International student mobility from Russia, Eastern Europe, Caucasus, and Central Asia to the UK: trends, institutional rationales and strategies for student recruitment

Research report

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Executive Summary

This report examines degree-mobility from Russia, Eastern Europe (Belarus, Estonia, Latvia, Lithuania, Moldova, Ukraine), Caucasus (Armenia, Azerbaijan, Georgia), and Central Asia (Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan) to the UK with regard to trends, rationales, and strategies for student recruitment employed by UK higher education institutions (HEIs).

The main audience for this report are representatives of the UK HE sector and the UK government. The report will also be of interest to governments, education institutions, students and families in former Soviet countries.

The findings are based on the analysis of OECD, UNESCO-UIS, and EUROSTAT (OUE) survey data on international degree-mobility, HESA data on international student enrolment figures at UK HEIs, as well as the qualitative analysis of semi-structured interviews with international officers/admissions officers at 14 UK HEIs that were sampled systematically using a maximum variation approach.

Over the last two decades, UK HEIs have seen an almost twenty-fold increase in the number of degree-mobile students from Russia, Eastern Europe, Caucasus, and Central Asia, with approximately 15,555 students from the region enrolled at UK HEIs during the most recently recorded academic year 2013-14.

The main countries of origin (>500 students per year) are Lithuania (4,807), Russia (3,676), Latvia (1,814), Kazakhstan (1,486), Estonia (1,149), Ukraine (975), and Azerbaijan (748).

The UK is currently the most popular study destination for degree mobile students from Lithuania, Latvia, and Estonia. The UK is also among the eight most popular destinations for degree-mobile students from Kazakhstan, Russia, Azerbaijan, and Armenia.

In 1994-2014, the majority (63%) of degree mobile students from Russia, Eastern Europe, Caucasus, and Central Asia studied for their first degree, while 24% studied for a masters degree, and 6% for a doctorate.

The most popular subject areas for mobile students from Russia, Eastern Europe, Caucasus, and Central Asia have been business and administrative studies and social, economic and political studies.

UK HEIs recognise four rationales for student recruitment from former Soviet countries: economic, socio-cultural, academic, and political. An economic rationale emerged as the key rationale. All interviewees demonstrated a strong awareness of the marketisation of the UK HE sector and the revenue that international students generate in the context of the consistently decreasing funding from the government and the business sector.

Three types of social and cultural contributions of students from Russia, Eastern Europe, Caucasus, and Central Asia emerged from the interviews: active participation in the non-academic aspects of university life, increasing diversity on campus and thereby

preparing students for life and work in a globalised world, and contributing to the development of a global mind-set within local communities.

Most of the interviewees considered the students from Russia, Eastern Europe, Caucasus, and Central Asia to be highly educated, academically strong, and well-motivated.

Educating students from abroad was viewed by the majority of interviewees as a key mechanism for building more and better quality links with other countries to ensure global peace and prosperity. This was often achieved through students' political activism on campus, alumni that act as ambassadors, and the promotion of British cultural values.

There was a perception that there exists a diversity of views on international student recruitment within the government. The Department for Business, Innovation & Skills and the Foreign and Commonwealth Office were regarded by most interviewees as interested in attracting increasing numbers of academically excellent students from all over the world with a view to strengthening the UK economy and building cultural, political, and diplomatic links with other countries.

In the perceptions of the interviewed HE representatives, the Home Office tends to view international students as an immigration challenge that requires better control, as manifested in the existing UK visa regulations. All interviewees viewed visa regulations for international students as a serious impediment to student recruitment.

Almost all interviewees argued that students from this region are highly unlikely to choose to enter the UK HE sector for the purpose of future migration. Interviewees were often under the impression that students from former Soviet countries tended to keep close links with their home countries while in the UK and aspire to go back and contribute to their countries of origin.

Despite the fact that former Soviet countries are not the top priorities for UK HEI international offices, most interviewees indicated that they are working with a number of these countries – in particular, Russia, Kazakhstan, Ukraine, and Azerbaijan - to retain and possibly expand their recruitment figures.

The recruitment approaches used in the region did not tend to differ from approaches used in other international settings. These approaches included: country visits, recruitment via agents, working with schools within the countries of interest, as well as in the UK/EU, customer relationship management, alumni engagement, and country-specific scholarships.

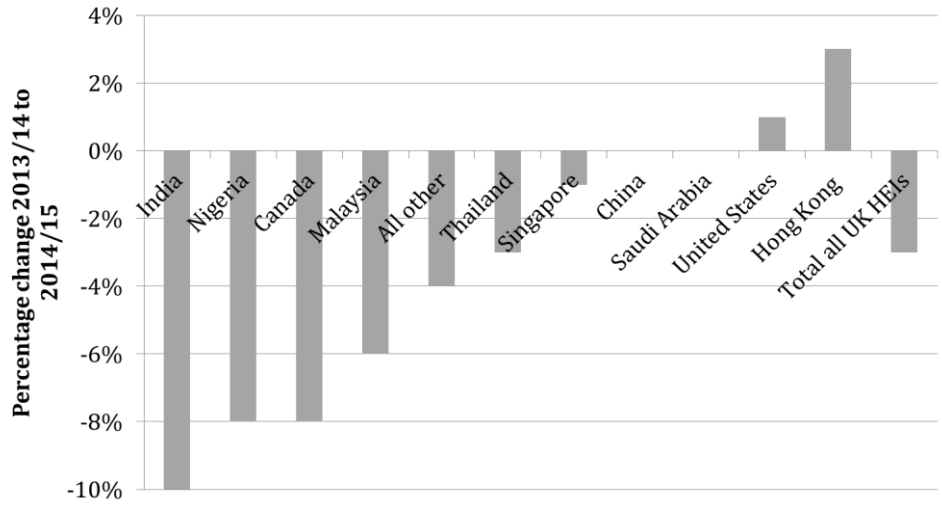
Introduction

Within the EU, the UK higher education sector attracts the largest volume of all international degree-mobile students (OECD, 2015a; UNESCO, 2014a). During the most recently reported academic year 2013-14, the country hosted a total of 436,545 degree-mobile students (HESA, 2015a). The proportion of students choosing to study in the UK has been rising consistently since 2000 and its share of the global international student market has expanded more than the share of any other OECD country (OECD, 2015b).

International student recruitment became a UK national priority in the early 1980s, following the introduction of full-cost tuition fees in 1979 (Belcher, 1987; Walker, 2014). International students in England contribute £3.6 billion to the HE sector through tuition fees. This figure is expected to reach £4.6 billion by 2017-18 (HEFCE, 2016). The UK HE international Unit (IU)[1] recognises the long-term value of international students to HEIs, the UK economy and soft power more broadly (IU, 2015).

The number of overseas students in the UK has plateaued since 2010, followed by a very slight increase in 2013-14 and the slight decline in 2014-15 (HESA, 2015b). This happened in the context of the global market for international students exhibiting significant signs of growth and the UK's main competitors witnessing increases in the numbers of foreign students. Six of the UK's top ten recruitment markets registered declines in 2014-15, with only Hong Kong and the USA showing small increases (Figure 1). Overall, in 2014-15, the number of first-year non-EU students declined by 3% (HESA, 2015b).

Figure 1. Percentage change of non-EU first-year enrolments (2013-14 to 2014-15)



Source: own calculations based on HESA (2015b) data

[1] The IU represents the UK HE sector. The IU provides analysis on all aspects of HE internationalisation and is funded by Universities UK, GuildHE, the Higher Education Funding Council for England, the Higher Education Funding Council for Wales, the Scottish Funding Council, the Department for Employment and Learning (Northern Ireland), and the Quality Assurance Agency.

The UK is currently the second most popular EU destination for degree-mobile students from Eastern Europe (Belarus, Estonia, Latvia, Lithuania, Moldova, Ukraine), Russia, Caucasus (Armenia, Azerbaijan, Georgia), and Central Asia (Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan). Based on the interview data and the literature overview, this may be linked with the strong reputation of UK higher education and of selected institutions in particular, to linguistic access and the use of English as the medium of instruction, diaspora links, employment opportunities and earning potential after graduation, the appeal of living in the UK and London in particular, knowledge and awareness of the UK as a host country and the perceived quality of life.

Over the past 15 years, 113,941 students from the region have been studying for an undergraduate or postgraduate degree at a UK HEI. In the most recently reported academic year 2013-14, about 4% (15,555) of the UK-based international students came from former Soviet countries (HESA, 2014; UNESCO, 2016a).

Within the nascent field of international student mobility, research focusing on student mobility from Russia, Eastern Europe, Caucasus, and Central Asia is scarce. For most of the 20th century, these states constituted the Soviet Union, a country which sent very few students abroad. At the time of the dissolution of the Soviet Union, the constituent countries differed significantly in terms of their human and financial resources and democratic aspirations. Consequently, they chose heterogeneous pathways of political, economic, and social development, leading to dissimilar educational and labour market opportunities for young people and different patterns of student mobility. Repressive measures that the USSR had in place did not allow its citizens to travel internationally and kept international migration well below the levels that would have occurred otherwise. The dissolution of the USSR disrupted the period of isolation from world markets, with the citizens of former Soviet countries facing fewer constrains on travel and migration (Chankseliani, 2015). The end of the Cold War has been recognised as a pivotal event in global migration as it ended the period when world emigration rates were held low (Massey, 2003).

As the former Soviet countries are developing economically and are becoming more outward-looking, the volume of migration is increasing and, more students are seeking opportunities for study abroad. One UK HEI representative explained in an interview:

> Places like Russia and Kazakhstan are certainly more internationally outwardly looking than they were perhaps 20 years ago and of course, well over the last 20 years, certainly countries like Kazakhstan and Azerbaijan, on the back of economic growth, provided capital to enable students to study overseas. So that's been a big factor. (4)[2]

There is considerable variation in the enrolment figures by country of origin, with Lithuania, Russia, Latvia, Kazakhstan, Estonia, Ukraine, and Azerbaijan (Figure 3) being the largest senders.

[2] In this report, numbers in brackets represent numeric identifiers of HEIs interviewed (column one on Table 1).

The UK's international education industrial strategy points to two of these countries - Russia and Kazakhstan - as important source countries for student recruitment. Specifically, the industrial strategy document identifies Russia as an important current market and Kazakhstan as the eighth most important potential market in terms of outbound student mobility by 2020 (BIS, 2013). The UK has a range of interests in Kazakhstan related to 'prosperity, security and values', and is seeking to advance its bilateral relations (Robinson and Smith, 2015, p. 10):

> Mineral-rich Kazakhstan is about the size of Western Europe. Its economic potential has been obvious for some time, but the Chinese New Silk Road initiative has brought the biggest and richest Central Asian state into new focus. Kazakhstan is right in the middle of China's "one belt, one road." (p. 3)

In the mid-2000s, Russia and Ukraine became two of the top ten non-EU European countries of domicile for international students studying in the UK (HESA, 2006). According to a recent study, key factors that influence the course choices of undergraduate students from Russia studying in the UK are institution's website, their ranking position on league tables, followed by family, teachers, a visit to the institution, friends and education agents (IU, 2015, p. 49). In Ukraine, where the UK emerged as the most attractive country for study abroad, top motivations for studying abroad include improving students' English, gaining access to high quality of HE provision, and improved employment prospects at home and abroad. The UK in particular is familiar to young Ukrainians through UK cinema, pop music, and literature (Dowle et al., 2015).

In a context where 'former Soviet countries are still very much overlooked by UK universities as potential target countries' (14), this exploratory study seeks to establish mobility trends, as well as rationales and strategies of UK HEIs in recruiting students from former Soviet countries, as well as how the trends and strategies have been changing since the mid-1990s. The study was guided by the following research questions:

- What are the trends of student mobility from Russia, Eastern Europe, Caucasus and Central Asia to the UK and how have these been changing in the last two decades?
- Why and how do UK HEIs recruit students from former Soviet countries? How, if at all, have these rationales and strategies been changing in the last few decades?
- How do UK HEIs make sense of UK policies that affect international student recruitment?

This report starts with the description of the data sources. Subsequent four sections of the report revolve around the trends of student mobility, rationales for student recruitment, university perceptions of government policies, and strategies in student recruitment. The report concludes by looking into the future.

Data Sources

This report draws on the UOE data, HESA statistics, semi-structured interviews with a maximum variation systematic sample of UK HEIs, and documentary analysis.

The data on international student mobility are sourced from the UOE survey on international learning mobility, which is carried out jointly by the Organisation for Economic Co-operation and Development (OECD), the United Nations Educational, Scientific, and Cultural Organisation Institute for Statistics (UNESCO-UIS), and the Statistical Office of the European Union (EUROSTAT). The data are collected annually from national statistical authorities and are made publicly available by the UNESCO (UNESCO, 2016b). The most recent available mobility data pertains to the academic year 2013-14. The survey targets internationally mobile students defined as 'students who have crossed a national border and moved to another country with the objective of studying' in each of the reporting countries. Internationally mobile students form a sub-group of foreign students (UNESCO, 2016c). While the latter are not citizens, they may be usual residents of the hosting country. The survey includes only degree-mobile students, that is, 'students who pursue a higher education degree outside their country of usual residence' (UNESCO, 2016c). This includes internationally mobile students enrolled in all tertiary-level programmes, equivalent to levels 5–8 of the International Standard Classification of Education (ISCED). In the context of the UK higher education this includes Foundation degrees, Diploma of Higher Education, Bachelor's degrees, Master's degrees, and Doctoral programmes. Students on temporary student exchange programmes who are credited by their home institution and those studying on distance learning programmes in another country are excluded from the survey (UNESCO et al., 2015).

Another source of statistics on the degree mobile students is the Higher Education Statistics Agency (HESA). This is the UK agency for the collection, analysis, and dissemination of the UK HE statistics. The data purchased from HESA for the purposes of this study contains the statistics on degree mobile students from 15 former Soviet countries to UK HEIs since 1995, by the HEI, subject area, level of study, academic year, country of domicile, and gender (HESA, 2014). The HESA data was used to establish some general trends related to the above-enlisted variables and to select the maximum variation systematic sample of interview participants.

Interviewing was employed in this study to explore the views of international and admissions officers working in UK HEIs on student mobility from former Soviet countries, as well as changes in the rationales and strategies of UK HEIs for recruiting students from Russia, Eastern Europe, Caucasus, and Central Asia since the mid-1990s. Maximum variation sampling was used to identify commonalities and differences in the perspectives of UK HEIs that differ in the numbers of students they enrol from former Soviet countries. To this end, all UK HEIs were ranked by the total number of students from former Soviet countries enrolled in 2013-14. HEIs were divided into three groups: 20 HEIs that enrolled more than 500 students (Group I), 37 HEIs that enrolled 100-200

students (Group II), and 94 HEIs that enrolled 1-100 students from former Soviet countries (Group III). Every second HEI was selected from Group I (overall ten), every third HEI was selected from Group II (overall 12), and every forth HEI was selected from Group III (overall 20). Of the selected HEIs, 14 agreed to be interviewed – six HEIs from Group I, four HEIs from Group II, and another four HEIs from Group III (Table 1).

Table 1. The sample of the UK HEIs by number of student enrolments in 2013-14

Numeric identifier of the HEI	N of enrolled students from the countries of interest	Nation	Russell Group
GROUP I			
1	510	Scotland	No
2	442	Scotland	Yes
3	371	England (London)	No
4	273	England	Yes
5	258	England (London)	Yes
6	201	England	Yes
GROUP II			
7	160	England	Yes
8	140	England	Yes
9	133	England	No
10	116	Wales	No
GROUP III			
11	83	England	No
12	66	England	No
13	53	Wales	No
14	9	England	No

Two out of the 14 HEIs were located in Wales, two in Scotland and ten in England. Two of the ten English HEIs were located in London. We interviewed international and / or admissions personnel in the selected HEIs. The interview questions related to their interpretations of the student mobility patterns from Russia, Eastern Europe, Caucasus, and Central Asia to the UK, to the rationale of recruiting students from these regions, and to institutional strategies of international student recruitment.

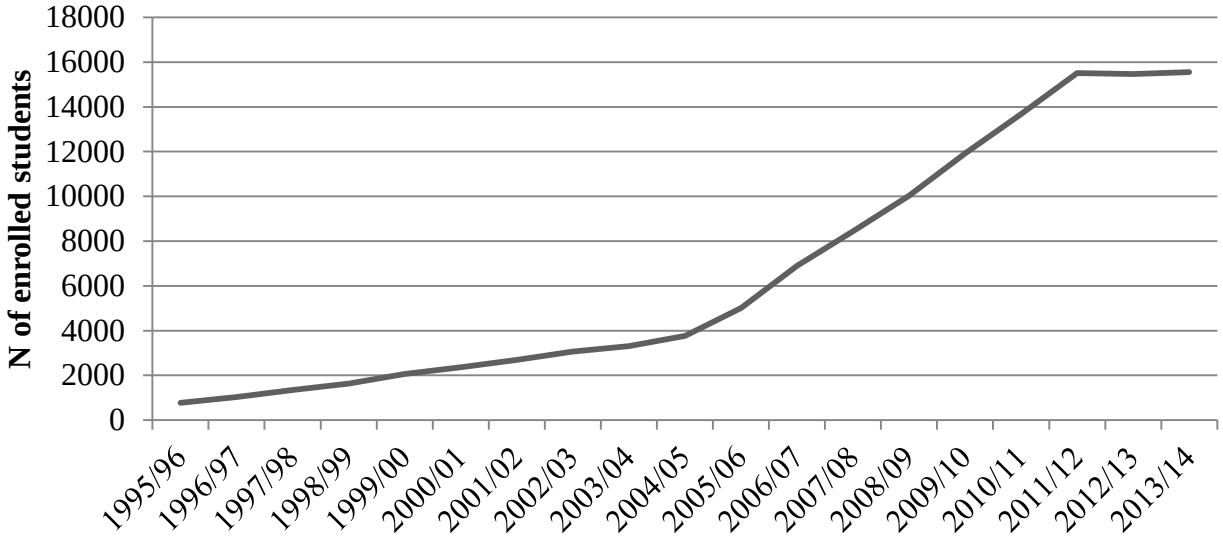
The interviews were conducted by the authors of this report in spring 2016.

In this report, numbers in brackets represent numeric identifiers of HEIs interviewed (column one on Table 1).

Trends: Student Mobility from Former Soviet Countries to the UK

There has been a considerable overall increase in the aggregate number of degree-mobile students from the region. While during the academic year 1995-96, 767 students from all former Soviet countries were enrolled at UK HEIs, this number reached 15,555 in 2013-2014 (Figure 2).

Figure 2. Cumulative numbers of degree-mobile students from former Soviet countries to the UK, by year



Source: own calculations based on HESA (2014) data

Interviewees had expected some growth in the number of students from Russia, Eastern Europe, Caucasus, and Central Asia but not at this scale. When asked to reflect on what might have contributed to this rise, interviewees talked about a multiplicity of factors related to the economy and the education systems in the source countries, as well as an increased effort of UK HEIs to recruit international students. The following quote contains all major themes that emerged from the interviews:

> It has partially to do with the countries in the region recovering from the Soviet days, changing internally in terms of the societal structures, how education is viewed, the opportunities that are available, and obviously having more opportunities to engage with outside – it was previously quite controlled where they could travel. The economy picking up in the country so you have more of a middle class who have an actual interest in study abroad and who can afford study abroad; and obviously demographic increases where you have a population increase of young people and for some of the countries the local universities just don't have the capacity to deal with these increases and the demand of places. For some of the countries this is one of the big reasons why they have scholarship programmes at Master's level. They just don't have the capacity in –country to offer the Master's programmes that are required and that there is interest. So it's a capacity issue for some countries. Of course the other side would be that perhaps UK universities for X number of reasons engage more with the countries and make people more aware of opportunities of studying in the UK. […] we are benefitting from having this reputation of UK universities that is really top-notch and that that's the best education you can get. (1)

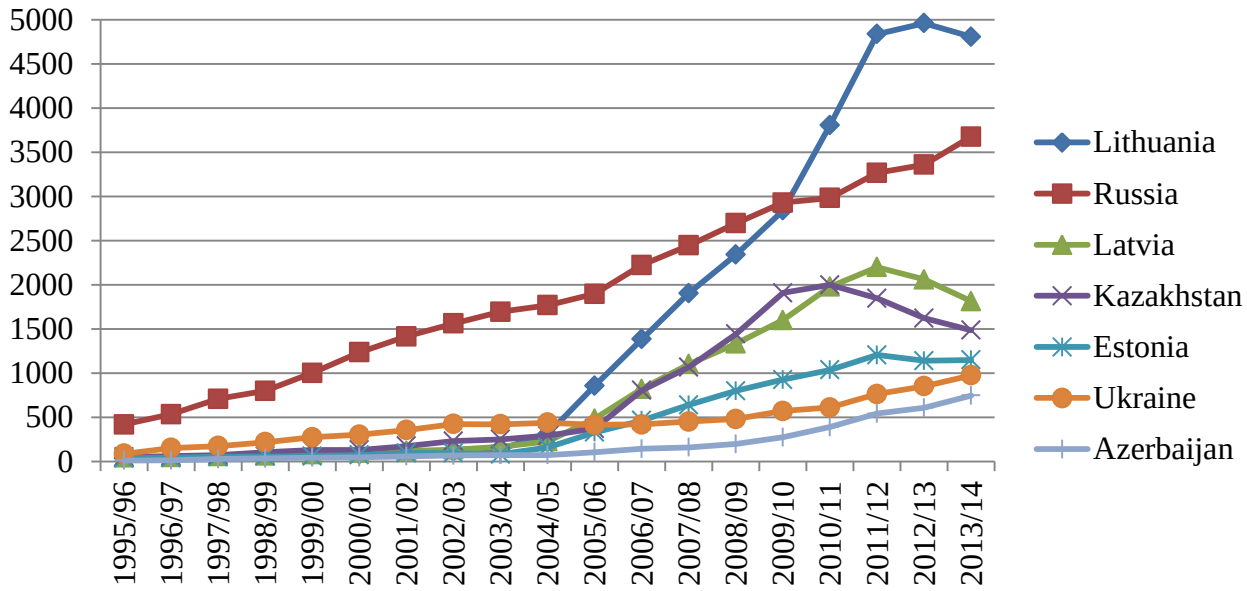
The recent plateauing in the numbers of students from the region (Figure 2) was normally explained by the political and economic developments in Ukraine and Russia.

In light of the decreasing revenues and the uncertain economic environment in oil-producing countries, parents of students may be more unwilling to take financial risks, it was argued. Another factor that may be linked with the levelling of the numbers may be the UK government's 2011 announcement on ending the Post-Study Work Visa which used to allow graduates to work in the UK for two years after the completion of their course.

UK visa regulations for international students do not affect the former Soviet countries that are part of the EU - Lithuania, Latvia, and Estonia. The UK is the most popular foreign destination for degree mobile students from these three countries (Appendix 2). The UK is amongst the eight most popular destinations for Kazakhstan, Russia, Azerbaijan, and Armenia. Despite the large variation in the population size of these countries, the degree of popularity is reflected on the numbers of students enrolling at UK HEIs by their country of origin.

While there has been an almost twenty-fold increase in the number of degree-mobile students from Russia, Eastern Europe, Caucasus, and Central Asia studying in the UK, there is considerable variation in the numbers of students enrolling at UK HEIs by sending country. Currently, the largest sending countries are Lithuania (4,807), Russia (3,676), Latvia (1,814), Kazakhstan (1,486), Estonia (1,149), Ukraine (975), and Azerbaijan (748) (Figure 3).

Figure 3. The largest sending countries to the UK from 1995-96 to 2013-14



Source: own calculations based on HESA (2014) data

The Baltic States currently send almost the same number of degree-mobile students to the UK (7,771) as all other former Soviet countries together (7,782) (HESA, 2014).

The steepest overall increase pertains to the number of students from Lithuania, for whom dramatic growth is observable after the country's accession to the European Union in 2004. While the development of student numbers from the other Baltic States

follows a similar pattern, the overall increase is somewhat less pronounced for Latvia and Estonia. The numbers of degree-mobile students from Lithuania currently exceed those from Russia by 31%. However, numbers of Lithuanian and Estonian students enrolled at UK HEIs decreased slightly for the most recent year 2013-14 compared to the very substantial growth in pre-2011 (Figure 3).

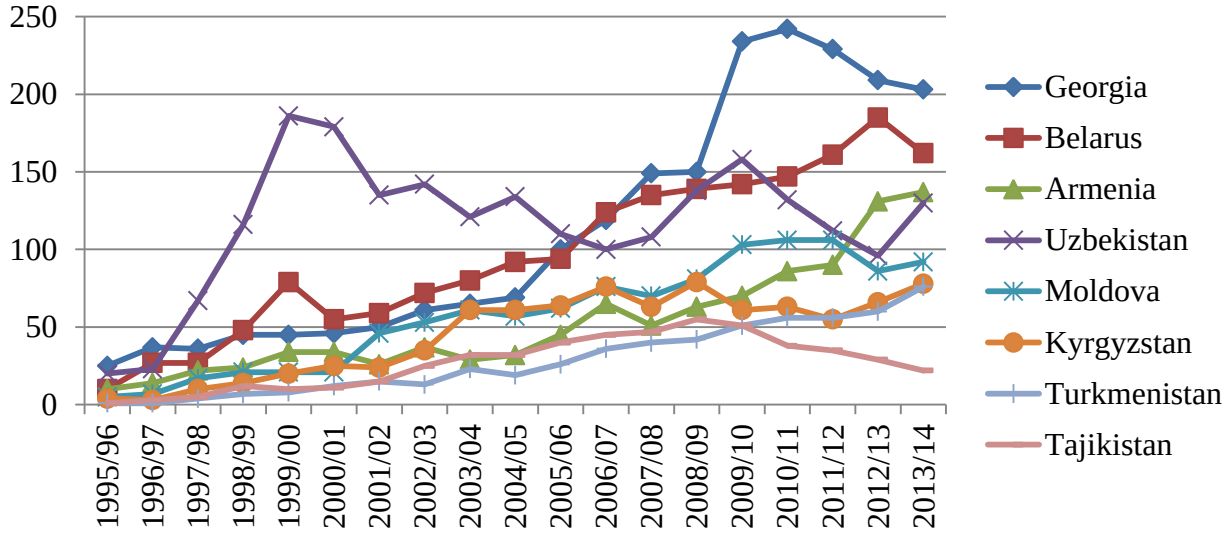
The most consistent growth over the entire 15-year period is observable for students from Russia (Appendix 1, Figure 3). At the same time, Russia shows the lowest average year-on-year growth during this period (Appendix 3). One interviewee noted:

> A lot of UK institutions have been active in Russia for a lot longer [than in other countries in this region], both in terms of student recruitment but also partnerships with institutions there. So we have had academic relationships with institutions in Russia certainly for as long as I've been with the university, which is about 14 years. (3)

Looking at the other non-EU senders within the set, one finds a rise in the number of students from Kazakhstan to the UK up until 2011-12. Following the decision of the Kazakhstani government to cease the funding of undergraduate studies via the Bolashak programme (Nurbek et al., 2014), the number of Kazakh students has declined by 20% from 2010 to 2014. While representatives of non-Russell Group HEIs were often aware of the role of this development in the drop in Kazakhstani student numbers, the interviewed representatives of Russell Group universities tended to be less aware of this change in the Bolashak funding scheme. The increase in the number of students from Azerbaijan follows the 2007 introduction of the State Program on Education of Azerbaijani Youth Abroad for the Years of 2007-15. Thus, the Kazakhstani and Azerbaijani growth figures follow the governmental scholarship introduction, expansion, and decline timelines. The interviewees consistently mentioned the importance of government funding schemes for Kazakhstani and Azerbaijani students, whereas Russian and Ukrainian government funding opportunities did not feature prominently.

The smallest senders of students to the UK among the former Soviet countries have been Tajikistan, Turkmenistan, Kyrgyzstan, Moldova, Uzbekistan, Armenia, Belarus, and Georgia.

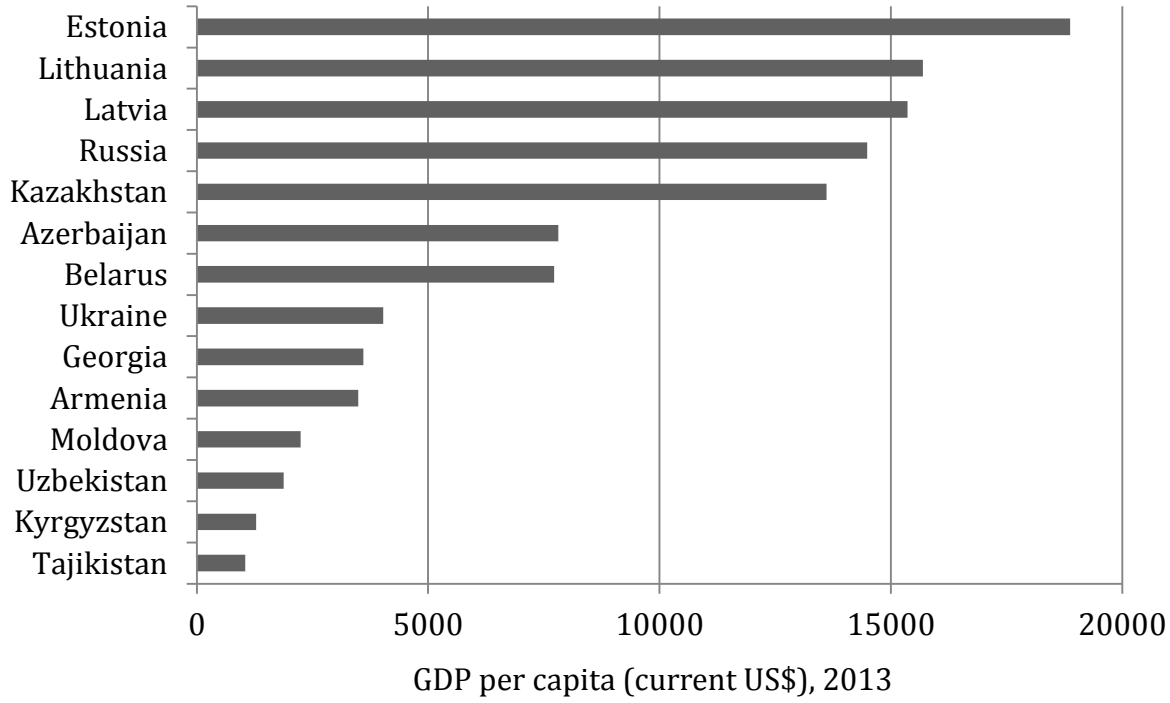
Figure 4. The smallest sending countries to the UK from 1995-96 to 2013-14



Source: own calculations based on HESA (2014) data

A key variable that explains the difference between the relatively larger and smaller senders of students to the UK is the GDP per capita. As seen on Figure 5, countries with higher GDP per capita are amongst the larger senders (Figure 3), whereas low and low middle income countries are amongst the smaller senders of students to the UK (Figure 4).

Figure 5. Former Soviet countries by GDP per capita (current US$), 2013



Source: World Bank (2013)

Of all students from former Soviet countries studying in the UK in 2013-14, 53% were enrolled at English HEIs outside London, 28% in London, 16% in Scotland, 2% in Wales

and only 0.3% in Northern Ireland (HESA, 2014). The absolute majority of students from Russia, Eastern Europe, Caucasus, and Central Asia choose England-based HEIs for their degree-level studies.

Table 2 displays the breakdown of students from EU and non-EU former Soviet countries by the location of UK HEIs where they were enrolled in 2013-14. London is an extremely popular destination for students from non-EU former Soviet countries with almost twice as many students studying in London from these countries (2,875) than from the Baltic States (1,555). Students from Russia have a well-defined preference for London-based HEIs; at least that is what the HEIs reported. 'There is a real pull to London, especially for students from Russia,' explained an interviewee from Wales (13). 'They look at the location and decide that it's going to be too quiet for them too far away from London. Certainly Muscovite students were always like that. They tended to be looking for big city locations' (12).

Table 2. Cumulative numbers of students from former Soviet countries by the location of HEI and their EU/Non-EU origin in 2013-14

Location	Cumulative Non-EU	Cumulative EU
England (excluding London)	4,008	4,240
London	2,875	1,555
Scotland	668	1,843
Wales	189	126
Northern Ireland	42	7
Total	7,782	7,771

Source: own calculations based on HESA (2014) data

Currently, Scotland emerges as a highly desirable destination from students from the Baltic States that send almost three times more students to Scotland (1,843) than all other former Soviet countries taken together (668). Tuition fee policies and the degree structure in Scotland may explain the differences in EU and non-EU enrolments. Following the accession of Estonia, Latvia, and Lithuania to the EU in 2004, students from Estonia, Latvia, and Lithuania became eligible for tuition-free education in Scotland and home rates of tuition in the rest of the UK. This resulted in a considerable increase in the numbers of degree-mobile students from these countries, as demonstrated by the statistics (Figure 3). Degree structure may also explain the lower popularity of Scotland among the non-EU former Soviet countries. One interviewee pointed out that the extra year in a Scottish undergraduate degree can pose a barrier in attracting students, particularly so if they are fee-paying:

> [It] normally means fees for an extra year so that causes a bit of an extra barrier to overcome. While the EU students might be happy to study an extra year, a lot of [non-EU] international students come with a clear career aim in mind and want to get there as quickly as possible. (1)

Based on the tuition-fee argument, one would expect Wales to be an attractive place for students from the Baltic States.[3] A Welsh HEI representative argued that 'the fee grant means that Welsh institutions are at the moment quite popular within the EU' (13). However, the HESA data on all degree mobile students does not demonstrate that Welsh HEIs are popular amongst students from the Baltic States. Neither do they seem to be popular among the students from former Soviet countries outside the EU. An interviewee explained this by comparing Wales with Scotland and arguing that students from former Soviet countries could have somewhat stereotypical views of Wales:

> Wales is probably nowhere near as progressive as Scotland is in terms of branding itself as a country. The Scottish universities work together far better than the Welsh universities do to encourage students to come to Scotland. There's a lot more Wales could do. We could do more to make the merits of Wales more known to the rest of the world.[…] Wales can be a bit of a double-edged sword itself when it comes to international recruitment. A lot of people have cultural stereotypes about Wales, the fact that we have our own language, they think that's going to be a barrier. That's a barrier in itself, particularly so for a lot of the countries that you're looking at. (13)

Across the UK, there is a strong historical trend in the institutional propensity of hosting students from Russia, Eastern Europe, Caucasus, and Central Asia. HEIs that host a large number of students from former Soviet countries tend to have consistently hosted large numbers of students from these countries in the last two decades. The correlation between the historical trends and the current statistics is very strong (r= .90, p=.01) (HESA, 2015c, 2014).

Those HEIs that enrol relatively higher numbers of students from this region also tend to enrol higher numbers of students from other non-EU countries. An institution-level analysis (N=151) shows that there is a strong positive correlation between the number of non-EU students and the number of student from former Soviet countries enrolled at UK HEIs (r= .68, p=.01) (HESA, 2015c, 2014).

The HEIs that host higher number of students from former Soviet countries tend to be larger institutions, with higher total number of enrolled students, than the HEIs that host fewer students form former Soviet countries (r=.28, p=.01) (HESA, 2015c, 2014).

Student enrolment patterns also differ by the type of HEI. One-third of all students from former Soviet countries were enrolled at Russell Group HEIs in 2013-14. There were almost twice as many students enrolled at Russell Group universities from non-EU former Soviet countries than from the Baltic States (Table 3).

[3] Students from the EU are eligible for Welsh tuition fee grant, which means that it is cheaper for them to come to the university in Wales than it is if they choose to go to university in England. A student from the EU pays approximately £3,000 and the Welsh fee grant covers the additional £6,000, whereas if a student chose to study in England it would cost them £9,000 (13).

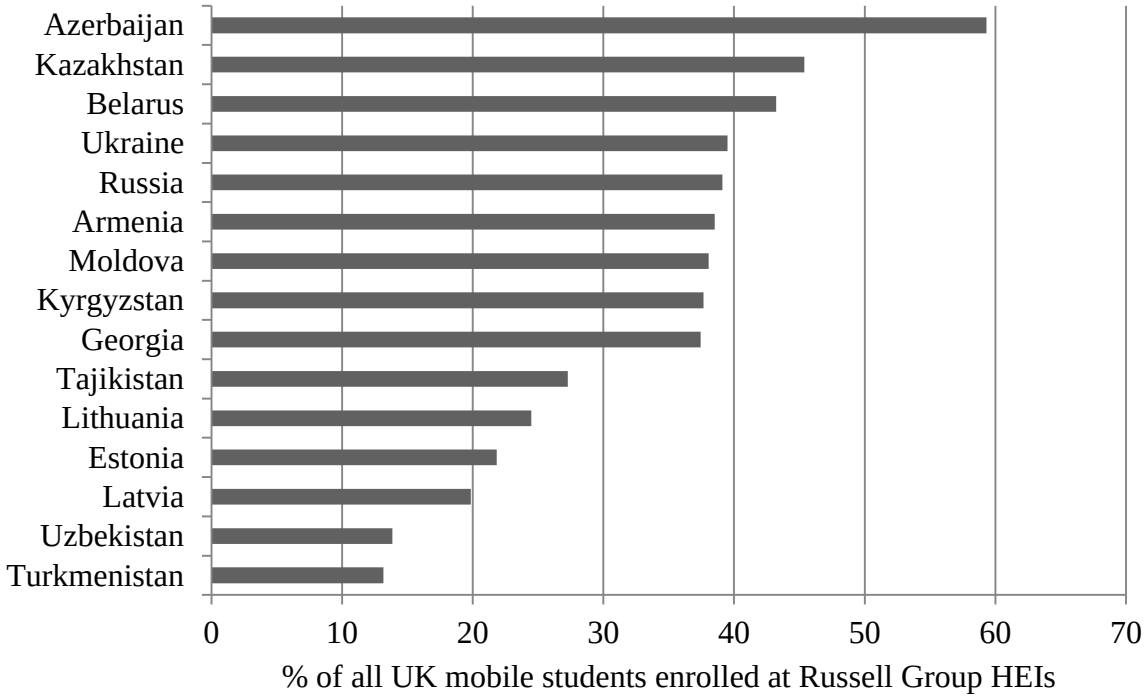
Table 3. Cumulative numbers of students from former Soviet countries by type of HEI and students' EU/Non-EU status in 2013-14

	Cumulative Non-EU		Cumulative EU	
Russell Group	3,232	41.5%	1,788	23.0%
Not Russell Group	4,550	58.5%	5,983	77.0%
Total	7,782	100%	7,771	100%

Source: own calculations based on HESA (2014) data

One factor that could explain this trend is that many students from former Soviet states who choose to study in the UK are government scholarship recipients, especially so from Kazakhstan and Azerbaijan. Figure 6 shows the proportions of all UK-based degree mobile students enrolled at Russell Group HEIs.

Figure 6. Proportion of all UK-based degree-mobile students enrolled at Russell Group HEIs, by country of origin in 2013-14



Source: own calculations based on HESA (2014) data

Azerbaijan and Kazakhstan are at the top of the list with 59% and 45% of students enrolled at the top UK institutions. As explained by an interviewee:

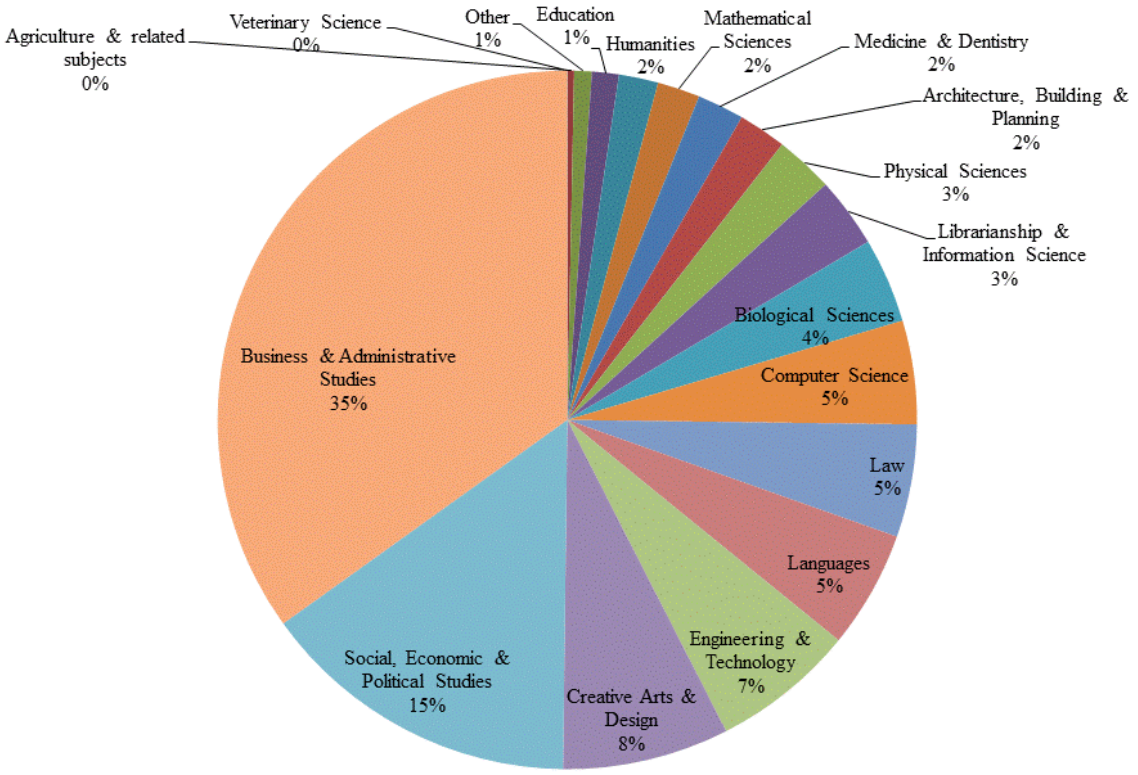
> The scholarship programmes are very ranking focussed, so you have to be a high ranking university in order to feature on the scholarship programmes and that goes to a certain extent for Kazakhstan. […] Two biggest issues with working in the region are the type of university that we are, where we are located and the ranking, which creates a barrier for us. (13)

Therefore, not being on the Bolashak list was a matter of concern to some institutions (3, 13). It appeared that the availability of government scholarships was associated not

only with the students' choices of HEIs, but also with the choices of their field of study: 'definitely the subjects they study are quite predictable. It is either engineering, business, or law. […] it's where the funding of the government is. It is where a lot of the jobs of course are' (1).

The most popular subject areas for mobile students from Russia, Eastern Europe, Caucasus, and Central Asia have been business and administrative studies (35% of all students) and social, economic and political studies (15% of all students). The least popular areas have been agriculture, veterinary science, and education, with less around 1% of students choosing each of these subjects (Figure 7).

Figure 7. Subject areas of mobile students from former Soviet countries, 1995 – 2014



Source: own calculations based on HESA (2014) data

Business and administrative studies were the most attractive subjects for students from this region from the very early days of independence in the 1990s (HESA, 2014). An interviewee explained:

> These were subjects in which the Russian Federation lacked a sufficient number of professionals who had a perspective that was informed by Western practice in this area. Accounting particularly. Accounting in the Soviet Union was really book keeping rather than an accounting profession, as it was described by my informants there. (12)

Business is referred to as 'a natural choice' for students from this region (7). 'The students I spoke to from the Baltic States tend to [study] either business or something related like accounting. They are not that dissimilar from other non-EU students. Most students want to study business – unfortunately that is what we find' (11).

Over the past 20 years, Russia, Lithuania, and Kazakhstan have been the three top senders of students to UK business and administrative studies programmes, as well as to social, economic and political studies programmes within the region (HESA, 2014). For some HEIs the image of a Russian student was that of a business school student: 'A lot of our Russian students will be in the business school and there is a large Russian student business community here. So if I think about the Russian students here I would think of the business students first almost' (2). HEI representatives explained that a business studies degree developed a lot of transferrable skills that could be used in a family business or a multinational corporation; 'they see business as the kind of foundation stone for that' (3). Some interviewees referred to cases where students intended to go back home to contribute their newly acquired skills and knowledge to their family business.

The interview data demonstrated that oil and gas engineering is also a very popular subject area for students from this region especially from oil-rich countries. Specifically, petroleum engineering and chemical engineering emerged as attractive specialisations. This may not surprising if we consider the fact that the Azerbaijani national scholarships are in fact funded by the State Oil Fund (State Oil Fund of the Republic of Azerbaijan, 2014). An institution that enrolled the highest number of students from this region reported:

> For us, anywhere that has to do with oil and gas is normally a region where we would be active due to the sort of portfolio of programmes that we have and the reputation. For the past five-six years Kazakhstan and Azerbaijan have been countries where we heavily invested because we have a lot of students from there coming here to do oil- and gas-related programmes and engineering. […] we have the programme that the country needs that people in the country want to study and of course because there is a government scholarship programme that supports people studying engineering programmes. (1)

The availability of government funding, for example in case of Azerbaijan, seems to be a strong determinant for subject choices. One respondent explained:

> In Azerbaijan they are very keen to fund certain sectors, the oil and gas sector, as well as finance sectors those drove the demand in subject areas, whereas in Lithuania where there is no imperative for scholarships we are seeing more a wide range of subjects being taken by students. (2)

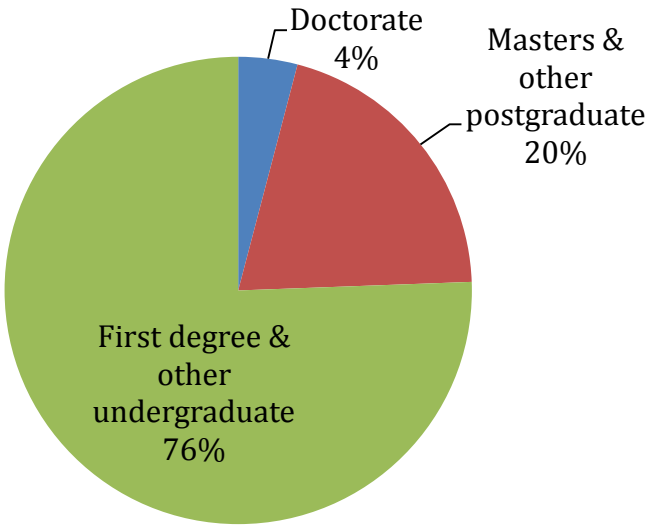
One of the interviewees mentioned that their Master's in Public Administration being very popular with students from Central Asia 'because it's a fantastic route into the government sector back in their home country' (4). This interviewee linked the subject preference with government scholarships and indicated that Law, Finance and Business and Investment were other favourite choices for government-funded students.

Thus, according to the interviewed admissions and international officers, the students' subject choices appear to be driven mainly by employability and funding opportunities.

Three out of four students from former Soviet countries was pursuing a first degree in the UK in 2013-14. 20% were doing their master's and only 4% their doctorate (Figure 8). These proportions, however, have been changing significantly over time: in 1995-96,

34% of all mobile students pursued their first degree; this figure more than doubled by 2013-14 and reached 72%. The proportion of doctoral students dropped dramatically from 16% to 4% in the same period. The proportion of those pursuing master's degrees also decreased from 28% to 19% (HESA, 2014).

Figure 8. Degree mobile students from former Soviet countries to the UK (2013-14), by level of study (%)



Source: own calculations based on HESA (2014) data

It appears that presently most scholarships are available at postgraduate rather than undergraduate level. The Russian President's Mobility and Global Education Scholarships, the Kazakh government's Bolashak Scholarships and Chevening Scholarships are all postgraduate funding sources. At the same time, families seem to be more prepared to incur out-of-pocket expenses for a UK undergraduate degree. We have identified very few funding sources in the UK that would provide financing of an undergraduate degree for non-EU students from these countries. An interviewee from a Russell Group HEI explained:

> 'At the undergraduate level for all of these countries they will be socio-economic elite. For postgraduates there will be some who will have managed to bootstrap themselves up. At the postgraduate level I would suspect that for all countries other than Russia and the Baltic states they will also be members of that super elite class. For Russia and the Baltic States because those – because my suspicion is that good quality education reaches slightly further down the socioeconomic spectrum such as that the kid of a civil servant in Moscow or Riga can go to a good school and from that good school they can get into a strong but not world class university and then they do fantastically well at that university and then they end up here. There will be some of those. And then they come here and they couldn't necessarily pay for it because they come from a kind of middle class background and a middle income country, which is not nearly enough to pay our fees, but they will then come here and get scholarships for it because they're fantastic. I predict that is not a large proportion, even of the Russian and Baltic students but that it's 20% of the postgraduates to make a number up. (8)

Another interviewee from a non-Russell Group HEI noted:

> The great majority of undergraduates have been funded by family funding. They tend to be from families where the father has been an entrepreneur in the new business environment in Russia or Kazakhstan. These are the families that I got to know well through engaging with them from the very beginning of the process. […] they would tend to be highly educated the fathers, the mothers too often. They would have benefited from a Soviet engineering education but then moved into the business world themselves. (12)

There may be links between the students' socio-economic status, the type of UK HEI and/or the level of study students choose. The interview data indicates that students with a more affluent family background and lower levels of academic achievement tend to pursue undergraduate studies at non-Russell group HEIs, whereas students with a less affluent family background who are reliant on funding from their home government or UK-based sources often need to gain admission to highly ranked, (mostly) Russell Group HEIs on pre-defined lists, thereby gaining access to higher quality education, mostly at the postgraduate level.

Rationales for Student Recruitment from Former Soviet Countries

The movement of students across borders, i.e. international student mobility, is recognised as the most visible form of HE internationalisation. De Wit, Hunter, Howard, & Egron-Polak (2015) define HE internationalisation as 'the intentional process of integrating an international, intercultural or global dimension into the purpose, functions and delivery of post-secondary education, in order to enhance the quality of education and research for all students and staff, and to make a meaningful contribution to society' (p. 29).

As a varied and expansive phenomenon, HE internationalisation may be driven by four categories of rationales: political, economic, academic, and socio-cultural.[4] The four rationales adopt different shapes and meanings when applied to the domain of international student mobility in different global contexts. Nation-states and/or HEIs may view international students as sources of income (economic rationale), potential labour force (economic), contributors to local economy as consumers (economic), ambassadors for the recipient country (political and socio-cultural rationales), contributors to the recipient country's innovation capacity (economic), contributors to the improvement of educational and research experiences of local students and staff, which increasingly relates to global university rankings (academic rationale). It has been argued that's since the mid-1990s there was a gradual shift from a political to an economic rationale for HE internationalisation.[5]

An excerpt from a 1987 paper by John Belcher who was the Director of International Education at Queen Mary College, University of London, reads as follows:

> If one examines recent government green papers and other related documentation one can conclude that Britain's policy as far as international students are concerned is: 1. Britain welcomes international students for a variety of reasons - educational, political, commercial and developmental; 2. in general their education should not be subsidised by the British tax payer; 3. but in accordance with perceived national priorities, carefully targeted scholarship programmes exist to benefit selected individuals and categories of students. (p. 128)

These three postulates remain relevant after three decades. In our interviews, representatives from almost all institutions referred to an economic rationale, while some social, cultural, academic and political rationales for recruiting international students in general and students from former Soviet countries in particular also featured.

Economic

In the second half of the 1980s, British HEIs started diversifying their sources of revenues, which was followed by a dramatic increase of internationally mobile students

[4] See, e.g., De Wit (2002); De Wit, Hunter, Howard, & Egron-Polak (2015); Knight (2012); Knight & De Wit (1995).
[5] See, e.g., De Wit et al. (2015); Kreber (2009); Luijten-Lub, Wende, & Huisman (2005).

enrolling at British HEIs. From 1985 to 1996, the number of students almost quadrupled from 53,694 to 196,346 (Guruz, 2011). In 1999, Tony Blair started the first phase of the Prime Minister Initiative which involved the British Council in promoting the UK HE sector abroad. Blair stated:

> Our universities and colleges are second to none. Their world-class reputation means that they are among the most popular for international students. I am determined to build on this strength with a long-term strategy to attract many more. The institutions, their students and our economy will reap considerable rewards. (Guruz, 2011, pp. 245–246)

'Considerable rewards' have been reaped due to the 'international student tax' that contributes to increasing the profit margin for the hosting HEIs. All interviewees demonstrated a strong awareness of the marketisation of the UK HE sector and the revenue that international students generate in the context of the consistently decreasing funding from the government and the business sector:

> Unfortunately, international students are seen as absolutely crucial to continued survival and continued funding to what the universities are doing. The more government funding goes down, the more importance is placed on the recruitment of those students to make up for gaps in funding. (1)

Some respondents talked about 'spreading the risk' by diversifying the countries from which they were recruiting, keeping the focus primarily on those countries that had 'students capable of paying fees. […] As far as the enrolled overseas students are providing funds that cover their cost of study at our university with a good surplus, those students will be a very good target for our university' (10). As shown earlier, former Soviet countries with higher GDP per capita are amongst the larger senders to the UK (Figure 5 and Figure 3). Three of the largest senders - Russia, Kazakhstan, and Ukraine - are oil-rich countries that were most frequently mentioned by the interviewees. These three countries also operate major government funding schemes for study abroad: Kazakhstani Bolashak Scholarships, Russia's Global Education Program scholarships, and Azerbaijan's State Program on Education of Azerbaijani Youth Abroad. The interviewees who talked extensively about these scholarship programmes also tended to view students from these countries as significant sources of income for their institutions. They explained how the fluctuations in the availability of such scholarships and/or changes in the conditions attached to them were reflected on the numbers of students they hosted from this region. A Russell Group university representative explained:

> The reason why we have worked pretty closely with Azerbaijan and Kazakhstan is that the government in both countries has dedicated scholarship funding... And that has primarily come from the benefit of oil wealth over the last years… There are a few different scholarship schemes in Russia. They are a bit more piece meal… we've been waiting for funding to come into place in some countries before we start engaging actively with them, so as the oil economy has increased since probably 2008-09, so that meant the Bolashak scheme in Kazakhstan we've been active there since 2009-10 and Azerbaijan since around 2011-12. (2)

A number of HEIs recognised international students as their main source of income, going so far as arguing that 'any university that says to the contrary is not telling the truth' (14).

The direct economic benefit to the HE sector and the UK economy has been estimated £1.4 billion a year in undergraduate fees and an additional £1.67 billion in undergraduate expenditure that goes to local economies (IU, 2015, p. 10). Universities that received more income from research rather than from tuition fees argued that 'by creating this international community of learners on campus, you're creating the opportunity that in the future you have more international partnerships and research collaborations across the world' (2). This was an important aspect of internationalisation for such universities as 'in the long-term, you have people connected in a huge alumni network around the world and connected back to the university that we can work with academically and on a research basis' (2).

According to the UK HE international Unit (IU), international students 'represent a pool of potential talent, who by completing a UK qualification provide substantial social and economic benefits not only for their home countries, but also for the UK' (IU, 2015, p. 10). The idea that international students can contribute economically to the UK as potential labour force (Cai and Kivistö, 2013; Mosneaga and Winther, 2013; Suter and Jandl, 2008) did not emerge in any interview. None of the interviewees chose to expand on the role of the students from this region, or international students more broadly, in contributing to the UK's innovation capacity/economic competitiveness (Chellaraj et al., 2008, 2008; Frans van Vught, 2009).

Some interviewees did not refer to any other rationale except generating immediate income from fees and living expenses, either for the institution or for the government: 'international student recruitment is important in terms of raising revenue for universities in the UK, so overseas students coming into the UK isn't a bad thing. This is the main issue why international students should come to the UK as far as the UK government is concerned'(4). However, many interviewees regarded the rationales for recruiting international students to be 'more extensive than that' (13), including socio-cultural, academic, and political.

Social and Cultural

There were three types of social and cultural contributions that students from Russia, Eastern Europe, Caucasus, and Central Asia were seen to make to the interviewed UK HEIs:

- contributing to the non-academic aspects of university life,
- increasing diversity on campus, thereby improving the preparation of all students for life and work in a globalised world, and
- contributing to the development of a more global mind-set in the wider community.

Both HEIs that enrolled larger numbers of students from the region, as well as those that hosted relatively smaller numbers tended to share a view of students from former Soviet countries as 'very active students socially who arrange all kinds of social events' that involve students from all countries. 'They want to promote [their respective country] culture within the university. So we find that these students tend to be very involved culturally' (6).

They were recognised as very keen on making friends from other countries and as actively contributing to social and cultural aspects of university life. They were described as 'quite confident students who are happy to integrate and quite excited about integration' (13), active students who join the Students' Union Governing Body in order to take on a responsible role in helping to improve the general student life (12). One interviewee thought that even those who came to the UK to study technical subjects seemed to be well-versed culturally and socially active, which the interviewee found surprising:

> If they're coming here as mathematicians or engineers, they're still very culturally aware. All of the mathematicians have read Bulgakov, all of the engineers can tell me about Chekov. I have discussions with students who come from technical backgrounds will still able to have a great conversation with me about transient Russian literature. I've always had that experience with Russian parents who come from technical backgrounds. You see their bookshelves, they've got lines of books with great Russian literature, it's not just technical literature. (12)

Exposure to mobile students from this part of the world was generally perceived as enriching the university experience for all students and contributing to students' preparation for life and work in globalised world: 'The university certainly believes that if students have a more global classroom it is more representative of the workforce that they are going to join when they graduate' (2). This was sometimes viewed as a particularly beneficial experience for British students who were not as mobile as students from other parts of Europe and, therefore, often lacked the opportunities of learning a foreign language or studying overseas. Social and cultural exchanges with students from former Soviet countries also 'offer students from the UK a bit of insight into what it's like in countries like Azerbaijan, Kazakhstan, and Russia. They wouldn't necessarily know that if they studied at a university with just home students' (4). Such interactions, it was argued, encouraged British students to study abroad and develop 'a different take on life', allowing them to be more prepared to live and work in the global context (3).

Experiences of exchange and interaction were particularly valued in 'fairly monocultural' contexts where some HEIs interviewed were located (11, 13, 9). The presence of international students, it was claimed, opened the eyes and broke down barriers for home students: 'even getting them to come down the valley this far towards [the city name] is a big thing for some of those students. They are going to have to learn to deal with people from different backgrounds, from different cultures' (13). Local communities also benefitted:

> This university is very conscious of the role that they play in the city. Being able to bring in different voices, different ideas and so on because the city is in the process of trying to regenerate itself so an organization, an entity like a university is critical to that and the more international facing and the global the university, the better that makes it for the city. Because we would arguably be much more internationally faced and global minded than some of the other organizations in the city. (9)

Thus, the social and cultural rationales highlight the importance of internationalisation for enhancing the student experience. This rationale was particularly valuable for Scottish HEIs: 'the universities in Scotland are generally recruiting overseas students for the experience on campus' (2). It is through a confrontation with other cultures that we make progress social learning and personal development.

Academic

Many interviewees considered the students from Russia, Eastern Europe, Caucasus, and Central Asia to be academically very strong, well-motivated, and highly educated: 'All the former Soviet states they've always invested in education, more so than a British family, they continue to educate themselves throughout their lives. I met a lot of people who had two degrees, three degrees' (7). Therefore, some interviewees argued, for students from the former Soviet countries the academic challenges, including those related to studying in English, are not as extensive as for other international students (13).

Students from the region were perceived as 'more sciency' (6) and some Russell Group universities were concerned that many talented students in former Soviet countries were not able to access UK higher education: 'I feel quite confident that there's an awful lot of talent in these countries that is not coming here. Most of it will be staying at home. Some of it we'd be losing to the United States or other universities' (8). However, this and other Russell Group institutions did not have strategies in place to address this situation as they seemed to benefit from a large pool of academically excellent applicants from across the world: 'We have tunnel vision on this. The reason why we admit international students is because they are bright. They really don't care where you're from. What they want is the brightest students' (6). This linked with the idea of a university being a global place that expands the possibilities of thinking big when there are a lot of international students enrolled at the institution:

> [University] is not just a local education institution. Any ambitious university wants to be global and that means attracting students from all over and that's not just a financial question. That's also about being global. It's in the nature of a university. You got to think big. If you got students from all over, you're something more than just a school at a high level. (9)

However, increasing diversity on campus was not always viewed as beneficial to learning and teaching, especially so when the international student body contains a disproportionately high number of a specific group of students. For some universities it seemed to be a challenge to achieve 'a good mix of students from all over the world,' to avoid the situation of one international student group dominating the campus (14).

China was recognised at the biggest market for the UK HE sector but it was acknowledged that HEIs 'don't want a whole classroom full of Chinese students; [they] need a mix' (7). Universities tried to ensure that there was a mix of students from the Middle East, from the Americas, and Russia and Kazakhstan were also areas of their interest (7). It was also feared that the dominance of a specific group of students or a high proportion of foreign students in the classroom would cause a 'backlash from home students' (2), especially in a class where the majority were non-native speakers of English.

One interviewee claimed that as soon as the institution would go over 15% of international students on campus, they would start to skew the overall student experience, primarily for home students. 'The balance in terms of numbers' was claimed to be a key indicator of successful internationalisation (13).

Institutions that focused on the social, cultural, and academic benefits of hosting international students in general and students from former Soviet countries in particular, also tended to refer more to their own institutional scholarship schemes, providing full or partial funding to international students. A respondent from a Russell Group university shared their success story of collaborating with the Ukrainian government to cover not only the stipend and tuition but also a waiver of the application fee for students applying to this university from Ukraine.

Political/diplomatic

Educating students from abroad was viewed by the majority of interviewees as an important mechanism for countries to 'get a better understanding of what makes each other tick' (11) and to 'build bridges and create cultural understanding, reducing the likelihood of war and terrorism and just binding people together in ways that are helpful for peace and prosperity' (8). When it came to students from Russia, Eastern Europe, Caucasus, and Central Asia, this was achieved via:

- students' political activism on campus,
- alumni that act as ambassadors, and
- the promotion of British cultural values.

Students from the region were frequently considered to be politically active on campus. Some interviewees from Russell Group universities mentioned the role of country-focused student societies in raising political consciousness and some activism on campus. These societies were 'very active in advising government back home. They seem to be quite well-connected politically or they seem to be attempting to get that political connectivity with their home countries' (6).

Interviewees recognised that students who come to the UK to study develop an affinity with the UK; they are the 'best ambassadors' (9) for the UK, 'for the culture they've absorbed when they were here' (3). Many alumni, t was noted, had 'an admiration for

the UK and for our values. They retain that admiration and that fondness for the country and in some respects they see it as their alma mater' (7). Because of being so pro-UK, international students were considered activists that 'do sell the UK abroad' (7).

Foreign government-funded students from abroad were claimed to be 'strategically important', as they were most likely to work at public institutions back at home and achieved better outreach to the wider public (10) in promoting British cultural values:

> It's a UK policy. You can see that in the Chevening Scholarship website. They are very open about it that they want to provide scholarships for people to come and study in the UK to go back to their home countries and spread British culture and values in priority subject areas, whether that could be in journalism, in human rights law, in business and finance – it is driven by a lot of soft power initiative. (2)

Although many interviewees were positive about the influence of inbound and outbound mobility on promoting British cultural values, it appeared difficult for the interviewees to pin down what exactly constituted such values: 'The quality values, the UK good standards, the commitment values, and other positive values related to British culture' (10).

Lastly, when asked how they would classify students from former Soviet countries - as backdoor migrants, as transient consumers, as innovators, as ambassadors, and as activists – a few interviewees indicated that international students, students from former Soviet countries included, were mostly transient consumers, who contributed to the UK economy:

> The problem is communities don't understand the value of students – the income it brings in. And it's not to the universities, it's to the local – you know, it's the taxi drivers, it's the hotels, it's Sainsbury's, it's Aldi, it's all the shopping centres – without students the towns would be quite ghostly. (7)

The majority of interviewees tended to view students as ambassadors, but with mostly economic connotations. They talked about the students from this region as ambassadors who would give good feedback about the university to those interested in study abroad back at home. It was reported that alumni often participated in the recruitment events of the British HEIs in their home countries. 'An ambassador for the university, an ambassador for UK education,' is how an interviewee defined their international students (14). Finally, some HEIs viewed mobile students' ambassadorial functions very broadly: 'we would hope that they would be ambassadors for their research, for their country, for their subject, and for the university as well' (6).

University Perceptions of Government Views and Policies

Our interview partners tended to think that students from Russia, Eastern Europe, Caucasus, and Central Asia are rarely distinguished from other students in terms of government policies and that they were 'probably lumped in with all other students coming from overseas' (9). Moreover, the general attitude of the government towards international students was perceived to be positive, as one interviewee put it: 'the government is broadly very positive about attracting international students whether from these countries or otherwise, but it might not appear so because of our border controls' (6).

However, attitudes and the rationales for supporting international student mobility to the UK differ not only across HEIs but also across government offices. Some of our interviewees suggested that there exist 'a whole cross-section of views' in the government (6) and that the three government departments that have the most differing and sometimes opposing views are the Department for Business, Innovation & Skills (BIS), the Foreign and Commonwealth Office (FCO), and the Home Office.

The BIS and FCO were regarded by most interviewees as interested in attracting increasing numbers of academically excellent students from all over the world with a view to strengthening the UK economy and building cultural, political, and diplomatic links with other countries.

The BIS is the department for economic growth. The department invests in skills and education to promote trade, boost innovation, and help people to start and grow a business. In the perceptions of most interviewed HE representatives, the BIS tends to view international students as 'a very sustainable source of extra funding for British universities, which they then don't have to fund themselves' (2). International students for BIS are 'major contributors to the economy, both by the research that they do while they're here which can turn into the next great business, [and as] cash cows or you might somewhat less prejudicial say "substantial contributors to the economy" because they do bring a lot of money with them' (8). Thus, if we choose the BIS perspective, the UK government is

> Very attracted to overseas students and they are attracted by very able overseas students because they contribute to our sector and potentially they contribute to the economy, particularly at graduate level. So we want to attract talent as a country and that's recognised in government rhetoric. (6)

The FCO promotes the UK's interests overseas, supporting its citizens and businesses around the globe. Thus, the FCO tends to view international students in the context of relationships with other countries. It is a ministerial department, supported by 11 agencies and public bodies; amongst them the British Council and Chevening Scholarship Programme. The British Council is 'the UK's international organisation for cultural relations and educational opportunities, building lasting relationships between the UK and other countries. It is an essential part of our international effort to promote British values and interests' (GOV.UK, 2016). The British Council undertakes

intelligence work on student mobility for the UK HE sector and collaborates with other country agencies to prepare such reports. For example, the report by Engberg, Glover, Rumbley, & Altbach (2014) was produced by the British Council in collaboration with DAAD. This report includes relevant information on scholarship schemes by the Russian and Kazakhstani governments. Many interviewees, in particular non-Russell Group HEIs, recognised the positive role of the British Council in 'keeping the profile up in these countries' (9) and providing market intelligence for recruitment. However, some interviewees argued that the role of the British Council should not be overestimated as in countries like Russia:

> The British Council is not allowed to actively promote the UK education sector; yet we still have a large number of Russian students coming to the UK through connections in business, in families, in diaspora. So there are connections between the region and the UK and that helps us to drive recruitment. (2)

The UK government offers scholarships to those who wish to study in the UK. Chevening Scholarships were established in 1983 to support the study of foreign nationals at UK universities, mostly on one-year Masters' degrees. These are the scholarships 'for students with demonstrable potential to become future leaders, decision-makers and opinion formers' (GOV.UK, 2016).

The Home Office is the government department responsible for immigration, counter-terrorism, police, drugs policy, and related science and research. In the perceptions of most interviewed HE representatives, the Home Office tends to view international students 'as part of out-of-control or at least much too liberal immigration policy that needs to be reined in' (8); hence, the existing UK visa regulations.

Students are the most popular category of migrants in the UK despite the fact that they are the largest group of migrants (British Future and Universities UK, 2014). The majority of foreign students come to the UK temporarily. Only 14% (1 million) of foreign-born residents reported that they originally came to the UK as students (Cooper et al., 2014). Almost all interviewees believed that students from former Soviet countries were highly unlikely to choose to enter the UK HE sector for the purpose of future migration. Interviewees were often under the impression that students from former Soviet countries tended to keep close links with their home countries while in the UK and aspire to go back and contribute to their countries of origin.

The UK student visa application process was described as quite costly, complex, and impractical: applicants had to pay a considerable sum for their health surcharge; students who were coming to do a course for less than 12 months were not allowed to bring any dependents with them; the post-study work visa was very limited; the minimum salary that graduates had to earn to stay on in the UK had been raised to £35,000. All interviewees viewed visa regulations for international students as a serious impediment to student recruitment. The student visa application process in particular was referred to as 'the major obstacle' (10), 'instantly a barrier' (6), 'too complicated' (5), 'very negative' (11), 'very subjective and very off-putting to the students' (14), 'stringent' (4). Moreover, the interviewees shared:

> The whole process [of visa application] generally perceived as very unwelcoming and negative. It creates a negative impact on how welcome people feel. (1)
>
> They make it very difficult. A lot of our competitor countries like Canada and so on are advertising the opportunity to come to Canada, you've got the opportunity to work here, the possibility of settling here and that puts the UK at a huge disadvantage and the policies are becoming more and more stringent. It is very hard to explain to someone why of all that is. (9)
>
> The rhetoric about visas clearly dampens demand. [International students] perceive that the country is a little bit hostile to them. The rhetoric around it clearly hurts; there is a story out there that the UK is not particularly interested in international students. (8)

'Universities are, by nature of their commitment to advancing universal knowledge, essentially international institutions, but they have been living, increasingly, in a world of nation-states that have designs on them'; these words of Clark Kerr (1994, p. 6) describe the British landscape of international student recruitment where universities try to introduce special schemes to mitigate the impact of government policies. One of the Russell Group universities has introduced 'a year in employment' for their third year undergraduates to ensure that all undergraduates get work experience. Moreover, some HEIs have started to provide two-year master's degrees with a project or work component.

Another example came from a London-based university that works with other local HEIs on 'Study London' which is a programme run by the Mayor's office. The initiative tries to promote London as a study destination, as a welcoming destination, as a tolerant city, as one that is very multicultural and diverse, a great place to study, full of high quality universities (3).

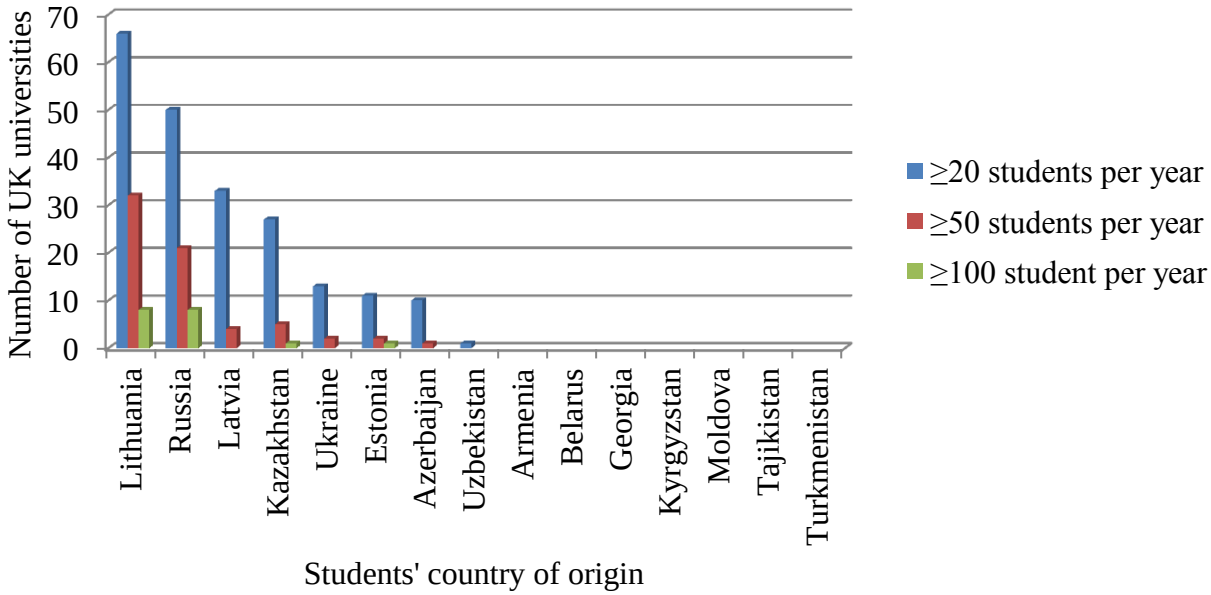
None except one HEI that we interviewed mentioned undertaking lobbying activities in order to influence the government approach to international students as migrants. The only exception was a Russell Group institution that explained that the lobbying was done 'vociferously' by Russell Group universities as a group, not individually, and that 'nothing will happen on that until after the referendum. After that, maybe, maybe things settle down' (8).

Strategies in Student Recruitment from Former Soviet Countries

Priorities

China, India, the USA, Malaysia, Hong Kong, Middle East, and West Africa emerged as the top non-EU priority markets for the HEIs interviewed. Increasing numbers of applicants from these top priority countries were expected to apply to UK universities and therefore the largest chunk of the HEIs' recruitment funds went to these countries. Interviewees classified countries like Singapore, Japan, and Russia as Tier 2 priorities. These were the countries from which the universities received more than 20 students per year, as some interviewees explained. HEIs did not expect a lot of growth in tier 2 countries and seemed to focus on maintaining their activities in these countries with minimum investment. Countries that sent less than 20 students per year were often referred to as Tier 3 priorities. As seen on Figure 9, according to the 'more than 20 students from the country' criterion, there are a number of UK universities that would be expected to have Lithuania, Russia, Latvia, Kazakhstan, Ukraine, Estonia, and Azerbaijan in their Tier 2 priority list.

Figure 9. Number of UK universities enrolling ≥20, ≥50, ≥100 students per year, by country of origin in 2013-14



Source: own calculations based on HESA (2014) data

HEIs that grouped former Soviet countries as Tier 3 priorities, described some of the reasons why they did not recruit more actively from those countries: 'we thought either they were too hard or they were too mature and in order to get some benefit we would have to invest a lot of resources into recruitment. Those countries include Russia, Japan and Korea, but also includes many of the Central Asian countries as well' (11). Another HEI representative said: 'it's a region that we struggled with. We have tried to engage. We have more success with the EU fringes, so those countries that are in the EU but a lot of the countries we have struggled with' (13).

Only two out of six universities from the Group I sample (i.e., those HEIs that enrol more than 200 students from former Soviet countries per year) recognised this region as strategically important: 'Russia has been in the top five [countries of recruitment] in the last 10 years' (3).

For many HEIs interviewed the establishment of geographic priorities was informed by market intelligence provided by the British Council. One London-based Russell Group HEI indicated that they conducted 'quite intensive market analysis' (5) by looking at the country of origin and subject choices of incoming international student numbers at Russell Group universities only. For a few non-Russell Group HEIs, their own enrolment statistics seemed to be the main benchmark:

> After the intake [recruitment officers] look at the enrolment statistics from their region and they come up with a plan and recommendations for the following year, so they produce a strategy or plan both in terms of activities and budget that they would like for the following cycle and that's prepared usually around April-May time. (13)

Whether it is the utilisation of the existing market intelligence or their own market analysis, most of the HEIs conceptualised the importance of markets in terms of their size, i.e., potential student numbers.

A number of interviewees wished to expand student recruitment from former Soviet countries for a variety of reasons: First, there were cases when international officers or academics developed personal and professional links with one or more countries in the region (7, 12, 5, 13). 'The presence of a sizeable number of Russian professors at the university has helped me to no end. Our Physics Department and Mathematics Department are very Russian […] they were also helping me with advice about universities, with their own partnerships that were bringing new students to us in any case and their own willingness to provide scholarships to those students' (12). 'The fact that I was particularly able to work through Russian as well as the experience I had already acquired in former Soviet countries was something that attracted the university to invest more in trying to reach these students' (12). Another interviewee argued that 'if you happen to have a member of staff from that country at the university or somebody who is particularly keen on recruiting students from that country', the recruitment is more successful (13).

Second, some institutions viewed these countries as potential sources of academically strong students (6, 11, 12): 'if they have higher qualifications, better qualifications, better opportunities than in previous years, the best of the best might not have been in that area, but now it's likely that they could be' (6). Another interviewee noted:

> Generally the reputation of Russian students was high among the academics here so that was also a driver of this… although the numbers were not very large, the quality of students was very good and student quality has been a high priority and continues to be a high priority… by and large student [from former Soviet countries] have a reputation of being strong academically and well-motivated. (12)

Finally, some HEIs recognised the importance of diversifying their non-EU recruitment activities (12, 2, 4, 9) in order to ensure that there is a fairly diverse mix of students on campus. An interviewee explained:

> You see a few countries that dominate the higher education sector: North America and China specifically. So what we are trying to do, what we have a strategic imperative to do is to try and engage more with regions outside of these dominating countries with regard to student recruitment. In that way, yes it is a priority for us to engage more closely with countries in Central Asia and Russia. (2)

Diversification was seen as an important aspect of non-EU student recruitment also in terms of minimising risks: 'If you are too reliant on one country or one market you are then subject to something happening in the country. So it's really about business risk that you want to be spreading' (9).

Approaches

The majority of the HEIs indicated that they did not have a clearly formulated strategy for recruiting students from Russia, Eastern Europe, Caucasus, and Central Asia. It was repeatedly noted, however, that this would need to change within the next few months as the competition for international students was increasing.

Most interviewees talked about *approaches* to recruitment instead of *strategies*. *Strategy* was not the right word when describing the current approaches, an interviewe explained: 'it's been entirely opportunistic; I wouldn't dignify this as strategy' (11).

The recruitment approaches used in the region did not tend to differ from approaches used in other international contexts. 'For most of the countries we engage in it's a mix of approaches that doesn't differ too much between the countries,' as explained by an interviewee (1). These approaches included: country visits, recruitment via agents, working with schools within the countries of interest as well as in the UK/EU, customer relationship management (CRM), alumni engagement, and country-specific scholarships.

Country visits emerged as one of the most popular approaches to student recruitment from Russia, Eastern Europe, Caucasus and Central Asia. At more than half of the interviewed institutions target countries were visited fairly regularly, about twice or three times a year. All of these HEIs except one were non-Russell Group institutions. The number of HEIs using country visits to recruit students from this region seemed to have increased dramatically in the last five years. An interviewee who has worked in the education sector in this region for a long time explained:

> Over the 20 years it's [increased] gradually, but over the last 10 years increased incredibly. For example, in Azerbaijan – when I first started five years ago, hardly anyone went. There were maybe four UK schools and I was at a fair two years ago and there were maybe 60 universities from the UK. (7)

Country visits included participation in exhibitions, education fairs, engaging with official sponsorship bodies, building direct contacts with local HEIs, schools, and agents. Those HEIs that used country visits seemed to be happy with the outcomes:

> The relationships with the events' organisers worked very well, the quality of students was very good. In the Baltic States our activities started off 8, 9 years ago with attending recruitment fairs and we saw the benefits of that roll on into 2011 as well. We haven't done this for the last couple of years and I dare say that we are suffering from that. (11)

The target countries for such direct recruitment were Kazakhstan, Azerbaijan, Lithuania, Russia, Ukraine, Latvia, and Georgia. Out of these, Kazakhstan and Azerbaijan featured in the interviews most prominently.

As the competition for international students is becoming rather intense, HEIs tend to invest large amounts of resources in student recruitment. According to one source, UK HEIs spend $3,000-$5,000 per international student on average on international staff support, marketing costs, agent commissions and overseas offices (Kemp, 2016). Data obtained by *Times Higher Education* (Havergal, 2015) demonstrates that 106 UK HEIs paid £86.7 million to for-profit recruitment agents in 2013-14 for the recruitment of 58,257 non-EU students (average agent fee per student was £1,767). This is almost one third of all non-EU students who started their courses that year. Coventry University, the University of Bedfordshire, and Newcastle University were the biggest spenders on agent fees. The same source indicates that the Universities of Oxford, Cambridge, and Imperial College London did not use any agents. Out of the remaining 15 Russell Group HEIs that shared their details of agent fee payments, eight institutions were amongst the biggest 20 spenders (Havergal, 2015). 70% of the HEIs were not aware if the agents also charged fees to the applicants (Matthews, 2012).

For-profit recruitment firms started operating in Britain in the 1980s (Belcher, 1987) and now provide a variety of services to the majority of UK HEIs, including language training, foundation programmes, pathway programmes, fairs, international education advice services.

HEIs that arranged regular country visits also worked with recruitment agents in the region. All HEIs in the sample except three[6] had worked with agents in one or more former Soviet countries. One interviewee defined such recruitment agencies as

> independent commercial bodies who counsel students. [Agents] will have contracts with a number of universities... The students will approach them and they will counsel the students on the best fit for them and assist students with the application process, the visa process. The agency will receive payment from the university that they have a contract with based on the recruitment of that student; so a purely commercial agreement. (3)

Some HEIs had been building these links for years while others have just entered the market:

> [In 2002] we had a very small international office, not particularly well funded. Nevertheless […] I was allowed to travel to Russia and engage with agencies and that was

[6] Two Russell Group universities that do not work with agents in any region and one non-Russell Group that works with agents but not in this region.

> partly because there was a drive on the part of the university to diversify their international student population. (12)

Those HEIs engaged with agents reported varying degrees of success in their work with agencies. A London-based HEI reported that 20-30% of their Russian students came through an agent (3). A Russell Group HEI that is not based in London reported that less than 10% of their Russian students were referred to them by a recruitment agent (2). The International Student Barometer survey[7] data that involved 11,351 international undergraduates in UK HEIs in 2014-15 demonstrates that educational agents influenced the choices of 23% of Russian students in the sample (IU, 2015, p. 47). Across the interviews, the role of agents was not underestimated. One of the most popular universities for students from the region reported very active engagement with agents.

> In Azerbaijan I just met with two of our agents. I just popped in, had a chat with some of the people, briefed them, updated them on what is going on at [the university], what is changing for the next intake, new programmes, discontinued programmes, any scholarship updates and so on. We've also been supporting, if they run their own fairs, if possible we're trying to attend, we'll have sessions where I would be an hour in their office and they could invite prospective students that they have or people that they know might be interested in [the university] and chat with myself on a one-to-one basis. And of course if they have a brochure/ magazine, we might advertise in that and we might send them materials like comments from our various prospectuses, or videos that they can promote on their website and social media applets. (1)

The HEIs shared their reasons of engaging with agencies:

- agents have networks within the country – at local schools and HEIs,
- they know the market, and
- they know the preferences of students.

While some HEIs talked about picking and choosing appropriate agents operating in the region - 'there are a lot of agencies, but we focus on a small number of high quality agents as managing a large network of agents isn't practical, so it's better to have a small number of agents and then understand very clearly how the agency works, get to meet the staff, and understand how they go about engaging with students' (4) others faced problems finding a good agent that worked in the region: 'we work with some [agents] in the Baltic countries. It really depends on whether you can get a good agent who wants to work with you' (9).

Representatives at two universities that had been engaged with agents in this region for a long time thought that agencies worked slightly differently in this region when compared with East Asia, for instance. 'Quite a low volume and more of a travel agency service, rather than a recruitment agency service,' explained one interviewee (2). Another HEI representative provided some further details:

[7] 'The International Student Barometer (ISB) survey has been implemented by over 100 UK universities and by more than 800 universities worldwide. Comparisons at the national level are limited to participating universities in any specific year. However, as the world's largest student survey, with more than 2.3 million responses globally, the scale of the exercise provides substantive indicators for most aspects of the student experience: a global benchmark for higher education.'(IU, 2015, p. 21)

> [in 1996] I met some very new educational agencies in Russia, we found out that most of them were also travel agents and that most of their business was in the short term English language market for Russian students. […] But very shortly after that agencies concentrated on the UK higher education market, and working in relation to travel and, well, English language courses sometimes continued to be very important for them. (12)

Two major trends emerged in relation to student recruitment from the region: a shift away from exhibition-based recruitment, as 'exhibitions are quite often really about keeping your profile up in the country rather than a recruitment opportunity' (9), and a shift away from agents to engaging with the increasingly well-informed applicants directly: 'students are more keen to engage with us, virtually by email, phone, or online via our website than in the past when they have required the service of an agency' (2).

Some Russell Group HEIs worked with private schools within the countries of interest, as well as with international schools in the UK and EU. There was a clear tendency to work with schools directly and/or via agents. One of the interviewed Russell Group HEIs organised an annual conference in the UK for international counsellors:

> guidance counsellors from schools around the world are invited to [the university] to learn about it, the idea being if you reach the guidance counsellors, then they'll go back and tell their students that [the university] will be a good place to get to; mostly international schools and well-off schools because those are the ones that [are] more likely to have students who could come here. (8)

Alumni engagement and personal referral in general were viewed as rather effective recruitment devices. One HEI that hosted a very large number of students from this region, reported:

> Word of mouth is of course always important so we try to engage with our alumni in the region. Often more important than a paper ad or running a radio campaign, if alumni X says "my uncle studied here and had a great time." The family unit is still very strong and the recommendation or opinion of family members can be very important in influencing the decision. (1)

Friends and family back at home were recognised as the main points of contact for international students. These close circles of people received a lot of information on professional and personal experiences of students in the UK. 'If students aren't having a good time or aren't feeling supported by the university then your enrolments will drop and by having support available and people having a good time and feeling supported they will share that information with others' (2).

Customer relationship management (CRM) emerged as an important facilitator of international student recruitment. A non-Russell Group HEI explained:

> We've been investing in customer relationship management – CRM – systems, so how you keep up the engagement with students or I should say the potential applicant. Because the student starts out as someone who makes an enquiry, then if they make an application, they become an applicant and it is when they enrol that they become a student. So with CRM we are looking at the inquirer and applicant phases of that student. (9)

A number of other HEIs also talked about the systems they had in place to support international applicants and students upon their arrival to the UK. However, not

everyone referred to this system as CRM. Multiple support services during the pre-application and application cycles came under the umbrella of the international office at HEIs interviewed. International offices seemed to be expanding considerably in many of the interviewed HEIs. An interviewee reported that their international office had grown to 60 people 'not so much because of recruitment activity, but to ensure good student support as personal referral is apparently the most important "recruitment" factor. So student satisfaction ranks high on the agenda' (2). This university employed another team that helped students with immigration, accommodation and settling in on campus, and yet another team that helped students with their welfare while they are in the UK. The university claimed that this 'additional support has allowed us to grow at another rate' (2).

Finally, country-specific scholarships were mentioned by a small number of interviewees as a tool for encouraging applications from specific countries. All representatives from the Russell Group HEIs in our sample stated that the majority of their scholarships were generic merit-based scholarships, open to students from all countries. However, there were a few region-specific schemes in collaboration with home country governments (e.g. Ukraine) and/or foundations (e.g. OSF). A representative from a non-Russell Group HEI that enrolled a high number of students from the region indicated that they used to have 'special scholarships for people from the Baltic countries to make it easier for them to come here, for living costs and so on' and that this scholarship encouraged more students to apply from the Baltic States (1). Yet another university provided automatic discount to students who were from lower income countries, but not upper to middle income, and some former Soviet countries fell in this category (9).

Looking into the Future

It emerged from our interviews that former Soviet countries are often overlooked by UK universities' international recruitment teams as potential target countries. Some of the interviewed admissions/international officers noted that markets in Russia, Eastern Europe, Caucasus, and Central Asia 'have become more attractive and we're probably doing ourselves no favour by ignoring the markets' (11). At the same time, it was recognised as a region that UK HEIs had a lack of knowledge about. These were not countries widely travelled by UK residents. Moreover, the countries in the region were not sufficiently differentiated:

> Certainly they tend to get lumped together and I'm sure that's unfair. There will be a huge variety of peoples, cultures, environments, and we tend to look at them pretty much as a lump. […] if they have felt themselves under the heel of Russia, they're probably very keen to assert their independence. It would be really helpful to have some differentiation between the former states so we could understand what makes Belarus different from Ukraine, different from Georgia – I don't think we've got that. (11)

Therefore, some HEIs suggested that 'looking longer-term, this region probably needs breaking up a bit' (9).

When considering future trends of student mobility from the region, the interviewees referred to the economic situation in the source countries, the development of the HE sector within the source countries, the UK government discourse on migration, and their own strategic planning as four of the main issues to consider.

In particular, it was argued that fluctuations in oil prices were likely to influence the numbers of students coming to the UK from Kazakhstan, Azerbaijan, and Russia. 'We have to brace ourselves for problems recruiting from the more oil-based economies like Kazakhstan and Azerbaijan, and maybe from Russia itself as well because Russia is also facing economic difficulties' (12). The future trends, some thought, would be determined by the GDP growth in these countries (14). 'Obviously, Azerbaijan and Kazakhstan and Russia all have fairly healthy funded scholarship schemes although if the situation continues to be economically unsettled and the exchange rate continues to be different to what it was, that may change in itself' (4).

While some representatives at Russell Group HEIs thought that the numbers of mobile students from the region 'would either go up more steeply or stay the same' (6), representative at one HEI hypothesised that the numbers of incoming students would drop in the future as some of these countries would improve their own HE systems and fewer students would be inclined to leave their home countries (1).

The UK is currently the second most popular EU destination for students from Russia, Eastern Europe, Caucasus, and Central Asia, following Germany (UNESCO, 2014b). Some interviewees were concerned that increasing numbers of students in the future would choose HEIs in continental Europe and elsewhere if the UK government continued its anti-immigration discourse and that other countries may become much more appealing to students who aspire to study in an English-language environment: 'Certainly

countries like Canada and perhaps Australia and New Zealand and to a certain extent the US have got more flexible visa arrangements in place, which is more attractive to some students' (4). Although transnational education was not viewed as replacing direct student recruitment to the UK in the future, it was considered to be an increasingly viable way for students from the region to gain access to a "UK education": 'And we'll probably see more transnational agreements with universities in Central Asia' (4).

All HEIs interviewed were aware of the increasing competition for international students from this region and other parts of the world and were concerned about losing out on the brightest minds. At the same time, the majority of the HEIs indicated that they did not have a clearly formulated strategy for recruiting students from this region or more broadly. Even highly reputable Russell Group universities acknowledged that their recruitment strategies were not sufficiently well-developed and planned to invest into more strategic implementation of international student recruitment. The interview data collected for this study, therefore, confirmed the argument put forward by de Wit (2015) that internationalisation is a fragmented process that rarely follows a comprehensive strategy. A commonly held view among our respondents, however, was that the status quo of having no explicit recruitment strategy would need to change urgently as competition for international students is getting increasingly fierce.

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Appendices

Appendix 1. Numbers of internationally mobile students from 15 former Soviet countries enrolled at UK HEIs from 1995-1996 to 2013-14

Country of origin	1995/96	1996/97	1997/98	1998/99	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14
Lithuania	37	51	59	61	73	83	108	113	142	310	857	1384	1905	2341	2842	3808	4838	4962	4807
Russia	420	536	709	800	1002	1237	1416	1562	1695	1769	1897	2223	2446	2696	2930	2983	3268	3359	3676
Latvia	46	50	58	66	80	98	120	134	167	229	485	821	1102	1334	1601	1979	2201	2061	1814
Kazakhstan	51	63	73	105	131	132	174	231	250	292	373	806	1068	1443	1909	1999	1847	1623	1486
Estonia	39	43	53	58	60	73	97	95	83	160	330	465	640	799	926	1037	1206	1140	1149
Ukraine	87	153	174	219	274	304	355	424	421	440	416	419	451	480	571	612	763	852	975
Azerbaijan	11	14	28	35	45	47	58	68	74	73	105	144	161	198	274	390	542	608	748
Georgia	25	37	36	45	45	46	50	61	65	69	100	119	149	150	234	242	229	209	203
Belarus	10	27	27	48	79	55	59	72	80	92	94	124	135	139	142	147	161	185	162
Armenia	10	14	22	24	34	34	26	37	29	32	45	65	51	63	70	86	90	131	137
Uzbekistan	20	23	67	116	186	179	135	142	121	134	110	100	108	138	158	132	112	96	130
Moldova	5	7	17	21	21	21	46	53	61	57	62	76	70	81	103	106	106	86	92
Kyrgyzstan	4	3	10	14	20	25	24	35	61	61	64	76	63	79	61	63	55	66	78
Turkmenistan	1	1	4	7	8	12	15	13	23	19	26	36	40	42	51	56	56	60	76
Tajikistan	1	3	5	12	10	11	15	25	32	32	40	45	47	55	51	38	35	29	22
	767	1025	1342	1631	2068	2357	2698	3065	3304	3769	5004	6903	8436	10038	11923	13678	15509	15467	15555

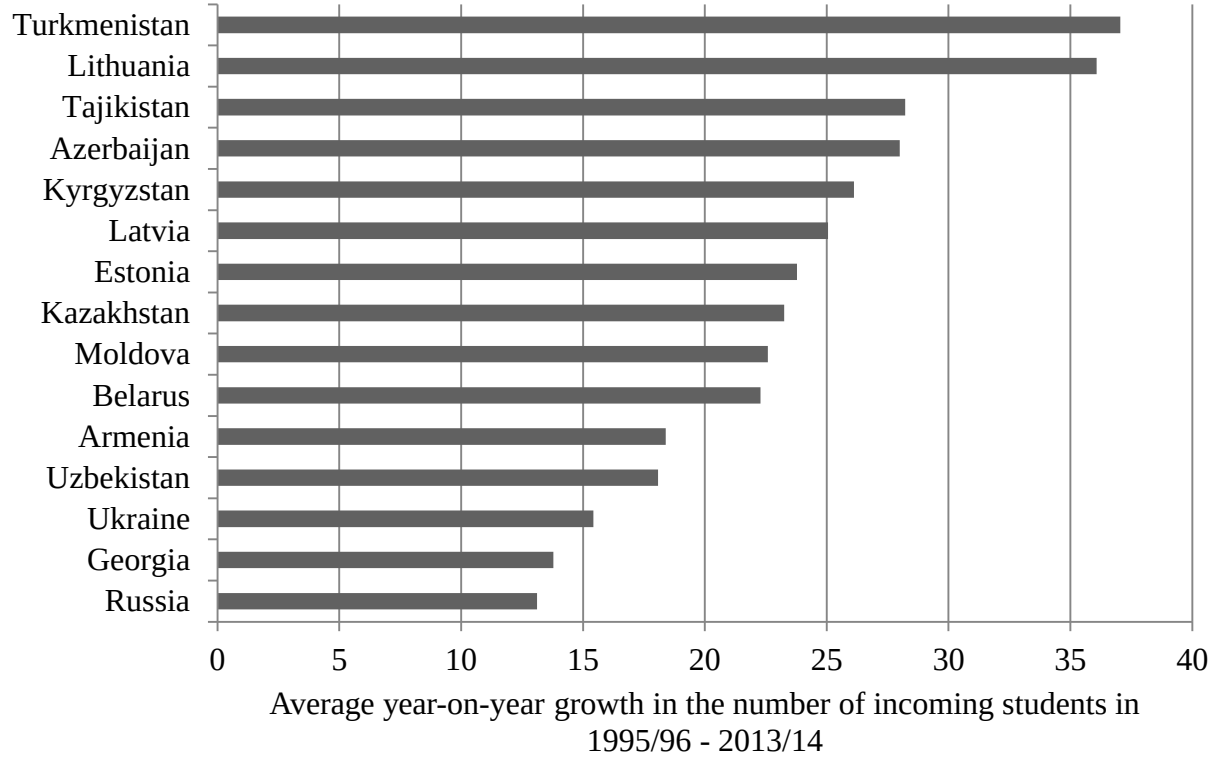
Source: own calculations based on HESA (2014) data

Appendix 2. Eight most popular destinations for degree mobile students from former Soviet countries

Country of origin	Outbound mobility ratio	Destination country I	Destination country II	Destination country III	Destination country IV	Destination country V	Destination country VI	Destination country VII	Destination country VIII
Moldova	14.2	Romania (7432)	Russia (4902)	Italy (2001)	Ukraine (1703)	France (825)	Germany (597)	Bulgaria (466)	USA (363)
Azerbaijan	9.1	Russia (10530)	Ukraine (7599)	Turkey (6989)	Georgia (860)	UK (638)	Germany (580)	USA (371)	Belarus (293)
Georgia	8.8	Kazakhstan (6639)	Canada (2655)	Germany (1852)	Ukraine (1517)	Armenia (1256)	Russia (1143)	Australia (580)	USA (436)
Uzbekistan	8.4	Russia (10211)	Kazakhstan (5588)	Ukraine (2072)	Kyrgyzstan (1219)	Germany (789)	USA (426)	Korea (411)	Malaysia (379)
Lithuania	7.5	UK (5041)	Denmark (1716)	Poland (950)	Germany (865)	Netherlands (496)	Russia (457)	USA (272)	France (260)
Latvia	6.7	UK (2084)	Denmark (823)	Germany (672)	Russia (658)	Netherlands (398)	USA (282)	France (168)	Finland (125)
Belarus	6.4	Russia (26434)	Poland (3413)	Lithuania (1894)	Germany (1173)	Czech Republic (577)	Italy (502)	Ukraine (461)	France (351)
Estonia	6.4	UK (1152)	Finland (538)	Germany (489)	Denmark (450)	Russia (388)	USA (209)	Netherlands (138)	Sweden (133)
Kazakhstan	6.3	Russia (35106)	Kyrgyzstan (4357)	USA (1884)	UK (1725)	Czech Republic (1174)	Malaysia (1089)	Germany (695)	Poland (401)
Armenia	5.6	Russia (3602)	France (824)	Ukraine (604)	Germany (418)	USA (330)	Greece (214)	UK (145)	Italy (119)
Tajikistan	5.0	Russia (6458)	Kyrgyzstan (885)	Kazakhstan (476)	Ukraine (422)	Saudi Arabia (385)	Turkey (364)	USA (299)	Egypt (215)
Kyrgyzstan	2.1	Russia (3215)	Kazakhstan (963)	Germany (494)	Saudi Arabia (361)	USA (250)	Tajikistan (162)	Egypt (109)	France (89)
Ukraine	1.8	Russia (9586)	Poland (9485)	Germany (5444)	Italy (1903)	Czech Republic (1876)	USA (1426)	Hungary (1269)	France (1128)
Russia	0.7	Germany (9480)	USA (4688)	France (3643)	UK (3604)	Czech Republic (3455)	Ukraine (2930)	Finland (2206)	Belarus (2128)
Turkmenistan	No data	Ukraine (14053)	Russia (10128)	Belarus (8153)	Turkey (5887)	Kazakhstan (1090)	Kyrgyzstan (369)	Azerbaijan (177)	USA (170)

Source: own calculations based on UNESCO (2014b) data

Appendix 3. Average annual growth in numbers of degree-mobile students to the UK from 1995-96 to 2013-14



Source: own calculations based on HESA (2014) data