story; countries such as Poland, Hungary, and Czechia are attracting more medical students from Asia and the Middle East, while Romania and Bulgaria are seeing growth in health sciences programmes. As demand from Africa and Asia continues to expand, the opportunity for Eastern Europe is significant, provided governments invest in

capacity and international branding. Risks to the outlook are not trivial. Housing shortages remain the most pressing structural constraint in big cities across Europe, with shortages in student accommodation acute in Germany, the Netherlands, and Spain. Immigration politics represent another wild card. While Europe as a whole is more open than most Anglophone destinations, rising populist pressures could trigger sudden restrictions. Competition is also intensifying. Asia, particularly China and Malaysia, is expanding its own international education capacity, while digital provision – especially English-language online programmes – provides alternatives to physical mobility. To add to this, demographic change within Europe means that domestic enrolments are stagnating or shrinking, leaving institutions ever more dependent on foreign inflows. Even so, Europe’s fundamentals remain strong. With projected growth of around 5% a year to 2030 – higher than any of the traditional Anglophone destinations – the continent looks set to deepen its role as a global education hub.

Figure 3. Top 20 source countries to Europe, 2024-2030F



Source: QS Global Student Flows, September 2025

Major European student destination trends

Germany, France, Italy and Spain in focus

Germany

Germany has long been one of Europe's engines of international student mobility, and its numbers reflect a two-decade surge. From 2000 to 2024, the number of international students grew at an average annual rate of over 5.5%, as Berlin's low-cost universities and reputation for quality engineering and applied sciences drew students from across the globe. Even the pandemic did not derail momentum; between 2019 and 2024, numbers still expanded by 4.8% a year.

Looking ahead, growth is projected at around 5% annually through to 2030, leaving Germany with an expanding student body supported by strong underlying fundamentals. The new Skilled Immigration Act, which eases pathways from study into work, is a powerful draw for students who see Germany not just as a degree destination but as a gateway to Europe's labour market. Tuition remains minimal, particularly at public universities, a critical advantage against competitors such as the US, UK, and Australia – indeed 63% of those looking to study in Germany prioritise affordability, a figure which is significantly higher than those looking to study in the UK or Australia (QS International Student Survey 2025). The proliferation of English-taught programmes at the master's level – now numbering in the thousands – widens Germany's reach well beyond traditional German-speaking markets.

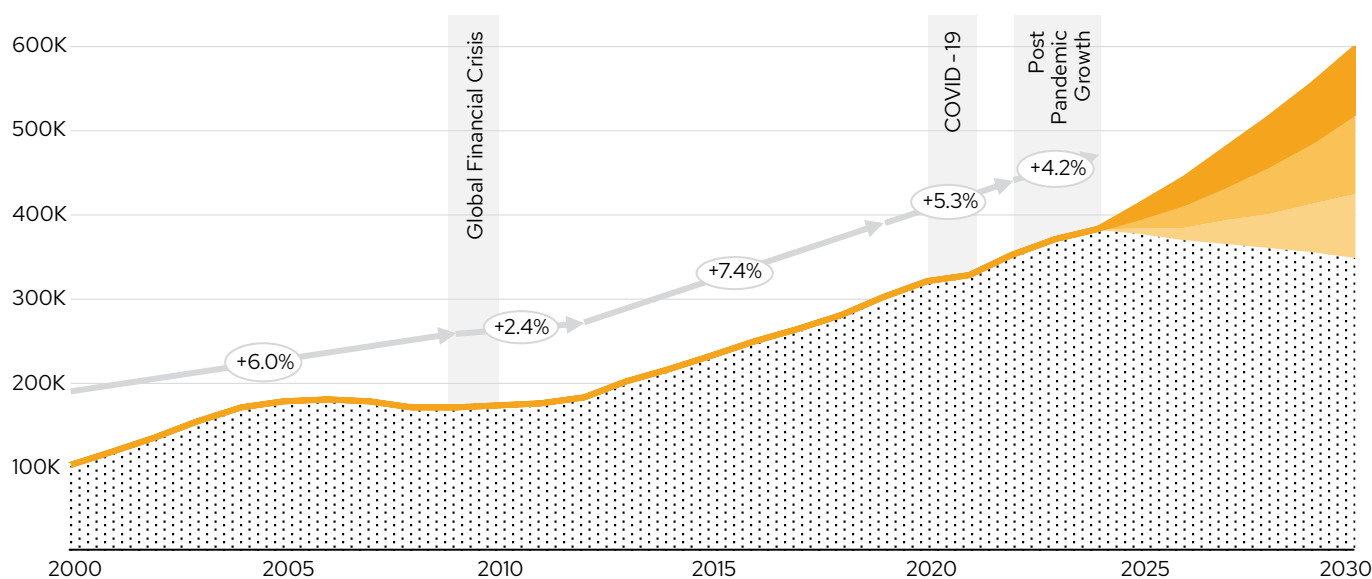
While the overall pool of source markets is broad, several countries will likely continue to dominate in volume. India has emerged as the largest single origin, overtaking China in recent years, and will continue to expand on its demographic strength and Germany's appetite for STEM talent. North African countries - Egypt, Morocco, and Tunisia in particular - are also sending increasing cohorts, encouraged by geographic proximity and shared history.

Risks to this outlook are equally clear. Housing shortages have become a structural bottleneck in university cities such as Munich, Berlin, and Frankfurt, where rents are surging faster than student stipends. Some 60% of students looking to study in Germany now worry about finding suitable accommodation, making it the second largest concern for students, after the cost of living (QS International Student

Survey 2025). Research from the 2024 MLP Studentwohnreport found that on average costs of typical student rents rose by 5.1% between 2023 and 2024. While average rental costs in Berlin and Leipzig rose by 9.4% and 9.3%, other popular student cities such as Würzburg and Tübingen only increased by 1.6%. Immigration bureaucracy remains cumbersome, with visa appointments and residence permits subject to long delays. Competition within Europe is heating up; Italy and Spain are expanding English-language provision aggressively, while France retains its dominance among francophone students.

The net result is a period of steadier, sustainable growth rather than another surge. Germany is likely to remain a top-tier destination - reliable, affordable, and employment-oriented, with the reputation of its institutions among employers consistently and significantly exceeding that of institutions in France, Italy and Spain, according to the QS World University Rankings.

Figure 4. Total international students studying in Germany, 2000-2030F



Source: QS Global Student Flows, September 2025

France

The outlook for student mobility to France is positive to 2030, with growth likely to average around at 4-4.5% a year through the second half of the decade.

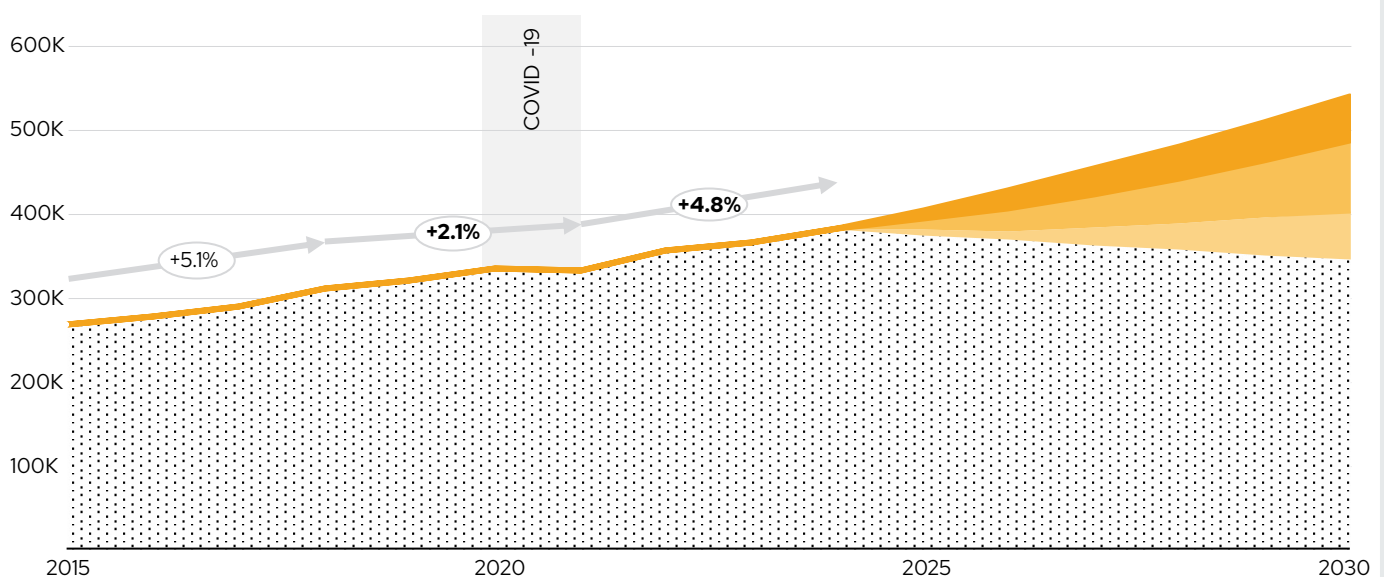
In the decade before COVID, foreign enrolments grew at over 6% annually but comparatively slowed in the second half of that decade. During the pandemic and its aftermath, growth held at 3.5% a year on average. In the upcoming period, France will likely consolidate its role as Europe's second-largest destination after Germany.

Three drivers stand out: First, affordability; even with the introduction of higher fees for non-EU students in 2019, France remains one of the most cost-effective major destinations, significantly cheaper than the key Anglophone destinations, with tuition and living costs well below the UK. This is reflected in student concerns, with 71% of students interested in studying in France citing cost of living as their principal source of anxiety. Second, policy support; the "Bienvenue en France" initiative has pumped resources into scholarships, visas, and marketing in priority regions. Third, demographics; Africa's fast-growing youth population, especially in Francophone countries, provides a structural source of demand unmatched by any other European country.

The composition of France's international student body underscores these trends. In the QS Global MBA Rankings 2026, six French business schools rank in the global top 15 for diversity, the indicator measuring the international make up of student intakes and faculty. Morocco, Algeria, and Tunisia remain the top sources in North Africa, all ranking among the top five source markets for France overall. Beyond Africa, China and India are important, with China being the third largest source market for France. The government is signalling a clear interest in strengthening its relationship with India as a counterbalance to its traditional reliance on Francophone countries; a target of 30,000 Indian students in France by 2030 was announced in January 2024. This push is expected to boost India's rank from 13th to 10th among foreign student populations.

Yet there are headwinds. France lags behind Germany, Italy, and Spain in the share of English-taught programmes, a crucial weakness in markets where French is not widely spoken. Communicating and studying in English is more of a concern to students looking to study in France than it is for students in other destinations (QS International Student Survey 2025). Bureaucracy remains a perennial complaint, from residence permits to housing allocation, and recent tweaks to visa rules may create additional friction. Housing shortages are particularly acute in Paris and Lyon, with rising rents increasingly pricing out students from lower-income backgrounds. Overall, France is likely to continue to thrive on affordability, soft power, and Africa's demographic momentum.

Figure 5. Total international students studying in France, 2000-2030F



Source: QS Global Student Flows, September 2025

Italy

Italy's international student flows are expected to grow at a moderate but steady pace, averaging over 5.5% annually in the next five years, led by strong demand from regions like Iran, Africa, China, and Türkiye. The outlook reflects a combination of relatively low tuition fees, more affordable living costs than in Northern Europe, and the rapid expansion of English-taught programmes, which have made Italy the fifth-largest provider of such courses in Europe – 60% of those looking to study in Italy prioritise affordability when making study decisions, reiterating its ability to harness the potential from shifting student flows. Demographic pressures, including an ageing population and declining birth rate, are also pushing Italian institutions to become more open to international students than in the past. Still, bureaucratic friction and strict visa requirements continue to make the process less smooth than in competing EU destinations such as Germany or France.

Policy reforms are an important driver of this growth outlook. The 2023 Decreto Cutro marked a turning point by removing quota limits on converting study permits into work permits, a significant change over the previous Decreto Flussi system, which restricted opportunities. This policy change strengthens Italy's attractiveness, even though the country still lags behind Germany and France on longer-term migration pathways, with graduates in Italy given just 12 months of post-study stay compared to 18 and 24 months, respectively. This is reflected in student priorities, with only 26% of those looking to study in Italy prioritising post-study work opportunities – a figure which is significantly higher for those looking to study in Germany and the UK (QS International Student Survey 2025). The new biometric requirements for visa applicants reflect standardisation with other EU states but add administrative hurdles that may slow inflows from some regions. Overall, reforms suggest Italy is moving toward greater openness, though progress remains more incremental than transformative.

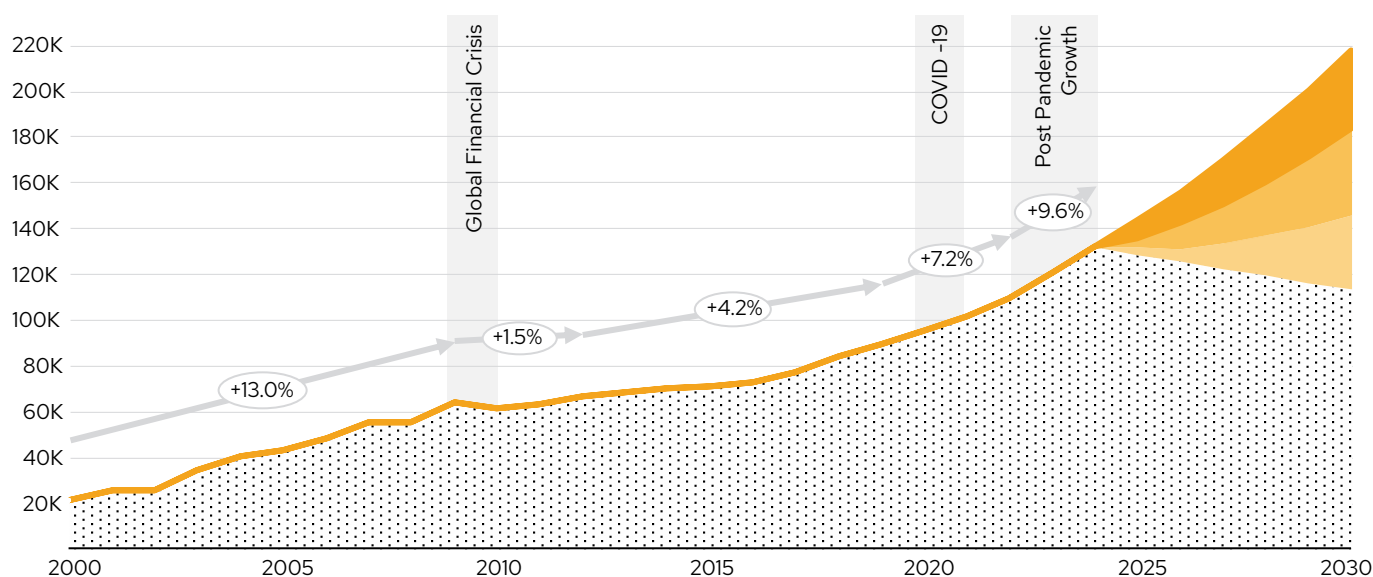
Türkiye and Iran are currently the strongest drivers of inflows, with rising tuition costs and political instability at home pushing students abroad, while Italy's affordability and scholarships such as "Invest Your Talent in Italy" serve as key pull factors. Diversifying the source of international students would be an important goal for Italy, as an over-reliance on any single country could pose a risk to long-term growth. This is especially true for source countries that face external pressures, like Iran, where political instability or other factors could lead to an increase in asylum seeker or refugee claims. While this is not an immediate problem for Italy's student pipeline, it highlights a key structural consideration for ensuring sustainable and stable foreign student inflows over time.

African student numbers – especially from Morocco, Tunisia, and Egypt – are on the rise, drawn by shared history and language, cost advantages, and the growing availability of English-taught programmes. Tunisian enrolments, for example, are expected to grow by 5% annually, up from a pre-pandemic 10-year average growth of 2%. The expansion of initiatives like Erasmus+ to include North African nations has further strengthened mobility from the region.

Chinese demand remains steady at a growth rate of just over 1%, concentrated in art, fashion, and design fields, supported by targeted pathways such as the Marco Polo and Turandot schemes. Within the EU, Romanian students continue to represent a significant share of inflows, benefiting from freedom of movement and Italy's well-regarded programmes in medicine and architecture.

Housing remains a critical challenge that could limit growth despite strong demand – nearly 60% of students looking to study in Italy cite concerns about housing availability as one of their principal worries. However, major Italian cities face shortages. Italy's National Recovery and Resilience Plan targets 60,000 new student beds by mid-2026, yet demand is anticipated to surpass supply even once these additions are completed. On the academic side, however, the expansion of English-taught programmes has been a powerful growth driver, removing one of the country's traditional barriers for non-Italian speakers. Combined with lower tuition and living costs compared with many Northern European destinations, Italy is emerging as an increasingly attractive and accessible option, particularly at a time when some countries, such as the Netherlands, are scaling back English-taught offerings.

Figure 6. Total international students studying in Italy, 2000-2030F



Source: QS Global Student Flows, September 2025

Spain

Spain is projected to see international student flows grow by more than 5% over the next five years, with a strong appeal across Latin America, Africa, and Europe, driven by recent policy reforms and expanded post-study opportunities.

The government has made it easier for international students to support themselves and transition into the labour market by increasing permitted work hours from 20 to 30 hours per week and removing the three-year residency requirement to switch from a student visa to a work permit. This is reflected in student priorities, with 48% of those interested in studying in Spain citing concerns about getting a job and 40% prioritising the graduate employment rates of their courses – both significantly higher than for other European destinations. Longer permit validity has reduced bureaucratic hurdles, while new visa provisions open opportunities for international students and specifically target those who have been restricted from the US or cannot complete their studies there due to visa suspensions. Simultaneously, while authorities have implemented restrictions on short-term language courses, including minimum age requirements, a new two-year study cap, and a ban on converting from such permits into work visas signals a clear shift toward attracting degree-seeking students who are more likely to remain and contribute to Spain's economy.

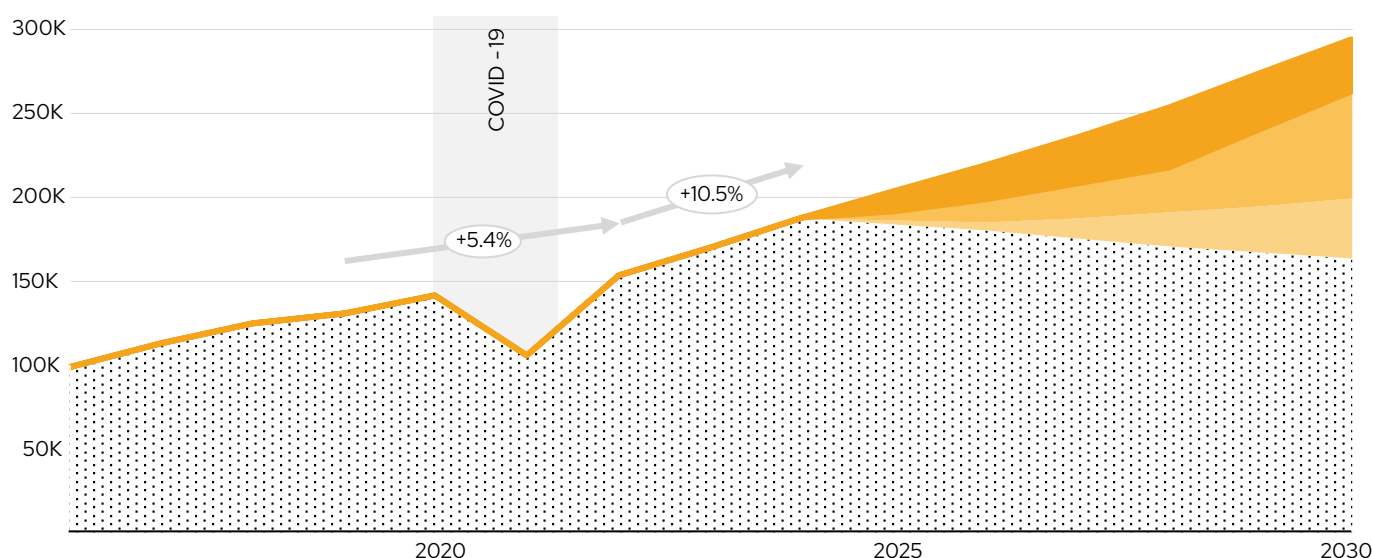
Latin America is set to remain one of Spain's fastest-growing source regions at an average growth rate of close to 5%, led by Colombia, Mexico, Ecuador, and Peru, as shared language, cultural ties, affordable tuition, and tightening US visa restrictions redirect demand. Africa is also a significant growth driver, having grown at a rate of 14% annually since 2017. The growth outlook remains strong under Spain's "Focus Africa 2023" strategy launched in 2021, with Morocco, Algeria, and Nigeria targeted to strengthen both educational and economic links.

Within Europe, Spain's position as the top Erasmus+ destination secures steady inflows from Italy, France, and Germany, while together these countries, along with the US, Colombia, Mexico, and Ecuador, account for nearly half of Spain's international student population. Beyond these core markets, Spain is drawing greater interest from South Korea, Japan, and Canada, where students are attracted

by affordability, easier visa pathways, and the option to study in Europe when access to the US is more restricted.

Spain competes most directly with Germany, France, and the Netherlands in the EU. Germany and France remain attractive due to low tuition and global academic prestige, while the Netherlands has pulled back slightly in response to housing shortages and social integration concerns. Spain's edge lies in combining relatively affordable tuition with stronger work rights and clearer post-study residency opportunities, making it an increasingly competitive choice for degree-seeking students. Some 47% of those looking to study in Spain cite information on work placements and links to industry as one of their preferred marketing communication topics, a figure which is significantly higher than for other European destinations. Its continued leadership within Erasmus+ further cements its role as a major hub for intra-European mobility.

Figure 7. Total international students studying in Spain, 2000-2030F



Source: QS Global Student Flows, September 2025

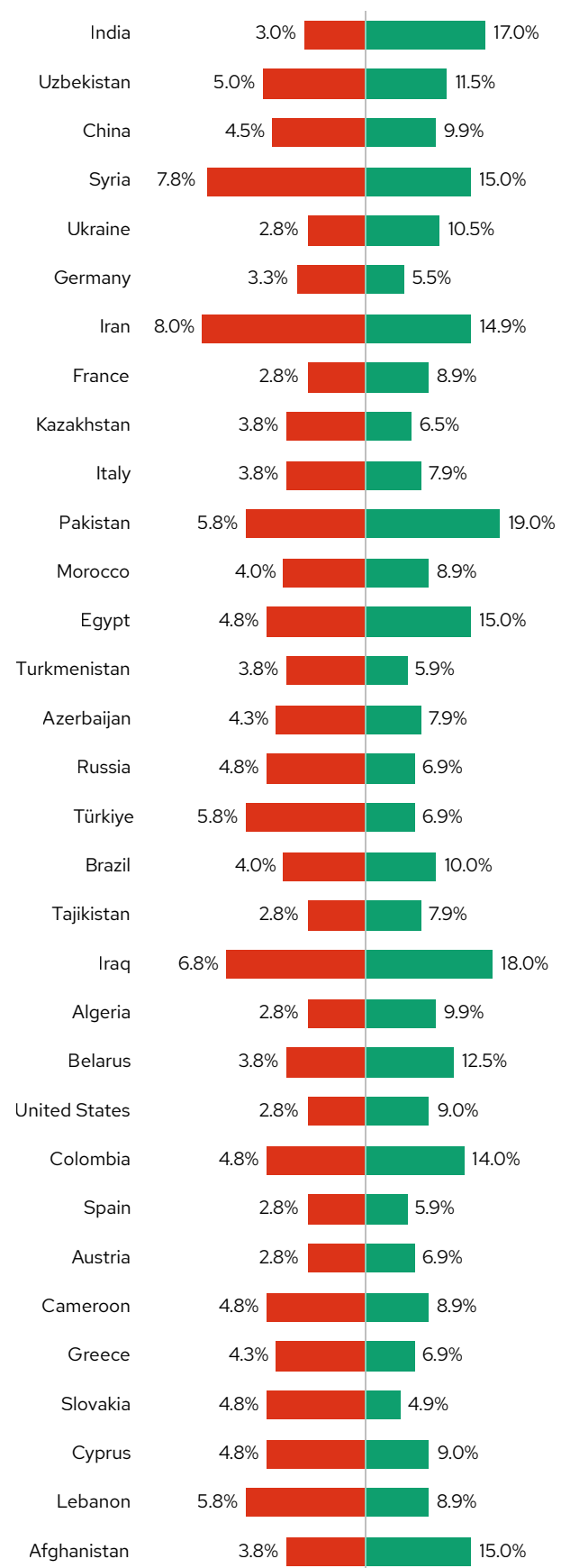
Student origins

Figure 8. Europe major student origin growth, 2000-2030F
Point estimate growth outlook



Source: QS Global Student Flows, September 2025

Figure 9. Europe student origin growth outlook. Lower and upper 95% confidence intervals 2024-2030F



Source: QS Global Student Flows, September 2025

South Asia

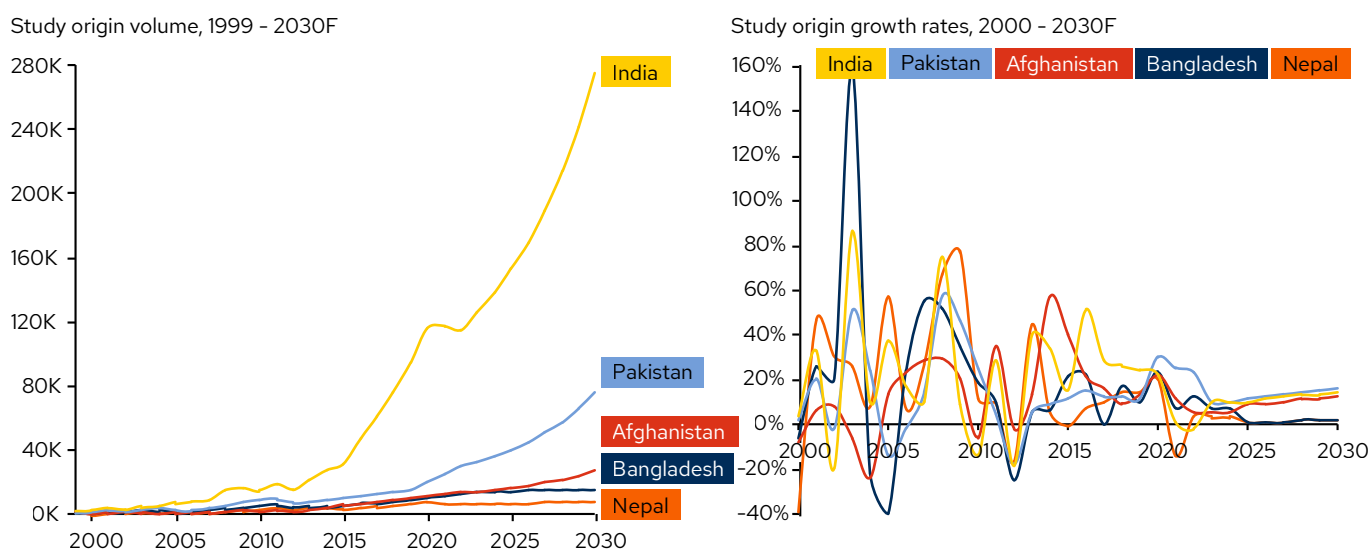
Student flows from South Asia to Europe are expected to see strong growth of more than 8% over the next five years, driven by rising demand from key source markets, including India, Pakistan, and Nepal. Traditionally inclined toward Anglophone destinations like the US, UK, Canada, and Australia, South Asian students have been gradually shifting toward Europe as these countries tighten immigration rules, raise tuition fees, and restrict student inflows. Most countries in South Asia recorded double digit growth in the five years prior to COVID. However, this growth has since slowed and is showing signs of a gradual tapering.

Europe has positioned itself as a competitive alternative by offering comparatively affordable tuition, a wide range of English-taught programmes, and increasingly favourable work and migration opportunities. Spain has removed the three-year residency requirement to switch from a student visa to a work permit, while Italy has lifted quota limits on converting study permits into work permits. At the same time, Germany has lowered minimum salary thresholds for the EU Blue Card, easing access to long-term employment. These reforms are

already reshaping mobility, as indicated by Indian enrolment in Germany, which has more than doubled over the past five years, making India the top source country and the largest international student group in both 2023 and 2024. Similarly, Pakistani student numbers in Germany rose by 20% between 2023 and 2024.

Affordability is a central driver. Many European countries offer free or low-cost higher education compared to the US, Canada, or Australia, where the cost of study has risen steeply. However, some countries are looking to international students to fund higher education. Norway, for example, introduced fees for overseas students in 2023 before introducing new rules in 2025 permitting universities to set fee levels for students from outside the EU. Flexible work rights, such as the allocated 30 hours weekly in Spain, allow students to offset expenses while gaining professional experience. Combined with more accessible post-study work rights and residency pathways, these advantages reinforce Europe's appeal as South Asian students increasingly seek destinations that balance affordability, employability, and long-term migration opportunities.

Figure 10. Europe student origin growth, 2000-2030F. Point estimate growth outlook



Source: QS Global Student Flows, September 2025

East Asia

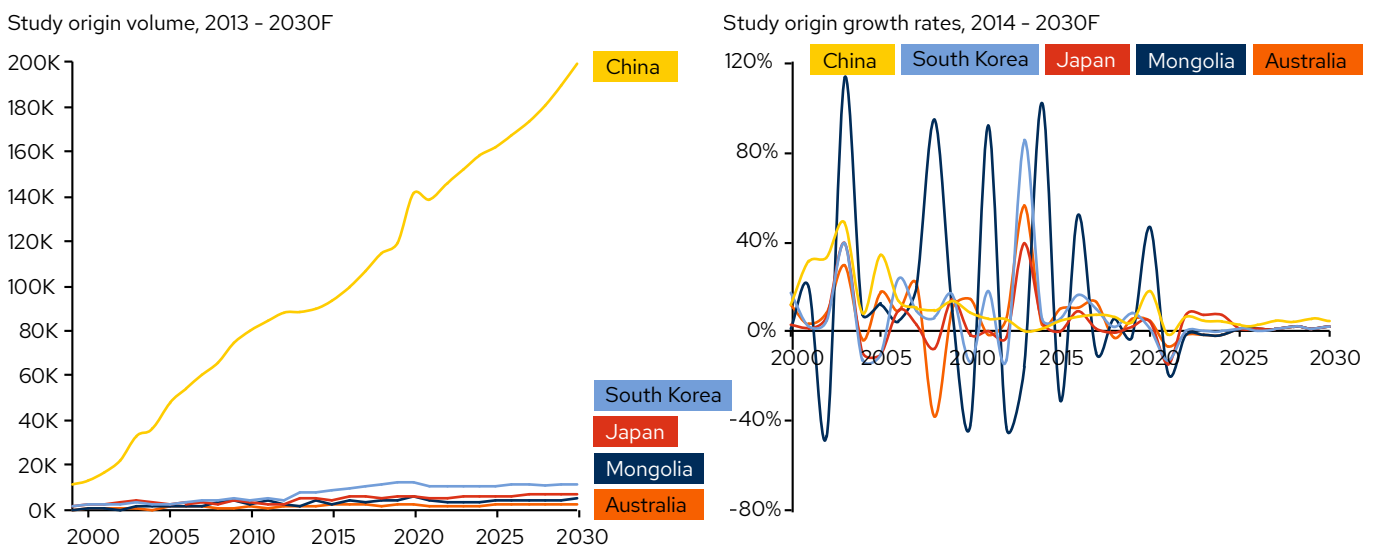
Student flows from East Asia to Europe are expected to grow at a moderate pace over the next five years, with China remaining the largest source market, with overall growth projected at about 3.5%. Growth has averaged slightly over 4% in the last seven years, with a dip of 3% during the height of the COVID pandemic in 2021. Worsening political relations, rising costs, and visa barriers in the “big four” Anglophone destinations – traditionally the preferred options for East Asian students – are pushing demand toward Europe, which offers stability, affordability, and comparatively smoother visa and administrative processes.

For Chinese students, who represent the bulk of East Asia’s outbound flows, affordability and university rankings remain top priorities. Europe’s relatively low tuition fees and tuition-free programmes provide strong incentives, but challenges such as housing shortages and rising rent in major European cities could regulate the pace of growth. At the same time, Southeast Asia is emerging as a regional hub, with Malaysia in particular attracting a growing number of Chinese students, which may further limit the scale of flows from China to Europe.

Beyond China, South Korea and Japan are also important source markets. Korean student flows to Spain are expected to grow at a significant rate of over 8%, as Spain has eased entry for students restricted from the US, a crucial factor given that South Korea ranks among the top three source countries for US-bound students. Japanese and Korean students remain drawn to Europe’s competitive tuition fees, high-quality English-taught programmes, and work opportunities, though their overall growth rates are slower than those from China.

Overall, East Asian student inflows to Europe will continue to increase moderately, shaped by Chinese students seeking affordable, high-quality education and South Korean students driving stronger growth in select destinations such as Spain. While intra-regional mobility within East and Southeast Asia is rising, Europe’s combination of globally recognised degrees, industry-linked programmes, and favourable post-study pathways ensure that it remains one of the most compelling alternatives for East Asian students amid tightening conditions in Anglophone countries.

Figure 11. Europe student origin growth, 2000-2030F. Point estimate growth outlook



Source: QS Global Student Flows, September 2025

Africa

Student mobility from Africa to Europe is on a steady upward trajectory, with growth set to accelerate in the coming years. While most top source countries from the region are expected to see a growth rate of 2-5%, Egypt stands out as a significant exception with a stronger growth projection. International student mobility from Sub-Saharan Africa has seen a significant boost in recent years. Before the COVID pandemic, growth averaged 6% annually. This rate has since accelerated, averaging 9% in the years that followed, largely due to a sharp increase in 2020 and 2021 that has now begun to moderate.

The growth is underlined by strong linguistic and cultural ties, affordability, and favourable policies across Europe, as well as the expansion of programmes like Erasmus+ into North Africa. With Anglophone destinations imposing increasingly restrictive entry policies on African students, Europe is positioning itself as the most accessible and attractive option.

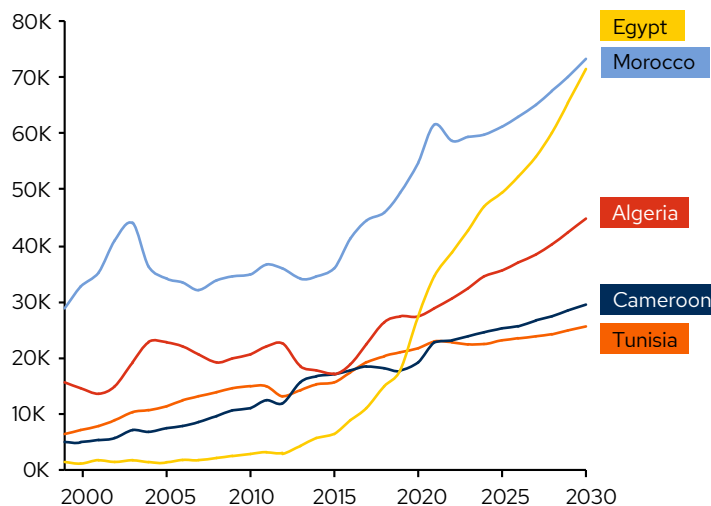
France continues to be the leading destination, with African students now making up nearly half of its international student population.

Morocco and Algeria drive much of this growth, with Moroccan students alone exceeding 43,000 in 2024 and representing over 11% of all foreign students in France. Policy frameworks such as “Etudes en France”, a centralised online platform that streamlines applications and visa requests, have significantly lowered barriers for students from countries including Morocco, Tunisia, Algeria, Senegal, and Côte d'Ivoire. Coupled with low tuition fees, a wide range of programmes, and the “Bienvenue en France” label that emphasises student support, France has reinforced its central role in attracting African talent.

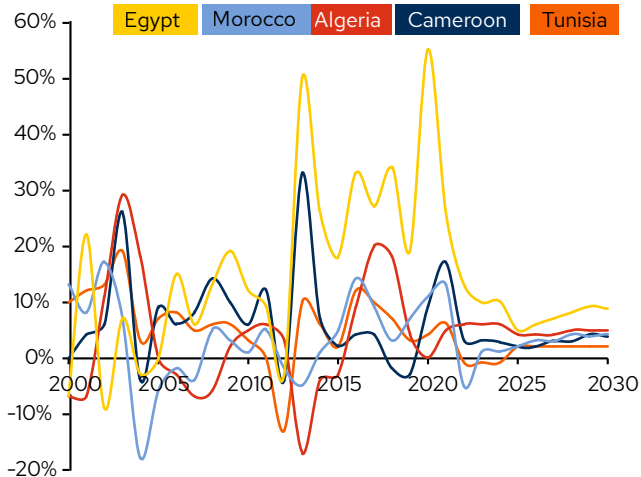
Spain is also strengthening its ties with Africa through the Focus Africa 2023 strategy, launched in 2021, which drove enrolment growth at an average of 13% annually between 2022 and 2023. Similarly, Italy is seeing a steady rise in inflows from Morocco, Tunisia, and Egypt. Beyond North Africa, countries such as Nigeria, Ghana, Cameroon, and Senegal are deepening their connections with European higher education systems, especially in France and Germany.

Figure 12. Europe student origin growth, 2000-2030F. Point estimate growth outlook

Study origin volume, 2013 - 2030F



Study origin growth rates, 2014 - 2030F



Source: QS Global Student Flows, September 2025

Middle East

International student mobility from the Middle East to Europe is driven by affordability, cultural ties, and targeted government initiatives that create clear pathways to employment. Europe's long history of welcoming Middle Eastern students, particularly in France, Germany, and Italy, has built a stable foundation of demand. With Europe facing demographic decline and falling birth rates, attracting more international students is also becoming a strategic priority across the region.

Overall, the outlook for Middle Eastern mobility to Europe is positive. While outbound capacity remains constrained by currency depreciation and political instability in parts of the region, demand continues to rise from countries including Iran and Syria. Looking ahead, the benefits of mobility are also likely to extend beyond the traditional hubs, as smaller European countries position themselves more actively within the global competition for students.

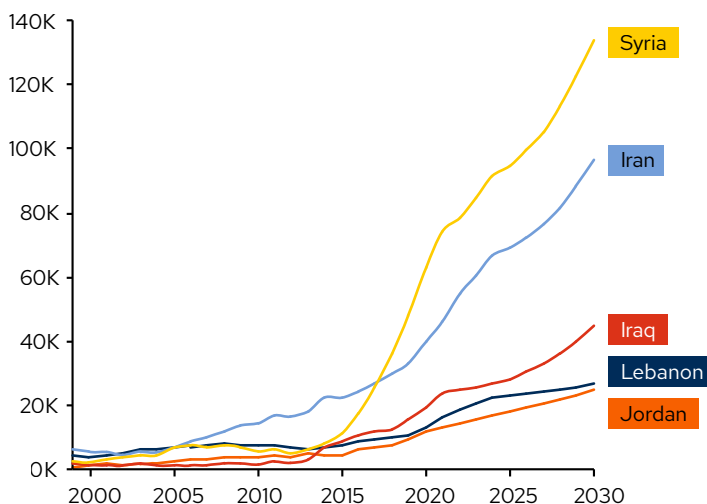
In 2024, Middle Eastern students accounted for more than 10% of the international student body in Germany, with Iranians and Syrians

constituting a large portion of student numbers. Germany's tuition-free system and clear post-study work pathways are key attractions, though pressures such as housing shortages are becoming more visible. Italy complements this landscape by hosting 10% of international students from Iran in 2024. Its "Invest Your Talent in Italy" programme further strengthens its appeal by combining scholarships and internships to link study with employability for students from Iran and Türkiye.

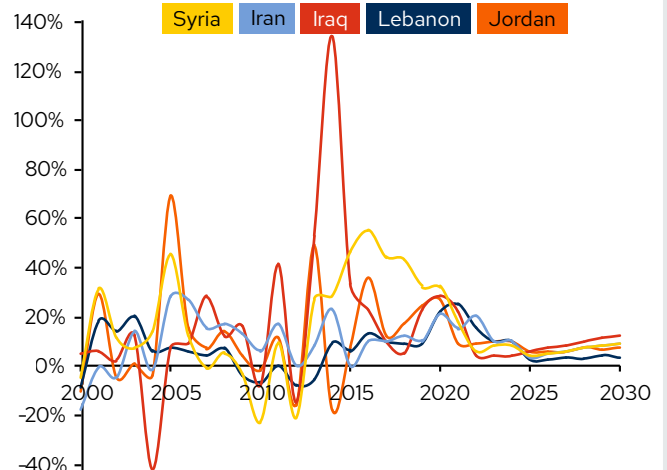
Middle Eastern students made up 2% of Spain's and 4% of France's international student populations in 2024, positioning them as smaller, yet growing, markets. France attracts students with its highly subsidised tuition and strong cultural ties. While France is a traditional leader in arts and humanities, the increasing availability of English-taught programmes across Europe is expanding options for students interested in other fields. This trend, however, could be impacted by the UAE's growing influence as a regional education hub, which may slow down outward student mobility to Europe.

Figure 13. Europe student origin growth, 2000-2030F. Point estimate growth outlook

Study origin volume, 1999 - 2030F



Study origin growth rates, 2000 - 2030F



Source: QS Global Student Flows, September 2025

Latin America

Student mobility from Latin America to Europe is projected to increase by approximately 4% annually over the next five years, with key contributions from countries like Colombia and Ecuador. Despite this growth, Latin American students currently constitute a relatively small portion of Europe's total international student body, accounting for only 5-6% of the total share. Spain stands out as a top destination for students from the region, accounting for nearly 60% of international students in 2024, largely due to a shared language and strong cultural ties that facilitate easier integration.

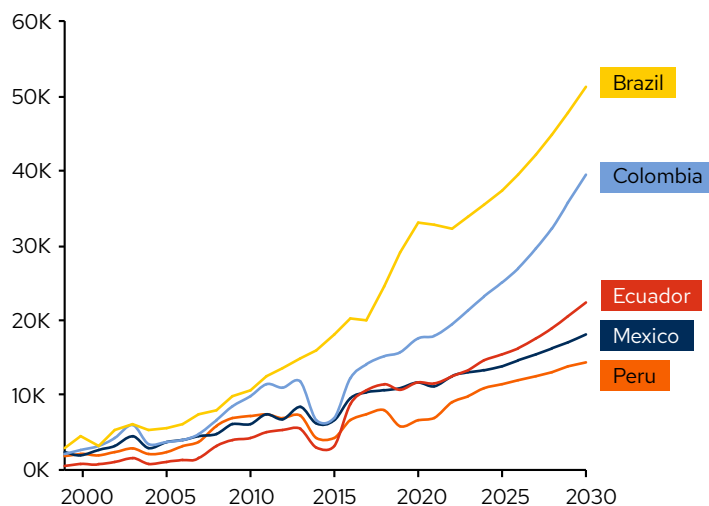
Portugal also experienced a sharp growth in interest from Latin American students in 2022, with over 20% of international students being from Brazil. Mexican students' interest in Spain increased by nearly 20% year-on-year in 2024, positioning Mexico as the third-largest source country from the region. Other European countries, such as Italy, are maintaining student numbers from Mexico and from across Latin America.

Student mobility from Latin America to Europe is significantly influenced by the Erasmus+ programme, which facilitates academic exchange and provides scholarships. This, combined with the strong reputation of European higher education and specialised graduate programmes, makes Europe an attractive destination for Latin American students. While many courses are available in English, students often have the opportunity to learn additional European languages such as Spanish, French, or German, which enhance their global competitiveness. Spain's linguistic and cultural affinity particularly appeals to Spanish-speaking Latin American students. Degrees from European universities are valued credentials that improve employability. This trend continues and builds upon pre-pandemic migration patterns, including the 'second migratory boom' focused on Spain.

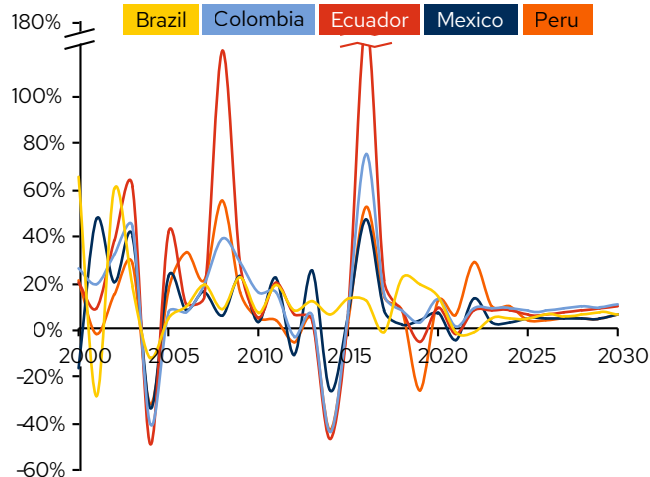
Looking ahead, Europe is expected to maintain its appeal towards Latin American students, supported by quality education, cultural ties, expanded English programmes.

Figure 14. Europe student origin growth, 2000-2030F. Point estimate growth outlook

Study origin volume, 2013 - 2030F



Study origin growth rates, 2014 - 2030F



Source: QS Global Student Flows, September 2025

Southeast Asia

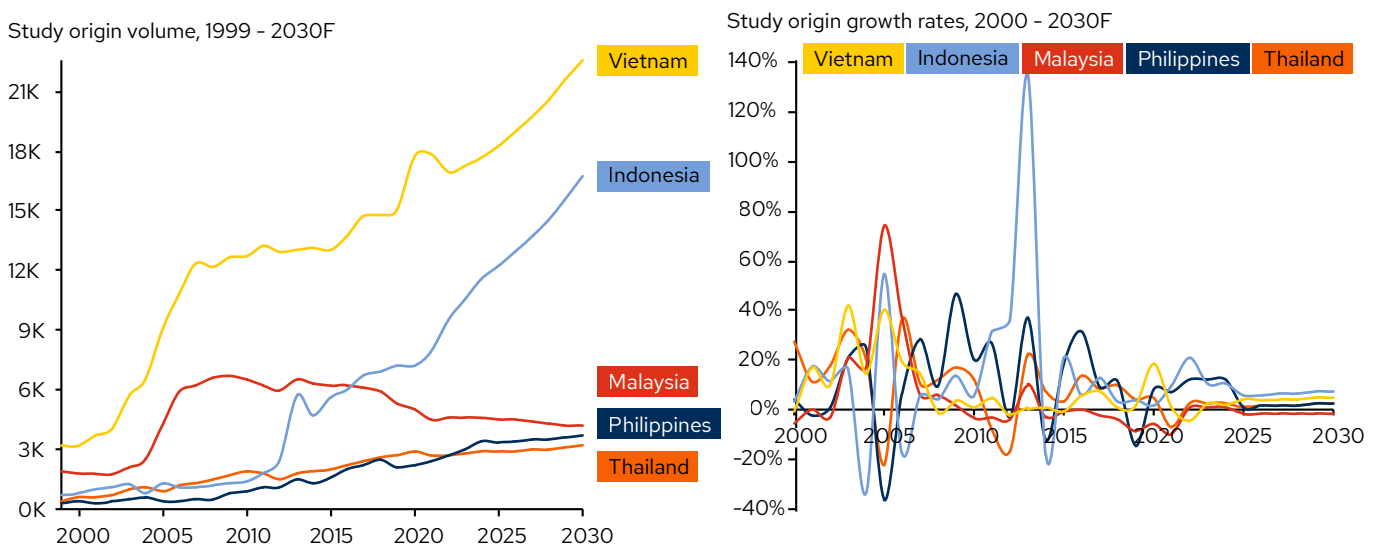
Student flows from Southeast Asia to Europe are expected to grow at a rate of about 4% over the next five years, reflecting a slower pace compared to the post-COVID growth rates in the region. This growth will be led primarily by Vietnam, the region's largest outbound market, which accounts for the majority of Southeast Asian students in Europe. This is a reflection of Vietnam's rapidly expanding middle class and its strong cultural emphasis on education.

Vietnam has firmly established itself as one of Southeast Asia's top source countries. While traditional destinations such as the US, Australia, and Japan remain popular, Europe, especially Germany, is gaining traction due to affordable tuition, the expansion of English-taught programmes, and deepening cultural and academic ties. Indonesian enrolments in Germany are also expected to rise at a strong pace of over 6%, supported by long-standing educational linkages, the appeal of technical programmes, and cost advantages. In contrast, inbound flows from Thailand and Singapore remain relatively stagnant.

Growth from the region as a whole is likely to remain moderate, given that Southeast Asia is positioning itself as a higher education hub. Malaysia, in particular, is attracting more international students and investing heavily in its universities, which has led to expectations that its outbound flows to Europe, such as to Germany, could decline in the coming years. European institutions are also competing with regional hubs in Asia, such as Japan and South Korea, which are increasingly attracting Southeast Asian students with their own world-class institutions and more affordable options.

Even with this intra-regional competition, Europe remains attractive through initiatives like Erasmus+, which expands scholarship and exchange opportunities for Southeast Asian students and lowers financial barriers. Overall, while Europe will likely not see explosive growth from Southeast Asia, it will continue to see stable volumes, with steady inflows led by Vietnam, supported by Indonesia, and tempered by Malaysia's emerging role as a regional competitor.

Figure 15. Europe student origin growth, 2000-2030F. Point estimate growth outlook



Europe

Intra-European student mobility, which accounted for 60% of international students in 2012, slowed to nearly 50% in 2022. Despite this decline, Europe remains a key study destination for many of its students, with countries like Spain, France, Germany, and Italy standing out. This enduring trend is driven by Erasmus+, which continues to foster cross-border education within the region. Intra-European student mobility is projected to grow by 4% annually until 2030, a rate consistent with recent post-COVID trends.

Rising costs of tuition and growing academic competitiveness, paired with a growing desire for international exposure, have encouraged students to look beyond national borders – increasingly towards nearby European countries that offer both geographical proximity and cultural diversity. Programmes such as Erasmus+ have significantly lowered barriers by providing financial support and offering opportunities for short-term academic mobility within the region, with Spain emerging as one of the leading destinations for Erasmus+ participants.

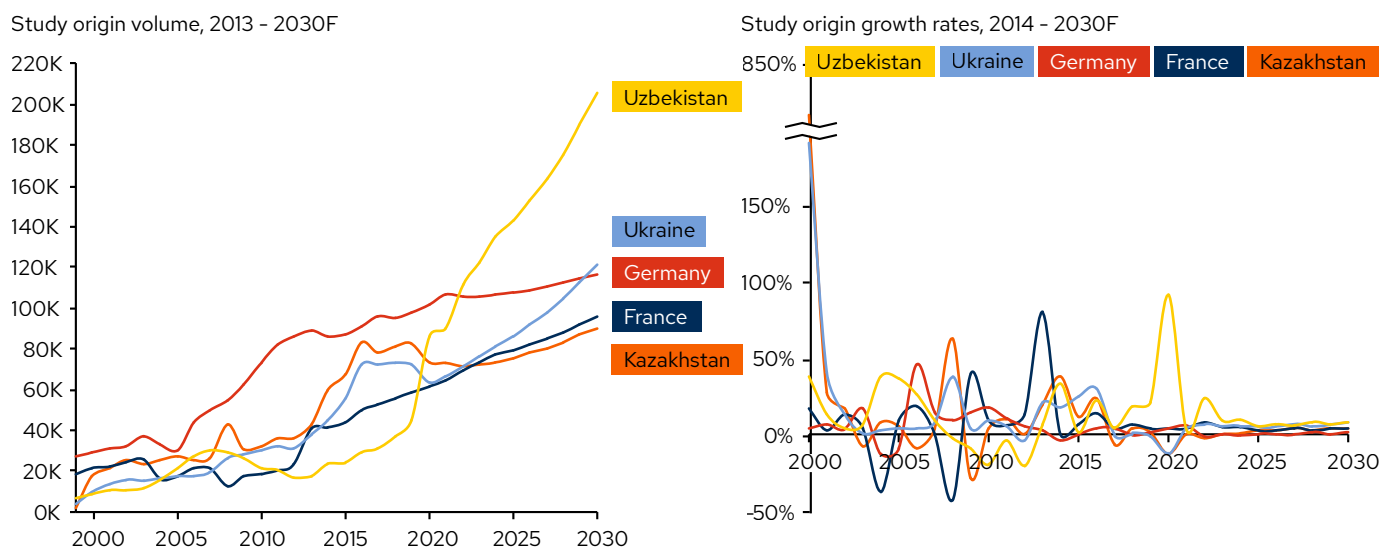
The COVID pandemic accelerated new trends in student mobility, with Uzbekistan emerging as a key player. In 2020, student numbers from the country surged by over 90%, and it has since remained a leading source for intra-European mobility.

Of the top destinations, Germany is the fastest growing, with Türkiye and Austria accounting for nearly 10% of its international student body in 2024. France, another key destination, is expected to see steady growth, with Italian students making up the highest share of its international student population.

Additionally, the European Council has set ambitious targets aimed at boosting youth learning and training opportunities. By 2030, 23% of higher education graduates are expected to gain study abroad experience – a notable increase from the 15% participation in 2022.

Sustained growth requires focus beyond short-term mobility. Moreover, scaling long-term mobility requires a renewed institutional and policy focus, ensuring equitable participation across the EU.

Figure 16. Europe student origin growth, 2000-2030F. Point estimate growth outlook



Source: QS Global Student Flows, September 2025

US and Canada

Students from the US and Canada make up a smaller proportion of Europe's full degree seeking international student population; however, their numbers are steadily increasing, driven by evolving academic preferences and economic factors. Europe remains the top destination for US students studying abroad, with countries such as Italy, Spain, France, and Germany continuing to attract strong interest.

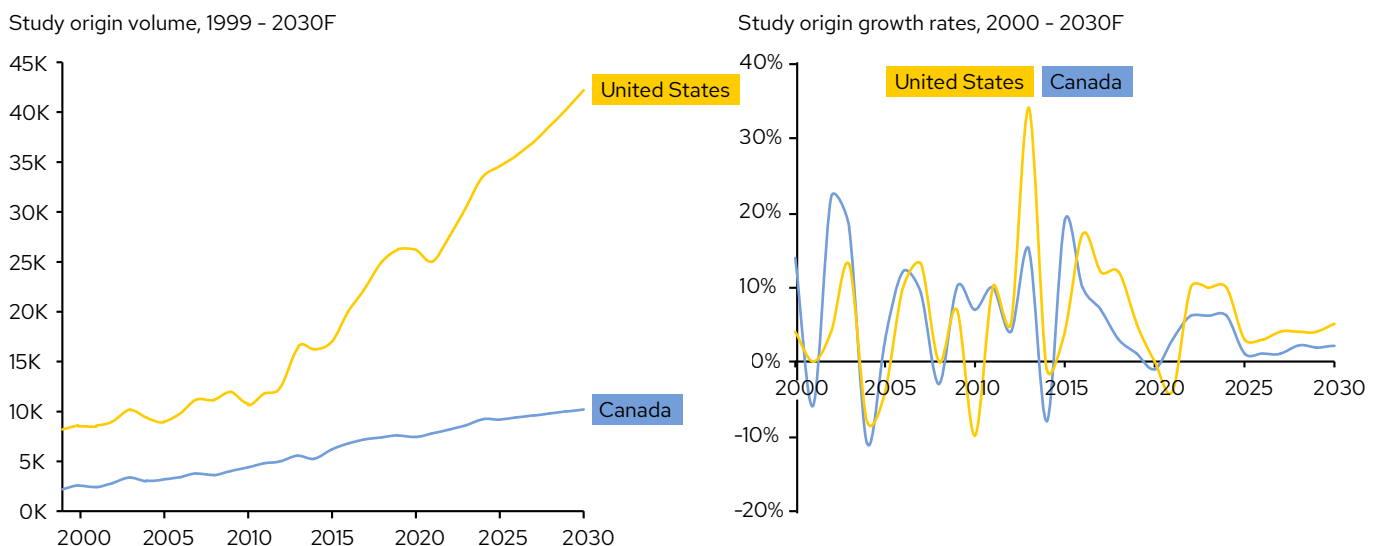
The growth of English-taught programmes across the region has lowered barriers for American and Canadian students. This, along with shorter degree durations, typically three years for bachelor's degrees and one year for master's, makes European education a compelling option. The availability of flexible, short-term academic options, such as semester exchanges, summer schools, and language immersion courses, further enhances Europe's appeal, providing valuable international experience without the commitment of a full degree.

Following the COVID pandemic, as borders reopened and study abroad programmes resumed, Europe emerged as the most resilient and attractive destination for US and Canadian students.

In the 2021/2022 academic year, Europe hosted 73% of all US international students, with 16% in Italy, 13% in Spain, and 8% in France. For Canadian students, Germany, France, and Italy also ranked among the top European destinations.

Spain, in particular, ranks third among the top study abroad destinations for US students and experienced a robust post-pandemic rebound in 2022. After significant declines in 2021 (76% for US students and 62% for Canadian students), enrolments soared. The number of US students in Spain surged by nearly 250% in 2022, while Canadian student numbers grew by over 100%. This bounce back can be attributed to the short-term students who returned after the pandemic.

Figure 17. Europe student origin growth, 2000-2030F. Point estimate growth outlook



Source: QS Global Student Flows, September 2025

Outbound trends

Study abroad

Outbound student mobility from Europe has generally followed a long-term upward trend. Before the COVID pandemic, numbers had been steadily increasing, largely driven by initiatives such as Erasmus+ and an expanding network of bilateral exchange agreements between universities.

Students are motivated to study abroad by factors such as access to high-quality academic programmes with 70% of European students prioritising high quality teaching on their courses. Some 59% prioritise an appealing culture and lifestyle in their chosen study destination and 55% look for courses which lead to their chosen career. Additionally, 27% prioritise the opportunity to improve their language skills. According to Eurostat, in 2022, nearly 9% of EU graduates participated in international study programmes, spending at least three months abroad during their degree. This represents 363,900 mobile graduates out of 4.1 million across the EU. The EU aims to increase this share to 23% of graduates with study abroad experience by 2030.

Western and Northern European countries are significant contributors, with over 120,000 German students studying abroad in 2024, followed by France and Italy. For German students, the most popular host countries in 2020 were Austria, the Netherlands, and the UK, while Spain is the top destination for temporary study-related visits. France's top destinations in 2021 were Belgium and the UK. Southern European countries, including Spain, Italy, and Greece, also showed strong participation, and Poland and Czechia were emerging as key players in Eastern Europe's growing presence in the global student market. While still a major destination, students previously bound for the UK from Europe may have chosen to study elsewhere as EU students lost Home Fee status in the 2021/2022 academic year following Brexit, thus greatly increasing the cost of study.

Destination patterns have remained largely within Europe, driven by geographic proximity, shared academic frameworks, and the credit transfer systems facilitated by Erasmus+. Programme formats are evolving as well. Short-term, credit-bearing experiences are increasingly being integrated into degree programmes, offering more flexibility and lowering financial barriers. Meanwhile, virtual and hybrid mobility, initially introduced as a pandemic necessity, are now used strategically to widen participation among students.

The COVID pandemic caused a sharp decline in outbound mobility across the continent. However, recovery has been strong – Erasmus+ reported record participation, with over 1.2 million students involved, exceeding pre-pandemic levels. Western Europe regained its position as the largest source of outbound students, led by Germany, France, and Italy. Northern European countries such as Finland and Sweden maintained high mobility rates, while Southern European countries, including Spain, Italy, and Greece, saw steady rebounds. In Eastern Europe, Poland and Czechia continued to expand their international engagement, reflecting the long-term trend of growing mobility from these regions.

Looking ahead, outbound mobility from Europe is expected to continue rising over the next five years, both within Europe and globally. Achieving the EU's "Europe on the Move" target of 23% graduate mobility by 2030 will require more than simply restoring pre-pandemic flows. Policies will need to focus on broadening access, especially for underrepresented and disadvantaged students, while ensuring that mobility experiences are closely linked to employability outcomes. Strengthening pre-departure preparation, post-return integration, and partnerships with industry will be essential for developing a mobility system that is not only larger but also more inclusive, impactful, and capable of preparing students for an increasingly interconnected world.

Transnational education

Amid rising political pressure on migration and visa policies, intense global competition, and a growing demand for international qualifications closer to home, transnational education (TNE) has become a strategic way for European universities to expand their international reach. European institutions operate more than 100 offshore branch campuses globally, which offer greater control over the quality of education. However, establishing and maintaining a strong institutional brand overseas remains costly. As a result, many universities are also turning to partnership-based models such as joint degrees and collaborative programmes with local institutions, which offer scalability and regional relevance. This shift reflects a broader move toward an outward-facing education export model, focused on delivering education across borders through branch campuses and academic partnerships, rather than relying solely on attracting international students to European campuses.

As part of the European Universities Initiative, the EU had targeted the creation of 60 university alliances by mid-2024, connecting over 500 higher education institutions across the continent. These partnerships, which are a key component of the larger Erasmus+ programme, are supported by a substantial €1.1 billion in funding. The initiative's primary aim is to develop long-term structural, sustainable, and systematic cooperation on education, research, and innovation across borders.

While EU countries differ in their models and pace of expansion, the pre-pandemic period showed strong growth in European transnational education. Student numbers increased by 60% in the four years following the Brexit referendum, excluding the three largest distance learning providers. This growth is supported by key frameworks, including the Bologna Process and the European Higher

Education Area (EHEA), which ensure degree compatibility and quality assurance for smoother cross-border collaboration.

Traditionally, while English-speaking countries dominated the TNE landscape, Germany has adopted a distinctive model that prioritises quality over scale, focusing on a collaborative approach between an institution abroad and a local partner. With around four international branch campuses, German institutions favour joint or dual degree and shared accreditation schemes developed with local institutions. The German Academic Exchange Service (DAAD) plays a central role through the provision of funding, guidance, and quality assurance mechanisms, supporting the maintenance of academic integrity and alignment with Germany's internationalisation priorities.

In contrast, France follows a blended approach. It combines state-supported initiatives with the global expansion of its institutions. While schools such as INSEAD operate campuses across Singapore, Abu Dhabi, and San Francisco, state-supported networks like the Agence Universitaire de la Francophonie (AUF) promote French-language higher education, particularly in the Middle East, Southeast Asia, and Africa. With 38 branch campuses, there are approximately 37,000 students currently enrolled in French offshore transnational education programmes.

Spain's TNE model is largely driven by private universities and business schools, many of which have extended their presence into Latin America and parts of Europe. Institutions such as the IESE Business School operate campuses in Munich, Madrid, Barcelona, São Paulo, and New York. This regional expansion is supported by shared Spanish language and cultural ties, which enhance student engagement, ease of collaboration, and overall market accessibility.

Meanwhile, Italy has integrated TNE into its broader economic and educational strategy through the National Recovery and Resilience Plan (PNRR). The plan aims to diversify and strengthen higher education provision by encouraging academic cooperation and mobility among universities and research institutions on a global scale. The IHEA Foundation, Italian Higher Education with Africa, is dedicated to advancing transnational higher education initiatives across Africa, working in partnership with African universities from the Mediterranean region to Sub-Saharan countries.

Overall, European universities display a preference for collaborative programmes over extensive physical expansion. Looking ahead, the EU's diversified and region-specific transnational education strategies place it in a strong position to adapt to the evolving landscape of global education. As students increasingly seek international credentials without crossing borders, European universities are well-aligned to sustain and expand their influence, supported by collaborative frameworks and strategic funding.

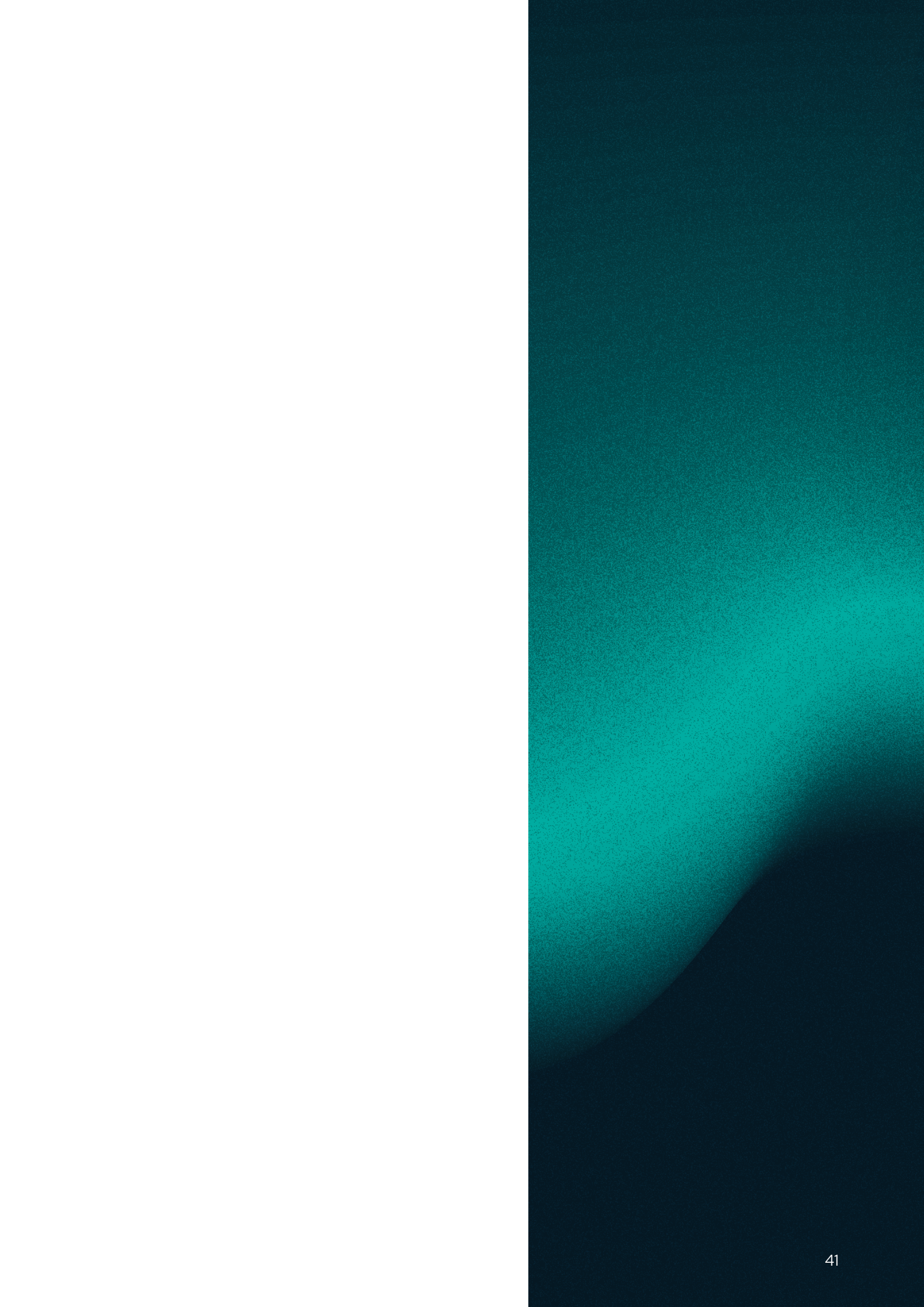
Online and hybrid transnational education

Online and hybrid transnational education (TNE) is gaining momentum across the European Union, driven by strategic policies and programmes designed to enhance flexibility, accessibility, and innovation in higher education. A key tool in this shift is the Blended Intensive Programme (BIP) under Erasmus+, which integrates short-term physical mobility with mandatory virtual learning. This model reflects the EU's deliberate move toward hybrid education, balancing the benefits of in-person engagement with the scalability of digital delivery, rather than pursuing fully online education alone.

The COVID pandemic significantly accelerated the shift from traditional, in-person mobility to a blended, digital-first approach. Before the pandemic, policies in countries like Germany favoured physical attendance, with limited fully online offerings. The crisis forced institutions and policymakers to rapidly adopt and invest in digital and hybrid learning. As a result, the EU has reinforced this strategic transition, emphasising high-quality digital education as a cornerstone of its policy framework. Programmes like Blended Intensive Programmes (BIPs) exemplify this new model, combining virtual and physical learning to ensure greater inclusivity, quality, and accessibility for students across Europe.

Unlike countries such as the UK and Australia, which focus their online TNE efforts on international markets, particularly in the Asia-Pacific, the EU is focused on intra-European mobility. This “focus” is largely facilitated by programmes like Erasmus+ and is aligned with the EU's regional integration goals. While the global landscape of online TNE is still dominated by the four Anglophone countries (UK, US, Australia, and Canada), there is notable growth within the EU. Reports indicate that the number of English-taught online programmes offered outside these countries has nearly doubled since 2019. These are largely concentrated in fields such as Business, Management, Computer Science, and IT, reflecting a growing demand for workforce-relevant, flexible learning.

Together, these developments suggest that while the EU's approach to online and hybrid TNE is evolving rapidly. With a strong policy foundation, innovative delivery models like BIPs, and growing institutional participation, Europe is positioning itself as a significant player in the global TNE landscape focused primarily on quality, inclusivity, and regional connectivity.



The three scenarios for 2030

and how they impact Europe



Regulated Regionalism

Regulated Regionalism, where geopolitical fragmentation leads to strong intra-regional mobility and emerging destinations accelerate ahead.



Hybrid Multiversity

Hybrid Multiversity, a world of blended, tech-enabled models that reshape where and how students learn, featuring a strong push towards transnational campuses.



Talent Race Rebound

Talent Race Rebound, a high-growth, globally competitive environment where nations aggressively seek international students as future citizens and workers.

Regulated Regionalism

Regulated regionalism in Europe represents a strategic and centrally coordinated approach to student mobility, balancing the regional frameworks with the autonomy of member states. Moving away from an unregulated global market, it prioritises the creation of a cohesive, internal European Higher Education Area (EHEA) while also leveraging international students to address specific regional economic and demographic needs.

Europe's model of regulated regionalism is a direct result of policies designed to integrate member states' higher education systems. The Bologna Process and its standardised degree structure (Bachelor, Master, PhD) are foundational, ensuring that academic qualifications are easily recognised across borders, enabling seamless intra-European student mobility. The Erasmus+ programme serves as a financial and administrative mechanism, offering grants and structured pathways for students to study or train in another EU country. These frameworks create a transparent, predictable environment for mobility within the bloc, reducing barriers and encouraging a self-contained flow of talent.

While major academic hubs like Germany and France remain popular, regulated regionalism is also driving growth in emerging destinations. Countries such as Spain, Poland, and Hungary are increasingly attracting students from both within and outside the EU due to their lower tuition fees and cost of living.

Furthermore, Europe is becoming more intentional about attracting and retaining international students to fill specific workforce gaps. New policies, such as the EU Talent Pool and the Blue Card, aim to streamline migration pathways for highly skilled graduates. This signals a strategic shift from simply attracting students for their economic contribution to aligning student mobility with regional labour market needs. Enhanced visa scrutiny and enrolment management ensure that mobility supports genuine academic goals and contributes to long-term workforce planning, rather than being solely market-driven.

This scenario reflects a future where student mobility is not unrestricted, but intentionally guided. Europe remains a major destination, but enrolments are increasingly selective, transparent, and aligned with broader national capacity and regional development goals.

Hybrid Multiversity

This scenario outlines a model where international students engage in a blended learning approach, starting their education online or in their home countries before travelling to a European country for a shorter, focused in-person experiences. These onshore experiences are often linked to hands-on training, internships, or specialised language programmes.

Under this model, students begin their academic journey remotely, leveraging online platforms or local partner universities within their home countries. Courses are designed to meet the academic standards of the host European university, with robust credit transfer systems ensuring a seamless transition between the offshore and onshore phases of study. Universities formally recognise micro-credentials earned during the initial stages, allowing students to build their qualifications progressively. The final stages of study in Europe could include capstone projects or industry-linked experiences to facilitate a smooth transition into the workforce.

The Erasmus+ programme would evolve beyond its traditional focus on physical student exchange to support a more flexible and integrated system of transnational education. To support this new model, European universities would actively adapt their campuses and digital infrastructure. Physical campuses would be reserved for activities that require hands-on learning, such as laboratory work, design studios, or direct employer engagement. At the same time, digital infrastructure would be significantly strengthened to provide a high-quality, immersive learning experience for students beyond Europe.

The Hybrid Multiversity scenario is particularly attractive for European countries as it can help manage migration and infrastructure pressures while maintaining global academic engagement. By offering qualifications through universities and partnerships in countries across Africa, Asia, and Latin America, Europe can build a pipeline of skilled individuals while generating revenue and fostering long-term academic and cultural ties. This model offers a more affordable and flexible alternative to traditional full-onshore degrees, making European education more accessible to a wider pool of international talent. However, widespread adoption would require collaborative efforts among EU member states to align visa and education frameworks to support this innovative approach.

Talent Race Rebound

Europe would increasingly view international education as a strategic tool for addressing its significant skills shortages and demographic challenges. Consequently, Europe is redefining international education as a targeted pathway to attract and retain highly skilled talent in priority sectors, positioning students as future contributors to the EU workforce and economy.

Under this model, European countries would adjust their policy settings to adopt a more targeted approach. While general student intake might be managed more closely, exemptions and streamlined processes would be provided for priority groups, such as those in high-demand fields like IT, healthcare, and engineering.

The EU's Blue Card Directive, which offers a residence and work permit for highly-qualified non-EU citizens, would be a key mechanism in this strategy. The policy could be further streamlined to be more flexible, with criteria aligning more closely with specific national workforce needs. For example, countries with acute shortages of engineers could offer a lower salary threshold or faster application processing for engineering graduates.

To better align student pathways with labour market needs, post-study work rights would be redesigned to favour graduates entering sectors with critical shortages. The EU's Talent Pool initiative, an online platform to match non-EU job seekers with employers, would be integrated with the education system. International graduates with European qualifications and local work experience in a high-demand field would earn additional points in a potential EU-wide or national-level migration points system. This creates a clear and appealing pathway for students from countries where international study is seen as a route to long-term stability and economic opportunity.

By positioning international education as a direct pipeline for skilled migration, Europe can proactively address its demographic challenges and ensure it remains competitive in the global race for talent.

Drivers for growth

Growth looks promising for Europe through to 2030, but how can universities recruit even more effectively?

- Focusing on labour market dynamics
- Build (or re-build) reputation

Labour market dynamics

How universities can beat the forecast

Labour shortages and the skills mismatch

In recent years, labour shortages have become increasingly well documented in a number of in-demand occupations spanning across Europe, which in turn have caused a multitude of issues for local employers. The need to address these issues cannot be overstated, as according to a recent survey, 63% of small and medium-sized businesses in the region now cannot find the talent they require¹. Higher education institutions have a critical role to play in resolving this with their graduates, as well their ability to attract talent from outside of Europe which has been identified as a key action point to stimulate the region's growth potential. Harnessing the potential of inbound student flows will be a crucial factor in supporting

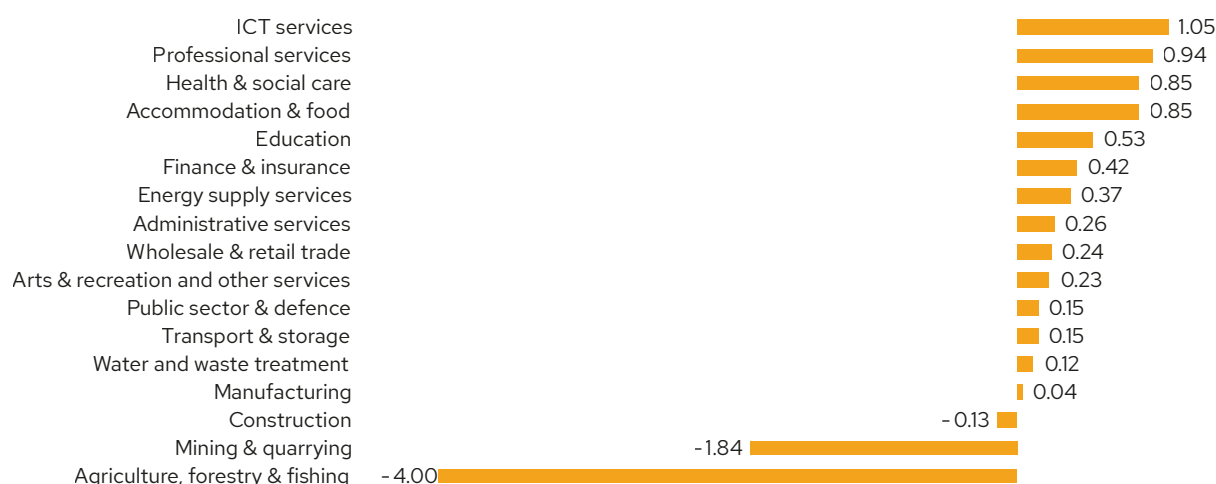
European companies to close these skills gaps and support the region's long-term prosperity.

While labour shortages have been observed in multiple sectors, the anticipated economic transition in the coming years is likely to accentuate these shortages in specific industries. According to a recent report from the European Centre for the Development of Vocational Training, the sectors projected to experience the biggest employment growth up to 2035 are ICT Services, Professional Services and Health and Social Care². It is vital that institutions pivot their curricula development to meet this demand and equip graduates with the skills needed by employers.

¹ Tackling labour and skills shortages in the EU - European Commission

² Future annual employment growth | CEDEFOP

Figure 18. Employment growth in EU: Annual % growth in 2022-2035

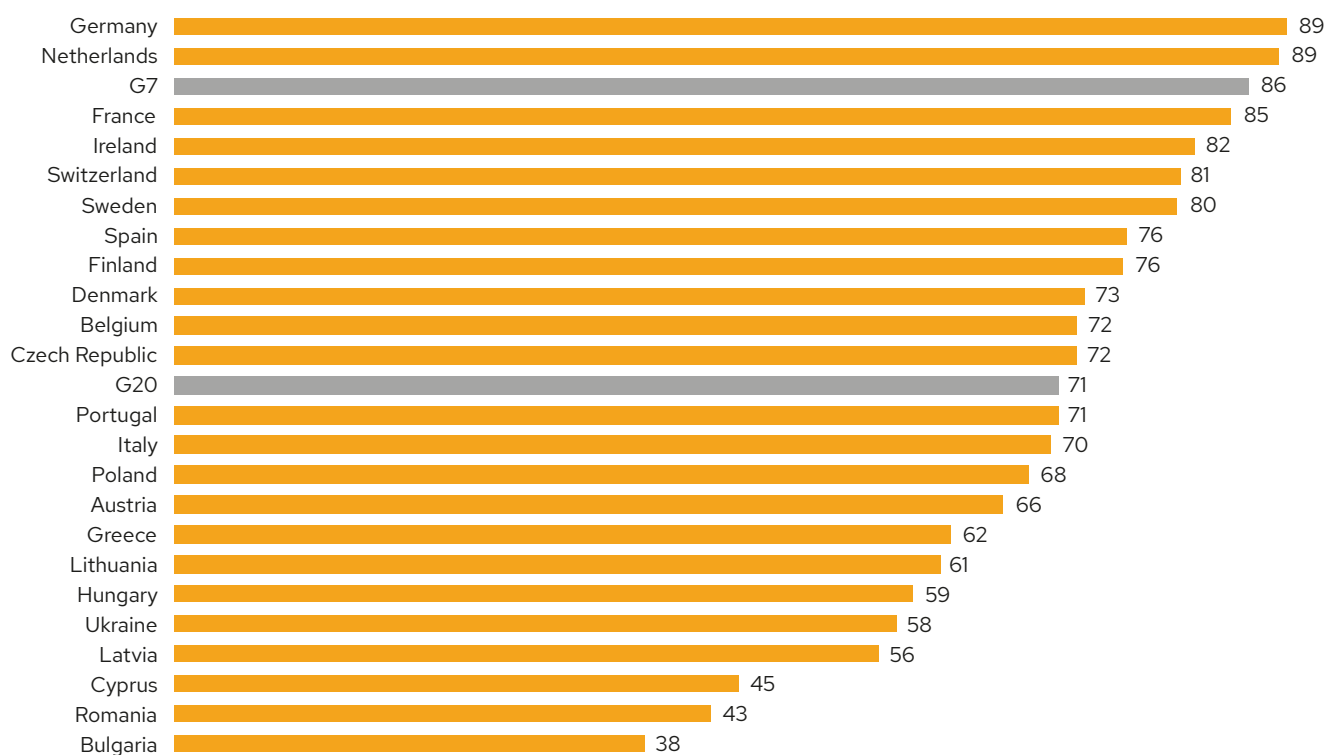


Source: European Centre for the Development of Vocational Training

The effects of these labour shortages have already started to impact the market dynamics of the region. As the QS World Future Skills Index indicates, several European countries struggle to equip graduates with the skills they require to meet the needs of employers today (Figure 19). While Germany, the Netherlands and France all place within the top 10 countries globally for the alignment of graduate skills with the needs of the labour market, several European countries score below the G7 and G20 average. If left unchecked these trends pose a significant risk to the region's global competitiveness and will hinder its ability to adapt through changing economic conditions.

International students have a critical role to play in driving productivity and supplementing these workforce needs. While several examples of this can already be found across the region, a recent report from the European Labour Authority highlights Spain, where in 2022 new migration laws helped facilitate the integration of foreign students into the labour market by allowing them to work whilst studying. These changes helped increase the proportion of migrant workers in Spain from 14.7% to 17.9% over a two-year period. The report acknowledges the policies could benefit from further refinement to orientate workers towards occupations with widespread shortages, but it still serves as an example of the ability for international students to address labour market imbalances.

Figure 19. Skills Fit indicator
Europe (normalised score out of 100)



Source: QS World Future Skills Index 2025

Universities in Europe need to respond in kind by ensuring graduate outcomes form a central tenet of their recruitment strategies and embedding employability into their educational offerings. The demand from students is already there, as future career considerations are one of the top four most important priorities for students when choosing what course to study, according to the QS International Student Survey. This focus on graduate outcomes is especially prominent in East and South Asia, two regions which will be critical in dictating future international student flows to the region and reiterates the need for universities to pivot their student recruitment strategies.

In order to close these skills gaps, institutions must work in close collaboration with industry to align their curricula development. By aligning their recruitment with those sectors facing the largest skill shortages, institutions emphasise their focus on employability and in doing so maximise their conversion.

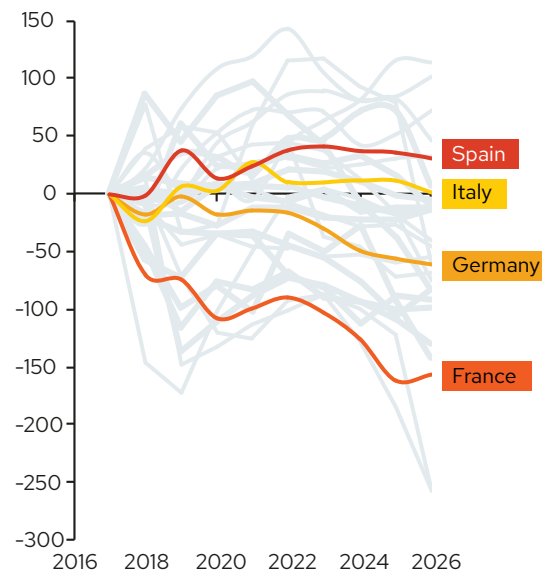
International student trends

Using insights into what students
want to future-proof your strategy

Reputation driving student decision-making

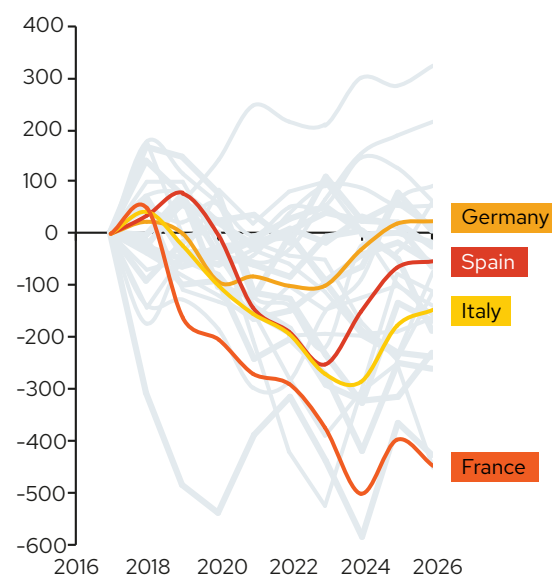
While the Global Student Flows forecast for the major continental European destinations is relatively positive, there are possible concerns on the horizon. Students are increasingly looking towards reputation and career outcomes when making study decisions; at the same time, the Academic and Employer Reputation rank of these countries is plateauing, or, in some cases, rapidly declining (Figure 20 and 21). The median Employer Reputation rank of French institutions has dropped by nearly 500 positions between 2016 and 2026.

Figure 20. Change in median Academic Reputation rank since 2017



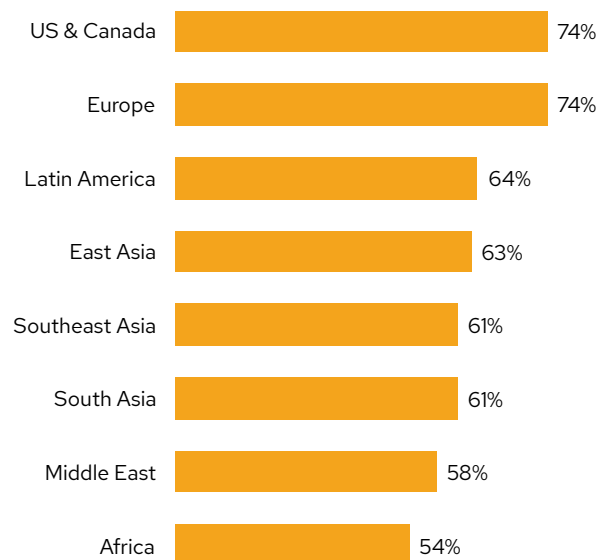
Source: QS World University Rankings

Figure 21. Change in median Employer Reputation rank since 2017



Source: QS World University Rankings

Figure 22. Importance of reputation to students when choosing a university



Source: QS Global Student Flows, September 2025

The majority of all students, regardless of source market, see reputation as important when choosing a European university (Figure 22). For the markets that send the most students to Europe, such as Latin America, East Asia and Southeast Asia, over 60% of students use reputation as a guide. This heightens the risk facing institutions in France, Germany, Italy and Spain as they battle with declining and plateauing reputation. This is particularly alarming when Figure 20 and 21 show that this reputational decline has not been seen across Europe, with many nations managing to improve their average Academic and Employer Reputation.

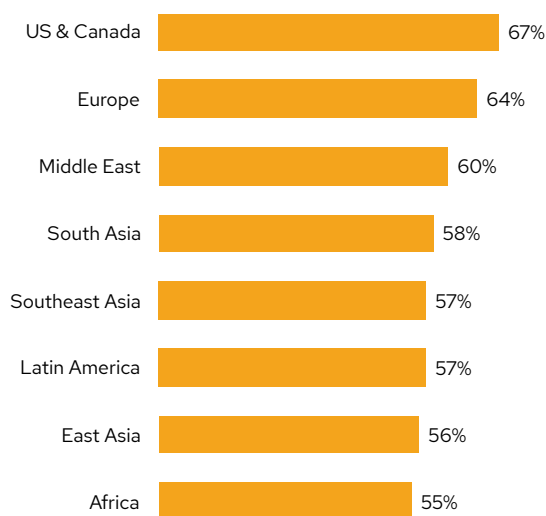
With heightened competition from other European countries, and students increasingly looking for reputable institutions that improve their employment prospects, France, Germany, Italy and Spain will need to build their reputation and outperform their European peers to mitigate risk.

Employability is a vital consideration for prospective students

Students are increasingly focusing on post-study employment outcomes when considering international study. Regardless of source region, the majority of students looking to study in Europe say that the ability to learn new skills is an important career consideration for candidates (Figure 23). Prospective students see their time at university as an ideal time to upskill and articulate the value they can add to employers.

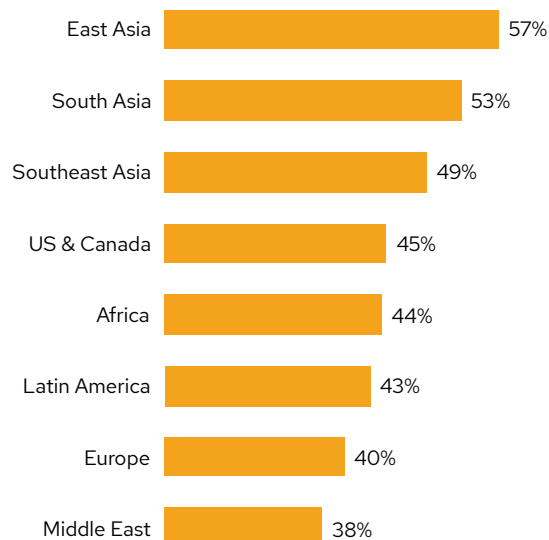
Information about work placements and links to industry was identified as useful when making study decisions by 43% of students. This information was deemed more useful by students from East, South and Southeast Asia (Figure 24). With 640,000 students forecast to study in Europe from these regions, it is key European institutions get this messaging right, and focus on the metrics that matter to students.

Figure 23. Career considerations when choosing a course
% of students selecting "It allows me to learn new skills"



Source: QS Global Student Flows, September 2025

Figure 24. Marketing communication preferences
% of students selecting "Information on work placements and links to industry"



Source: QS Global Student Flows, September 2025

Strategic imperatives for 2030

The three scenarios outlined in this report urge higher education institutions across Europe to consider how world events, economic fluctuations, demographic shifts, technological advances and the world of work may affect the role and achievements of universities.

Without scenario-planning, the report warns that institutions risk losing their important role in civic society, relevance and attractiveness among students, academia and employers.

Build capacity:

As we set out in our strategic challenges, there is a risk that demand from international students will outstrip supply across popular study destinations in Europe. Housing costs and availability have already proven to be a challenge in some destinations, and this could limit future growth. Some 63% of prospective students interested in studying in Germany for example prioritise affordability, QS research has found. Transnational education options, such as joint programmes, offer an opportunity for European institutions to increase capacity and reach more students in their home countries without the associated financial or environmental costs around mobility. In the Hybrid Multiversity scenario, students would also be able to begin their academic journey remotely and micro-credentials and new forms of study could allow students to build their qualifications progressively or through lifelong learning opportunities.

Align education with labour market gaps:

Germany is the only country in continental Europe to feature in the top five countries in the QS World Future Skills Index. This suggests that institutions elsewhere in the world are more effectively equipping graduates with the future skills employers are seeking. This will be even more important if our Talent Race Rebound scenario materialises and countries become increasingly competitive to attract the most talented learners and innovators. Currently, some 63% of SMEs in the region struggle to find the talent they require. Being able to forecast labour market dynamics can help universities to close skills gaps and support the region's long-term prosperity.

Rebuild reputation:

Institutions in France, Germany, Italy and Spain have not kept pace with global peers in growing their reputation among both employers and academics. While campuses across the continent enjoy the benefits of intra-European mobility, institutions can do more to attract non-EU students. Students from South Asia are attracted to Germany's affordable options and historical ties – such as between North Africa and France – make Europe destinations of choice among some groups of students. But targeting new regions, countries or cities will bring the benefits of having broader international cohorts on European campuses. The key to doing this in specific regions is by being able to demonstrate return on investment to prospective students or that quality compares much more favourably to peers.

Methodology

Global Student Flows

The Global Student Flows (GSF) initiative comprises three core components: QS' *Open Source Framework for Global Student Flows*, a proprietary *Flow Mapping and Analytics Technology*, and a *Scenario-Based Forecasting Methodology* designed to simulate over 4,000 discrete source-to-destination flows. Together, these instruments offer a comprehensive, 360-degree view of the global outlook for international student mobility.

Open source framework

The GSF framework integrates both qualitative and quantitative research within an open-source structure that supports the historical analysis and future forecasting of international student flows. The framework organises 15 core drivers of mobility into three overarching categories - push, pull, and disruption factors. These drivers form the analytical basis for assessing patterns in student movement and are reviewed and refined annually through expert consultation.

The qualitative research process is informed by extensive interviews with global experts, including economists, policy leaders, and institutional decision-makers. These contributors provide deep contextual insight

into specific country-to-country flows, policy settings, and sectoral trends. Quantitative analysis is anchored in both historical datasets and current indicators, supported by HolonIQ by QS' proprietary global flows model. This model employs advanced analytics to simulate multi-factor, high-dimensional data across more than 4,000 unique international student flows.

By combining structured expert insight with data-driven modelling, the GSF framework delivers a robust, adaptive foundation for understanding the forces shaping global student mobility - past, present, and future.

Push factors	Pull factors	Disruption factors
Drivers of outbound mobility from source countries	Determinants of destination market attractiveness	Drivers of volatility and alternative mobility scenarios
Demographics	Academic quality	Geopolitical factors
Economic conditions	Post-graduation prospects	Place-based risks
Loans & scholarships	Affordability (inc. FX)	Capacity constraints
Domestic alternatives	Recruitment infrastructure	Hybrid programmes
Risk factors	Safety and security	Online learning

Push factors: Drivers of outbound mobility from source countries

Push factors refer to the underlying conditions within a student's country of origin that influence the decision to pursue education abroad. These drivers encompass a broad range of demographic, economic, educational, and geopolitical dimensions that collectively shape outbound mobility patterns.

Demographics

This factor analyses population trends and structures within source countries, including youth population growth, urbanisation, and educational attainment levels. Demographic pressures, such as a growing tertiary-aged population, are often strong predictors of increased outbound student mobility.

Economic conditions

The economic context of the source country directly impacts the capacity of individuals to finance international study. A slow economy, low gross domestic product (GDP) per capita,

poor income distribution and overall household wealth can all motivate students to seek more prosperous environments abroad.

Loans & scholarships

The availability of financial support mechanisms such as scholarships, student loans and private funding options plays a significant role in enabling students to pursue study overseas. These instruments help mitigate affordability constraints and expand access.

Domestic alternatives

This factor assesses the quality, capacity, and perceived value of domestic higher education offerings. When local institutions are unable to meet student expectations, the likelihood of outbound mobility increases.

Risk factors

Geopolitical and geo-economic factors, and the environmental stability of a source country can reduce the attractiveness of remaining in-country, and contribute to students' aspirations of studying abroad.

Pull factors: Determinants of destination market attractiveness

Pull factors encompass the characteristics of destination countries that enhance their attractiveness to prospective international students. These include academic reputation, employment outcomes, cost, recruitment infrastructure, and overall safety and wellbeing. Together, these factors influence a student's decision to select a particular destination.

Academic quality

Academic quality refers to the presence of highly ranked universities and globally recognised academic programmes.

Post-graduation prospects

This factor examines the availability and attractiveness of work opportunities. It includes the accessibility of internships, co-operative education programmes, and post-study employment pathways, especially those aligned with immigration or residency options.

Affordability (inc. FX)

Affordability encompasses the total cost of studying and living in the destination country. This includes tuition fees, living expenses, and currency exchange rates. Destinations that can offer an affordable study location tend to be more attractive to prospective students.

Recruitment infrastructure

This dimension assesses the effectiveness and maturity of international student recruitment systems. It includes agent networks, application processes, and institutional outreach and support throughout the student journey.

Safety and security

Safety considerations include physical security and student wellbeing. This factor evaluates the destination's political stability, health infrastructure, crime rates, and student support services. It also evaluates the destination's inclusivity and the presence of established diaspora communities.

Disruption factors: Drivers of volatility and alternative mobility scenarios

Disruption factors encompass external events and structural shifts that introduce volatility into international student mobility patterns. These variables can either constrain or accelerate mobility depending on their scale, duration, and impact. Key disruption factors include geopolitical developments, health and security risks, infrastructure limitations, and the emergence of alternative models of international education.

Geopolitical factors

This category refers to international and regional developments that influence policy decisions in both source and destination countries. Geopolitical tensions, diplomatic conflicts, and perceptions of political instability, particularly in key destination markets, can shape public sentiment, government regulation, and ultimately the volume and direction of student flows.

Place-based risks

This dimension includes disruptions tied to specific locations or global events that affect students' ability or willingness to travel. These include pandemics, armed conflicts, civil unrest, and natural disasters, as well as logistical challenges such as temporary flight suspensions or travel restrictions.

Capacity constraints

This factor encompasses limitations within destination countries that restrict the ability to accommodate international students. Constraints may include housing shortages, visa processing delays, limited institutional capacity, or insufficient support infrastructure. Conversely, improvements in these areas may significantly enhance student mobility.

Hybrid programmes

Hybrid delivery models, combining online and in-person components, represent an evolving alternative to traditional mobility. These programmes allow students to begin or complete their studies partially in their home country, offering flexibility and reducing the need for long-term physical relocation.

Online learning

Online learning offers a full substitute for in-person study, potentially reducing demand for international travel. As digital delivery becomes more sophisticated and accepted, it presents a disruptive force to conventional student mobility models.

Mapping flows

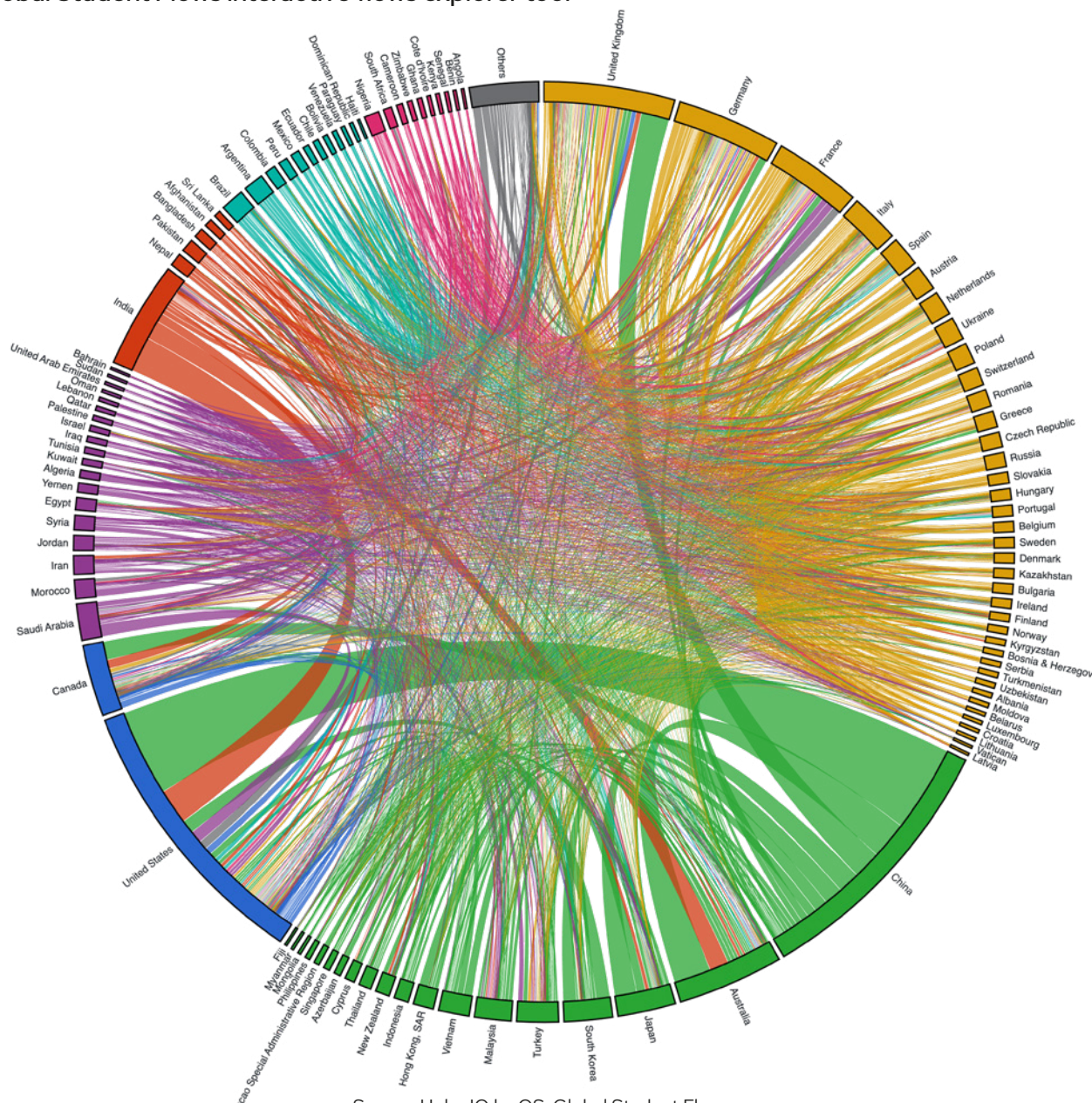
HolonIQ by QS has developed proprietary technology to map and analyse the complexity of global student mobility and cross-border flows. Each year, over seven million students travel from more than 150 source countries to study in over 100 destination countries, representing more than 4,000 unique country-to-country flow patterns.

The platform enables users to analyse over 4,000 discrete flows over time, identifying trends and patterns that inform strategic

planning, policy development, and investment decisions. The platform is designed to simplify the management, evaluation, and forecasting of international mobility and related datasets.

While the current focus of the Flows tool is on country-to-country education flows, the platform is progressively expanding to include subnational (state or province-level) and city-level resolution at both the source and destination ends.

Global Student Flows interactive flows explorer tool



Source: HolonIQ by QS, Global Student Flows

The GSF project employs a Monte Carlo simulation framework to forecast international student mobility across more than 4,000 discrete country-to-country flows. This simulation-based approach integrates probabilistic modelling with expert-informed qualitative research and quantitative machine learning to estimate future volumes under uncertainty.

As illustrated in the figure below, the forecasting model combines three core dimensions:

1. **Push factors** (source country conditions),
2. **Pull factors** (destination country conditions),
3. **Disruption factors** (external shocks and structural volatility).

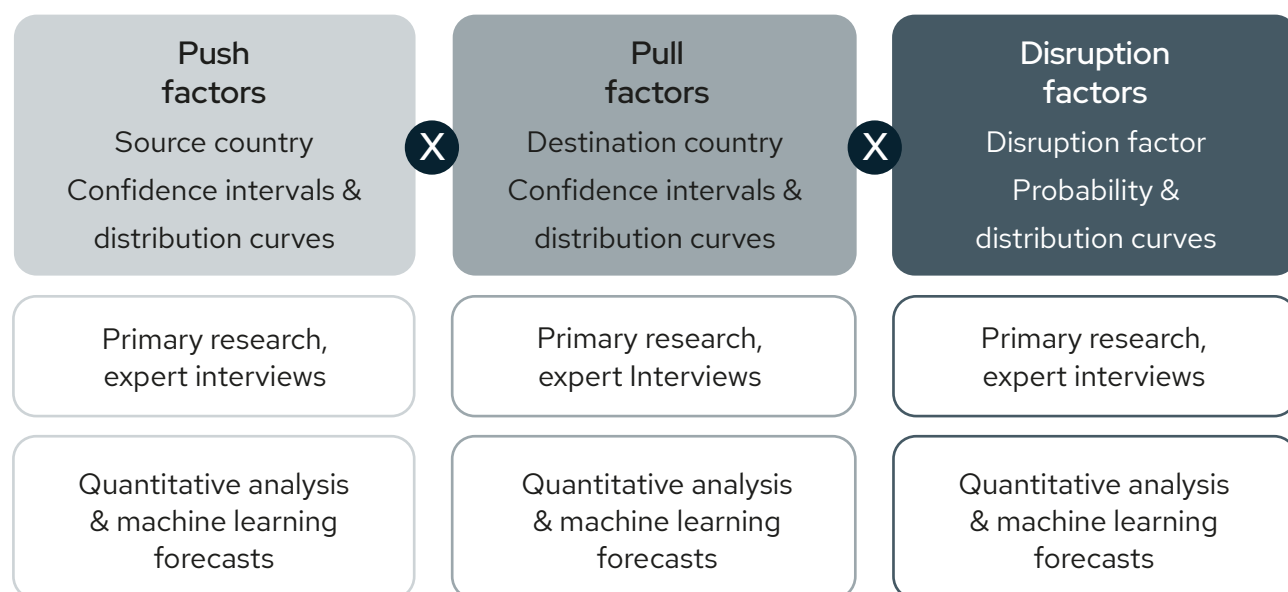
Each factor is associated with a statistical distribution and confidence interval derived from a combination of primary expert interviews and historical quantitative data. Push and pull factors each generate growth rate distributions for every source and destination country respectively, while disruption factors contribute additional probabilistic shifts in overall flow volumes.

For each simulation run, randomised values are sampled from these distributions to produce one unique realisation of global mobility. The model executes one million iterations, Monte Carlo simulations, resulting in a distribution of total international student numbers and enabling robust scenario analysis.

While it is computationally intensive to model all 4,000+ flows individually, the GSF platform utilises detailed simulations for high-priority flows, while grouping long-tail flows under aggregated probabilistic assumptions. This balance allows for both granularity and computational efficiency.

Each iteration of the simulation refines the input parameters through enhanced expert consultation and data enrichment, ensuring continuous improvement of the model. As a result, the GSF Monte Carlo engine offers a dynamic, evolving, and academically rigorous methodology for anticipating the future landscape of international education.

Global Student Flows, open-source framework



Source: QS, Global Student Flows. This work is licensed under CC BY-SA 4.0

QS International Student Survey

The QS International Student Survey offers an unparalleled view into pre-enrolled international students. The 2025 iteration draws on responses from over 70,000 students in 191 locations.

The questions in the Survey are designed to enable higher education institutions to make sound decisions on recruitment and communication strategies. Now combined with Global Student Flows data, we offer a well-rounded view of where students are choosing to study, and how they make that decision.

To understand what matters to students, we ask a wide range of questions about their pre-enrolment journey. We want to know what students prioritise when choosing a location, university and course, and we want to understand what they perceive as high-quality teaching. We ask students how their family influence decision making, and we gather data on the social media and digital channels they use to find study information.

The International Student Survey also benefits from its longevity – 2025 is our 13th edition. The consistency in our questioning allows us to see how students' answers change over time, and predict future trends and shifts. Its yearly format allows us to add new questions to get a snapshot of student perception. Over the past three years, we've gathered crucial data on transnational education, sustainability and Generative AI.

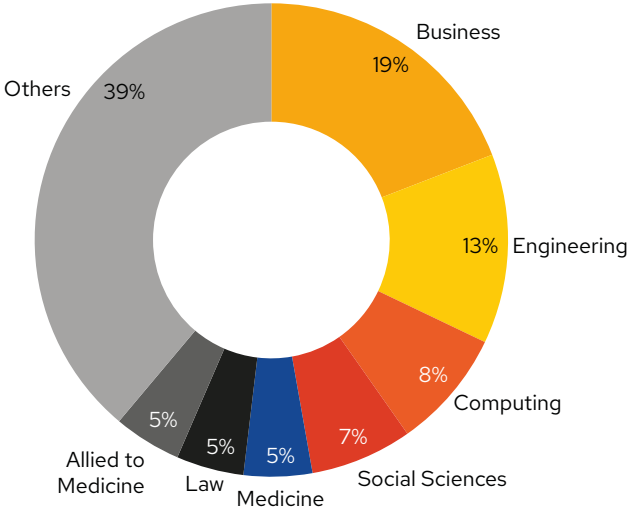
The International Student Survey's robust methodology ensures we truly represent the perception of pre-enrolled international students. Respondents for the International Student Survey are collected in partnership with global universities. This year, we partnered with 146 universities globally, who were invited to share the Survey with their own prospective international students.

Fieldwork for the Survey was conducted between 6 January and April 7 2025, via Qualtrics, an online survey management platform. The Survey contains 50 unique questions, covering a range of topics relating to prospective student decision making, from their study background to their priorities, marketing communication preferences, through to their principal information sources, career aspirations, and post-study plans.

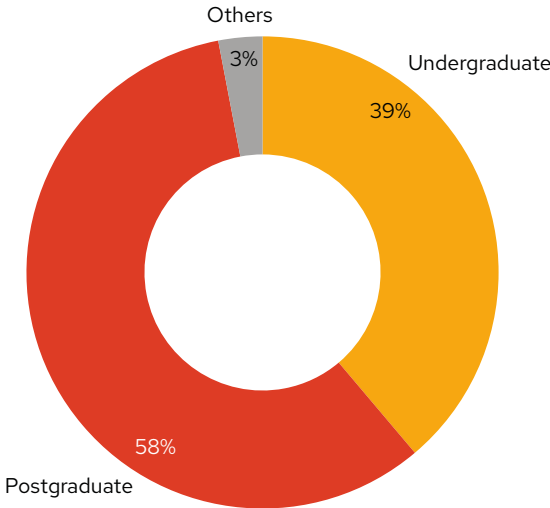
The 2025 iteration of the Survey also contains questions on candidate perceptions of branch campuses, scholarship preferences and opinions on tuition fees. Each institution who took part received a tailored benchmarking report detailing the results of their own prospective students.

International Student Survey
respondent demographics

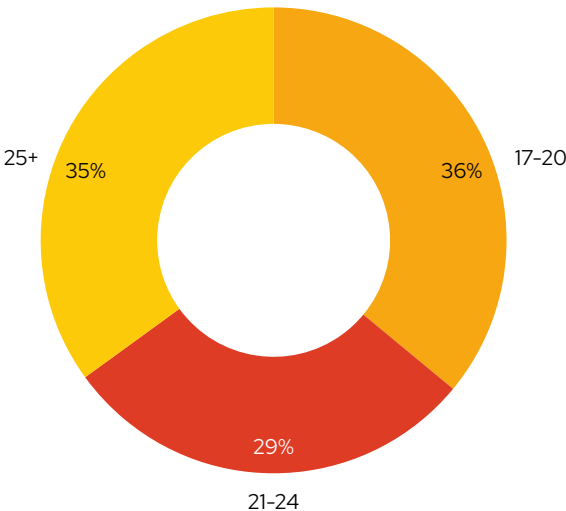
Subject preference



Study level



Age



Source: QS Global Student Flows, September 2025

Sign up for the
QS International
Student Survey
2026



Sources

The Global Student Flows model is built on a diverse and authoritative foundation of international data sources, ensuring high-quality, representative, and up-to-date insights into global student mobility. Drawing from multilateral agencies, national governments, statistical bureaus, and specialised education bodies, the model integrates both inbound and outbound mobility data across all major world regions. These sources reflect the latest available figures on enrolments, visas, migration, scholarships, and institutional capacity, and are harmonised to support robust forecasting and scenario analysis.

Key sources include:

UNESCO Institute for Statistics, 2023

World Bank Education Statistics, 2021

OECD, 2022

Eurostat, 2023

IOM Migration Data Portal, 2022

IIE Project Atlas, 2024

All India Survey on Higher Education (AISHE), 2021/22

Australian Government, Department of Education, 2023

Belgium Federal Public Service for Education, 2023

Campus France, 2023/24

Council of Higher Education (YÖK), 2022

Department of Higher Education and Training, South Africa, 2022

Department of Home Affairs – Australia Student Visa Data, 2024

Education Bureau, The Government of Hong Kong Special Administrative Region of the People's Republic of China, 2023

Education Malaysia Global Services, 2024

Education New Zealand (ENZ), Government of New Zealand, 2024

ETH Zurich, 2023

Federal Ministry of Education and Research (BMBF), 2024/25

Federal Ministry of Education, Science and Research, Austria, 2023

General Statistics Office of Vietnam (GSO), 2023

Government of Canada, 2023

Higher Education Commission (HEC), Pakistan, 2023

Higher Education Statistics Agency (HESA), 2022/23

Hungarian Central Statistical Office (KSH), 2022

Immigration, Refugees & Citizenship Canada (IRCC), 2023

Institute of International Education (Open Doors), USA, 2022/23

Japan Student Services Organization (JASSO), 2024

Ministry of Education, Argentina, 2023

Ministry of Education, Brazil, 2022

Ministry of Education, China, 2021

Ministry of Education, Columbia, 2023

Ministry of Education, Ghana, 2021

Ministry of Education, Singapore, 2023

Ministry of Education, South Korea, 2024

Ministry of Education, UAE, 2021

Ministry of Education & Science, Czech Republic, 2022

Ministry of Education and Science, Poland, 2023

Ministry of Education and Science, Uzbekistan, 2023

Ministry of Higher Education & Scientific Research (MESRS), 2025

Ministry of Higher Education, Morocco, 2021

Ministry of Higher Education, Saudi Arabia, 2022

Ministry of Higher Education, Science and Technology, Indonesia, 2023

Ministry of Higher Education, Tunisia, 2021

Ministry of Science & Higher Education, Russia, 2022

Ministry of University and Research (MUR), Italy, 2023

Ministry of Universities, Spain, 2022/23

National Universities Commission, Nigeria, 2020

Norwegian Directorate for Higher Education (HK-dir), 2022

Nuffic, 2023/24

Philippines Commission on Higher Education (CHED), 2023

Portugal Directorate - General for Education and Science Statistics, 2023

State Secretariat for Education, Research and Innovation (SERI), 2023

Statistics Canada, 2022/2023

Statistics Finland (Tilastokeskus), 2023

Statistics Norway (SSB), 2023

Statistics Sweden (SCB), 2023

Statistisches Bundesamt (Destatis), 2024/25

Student and Exchange Visitor Information System (SEVIS), 2023

Sub-Directorate of Information Systems and Statistical Studies (SIES), 2022/23

Swedish Higher Education Authority (UKÄ), 2022

Ukraine State Center for International Education, 2023

University Grants Commission, Bangladesh, 2023

Wissenschaft weltoffen, 2023/24

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