COMPARATIVE ANALYSIS OF GLOBAL STUDENT MOBILITY ON THE EXAMPLE OF COMPETITIVE CHALLENGES FOR SOUTHEAST EUROPE

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ABSTRACT:
International mobility of students has become one of the key aspects of globalization of higher education, with member countries of the Organization for Economic Cooperation and Development (OECD) occupying a dominant role as leading destinations for international students. This paper analyzes current trends in international student mobility in OECD countries, identifies the countries that attract the largest number of students, and examines the factors that contribute to their attractiveness, including the quality of education, financial conditions, immigration policies, and the labor market. A special focus is placed on the possibilities of Southeast European countries to attract a larger number of international students within the context of rising education costs in some developed countries and changes in global educational migration. Using a comparative analytical approach and a secondary data analysis, the paper examines the strengths and limitations of universities in the Southeast European region, as well as strategies that could improve their competitive position in relation to leading OECD destinations. The research conclusions indicate that universities in the region of Southeast Europe, with adequate reform policies, adjustment of academic programs and proactive internationalization strategies, can become increasingly significant participants in global academic mobility.

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Introduction

International student mobility has become a defining characteristic and a central economic engine of the contemporary globalization of higher education. Although internationalization in higher education is sometimes mistakenly equated with globalization in higher education, internationalization represents a set of activities that higher education institutions undertake to cope with the global academic environment (Altbach & Knight, 2007), while globalization is a much broader concept that represents significantly more complex social, economic, and political influences on higher education systems. Unlike globalization, which occurs without the influence of higher education institutions, internationalization is a process based on the initiative of higher education institutions themselves. In a way, globalization opens up the possibility for students and academics to study and work anywhere in the world, but, at the same time, it reinforces existing inequalities and raises new barriers (Altbach, 2004).

Over the past five decades, driven by increasing globalization, regionalization, and the demands of the knowledge economy, internationalization in tertiary education has transitioned from a marginal pursuit to a central, strategic reform agenda supported by major international and governmental bodies, including the European Union, Organization for Economic Cooperation and Development (OECD), and UNESCO (de Wit & Altbach, 2021).

This vast transnational movement of scholars is not merely an academic phenomenon but a significant economic activity. The income generated for host countries is measured in tens of billions of euros annually, derived from direct sources like tuition fees, and amplified by indirect expenditures, including living expenses, over the duration of a student's study period. The rising population of students from abroad has made higher education a major export sector of the US economy, generating $44 billion in export revenue in 2019, with educational exports being about as big as the total exports of soybeans, corn, and textile supplies combined (Bound et al., 2021, p.163).

However, this global mobility system is marked by profound structural inequalities. Irrespective of enrolment in the most elite institutions, the aggregate expenses of international residency and academic pursuit establish a fundamental and insurmountable barrier to participation for those within the lower socio-economic deciles. Globalization tends to concentrate wealth, knowledge, and power, while international academic mobility similarly favors well-developed education systems and institutions, thereby compounding existing inequalities (Altbach & Knight, 2007, p.291). Therefore, it is not surprising that member countries of the OECD occupy a dominant role as the leading global destinations for international students. Education is built on class relations and reflects, reinforces, and replicates the tendency of capital to produce and reproduce inequalities (Hill et al., 2009).

A dual challenge resulting from globalization impacts global higher education systems: while the expenses associated with tertiary education continue to escalate in the most developed nations, their less-developed and developing counterparts simultaneously contend with the debilitating effect of intellectual capital flight, commonly known as 'brain drain'. This phenomenon involves the emigration of highly talented and successful academics, researchers, and students toward developed economies in pursuit of enhanced opportunities, a dynamic that ultimately compromises the academic and scientific capacity of the sending nations. Most international students pay for their own studies, producing significant income for the host countries - and a drain on the economy of the developing world (Altbach, 2004, p.12). This economic outflow is compounded by the structural difficulty of reintegrating highly trained professionals into nascent domestic labor markets. Without appropriate jobs, developing countries will lose this much-needed intellectual capital, their brightest children, in whom they have invested enormously through elementary and secondary education and sometimes even through college, to developed countries (Stiglitz, 2006, p.51). The brain drain, uneven economic distribution of gains from the internationalization of higher education, coupled with educational aid policies funding international students and the commercialization of the education sector contribute to the deepening of differences between developed and undeveloped regions and countries (Adnett, 2010; Filijović et al., 2011).

The established dominance of OECD countries stems from a confluence of attractive factors, including the perceived high quality of education, favorable financial conditions, supportive immigration policies, and robust post-graduation labor markets. Nevertheless, the global landscape of educational migration is shifting. In the evolving international education market, a host country's ability to attract international students will increasingly depend on its 'pull' factors, making the awareness, reputation, and quality of its institutions, especially as influenced by alumni word-of-mouth, the most critical elements in study destination choice (Mazzarol & Soutar, 2002). When talking about international students' motivation for studying abroad, it is important to distinguish between students who spent a short period of their studies in mobility (exchange students) and students who undertake a full degree abroad (long-term international students), since their motivation is significantly different (Hovdhaugen & Wiers-Jenssen, 2023; King & Raghuram, 2013; Vasojević, 2025). In this paper, we'll focus on long-term international students. Given the fact that this category of international students usually spends several years living abroad during the period of study (depending on the study cycle and on the duration of study program), their consideration of living and tuition costs is much more important than that of exchange students. Due to rising education and living costs in traditionally leading destinations, as well as changes in geopolitical and domestic policies (Beine et al., 2014; Mok et al., 2024), increasing opportunities for attracting students are emerging in non-traditional regions (Apsite-Berina et al., 2023). This paper focuses on the key issues of competitive challenges and opportunities for universities in Southeast Europe (SEE)[1] to attract a larger number of international students in light of these global changes.

To address this challenge, this paper undertakes a comparative analysis of current trends in international student mobility. Specifically, it analyses the factors that contribute to the attractiveness and competitive edge of leading OECD destinations. Following this examination, the research analyses the available statistical data to evaluate the existing strengths and inherent limitations of universities

[1] For the purposes of this study, Southeast Europe refers to Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Montenegro, North Macedonia, Romania, and Serbia.

across the Southeast European region. The main goal is to formulate strategic recommendations, including necessary reform policies, adjustments to academic programs, and proactive internationalization strategies, that could improve the region's competitive position and enable universities in Southeast Europe to become increasingly significant participants in global academic mobility.

1. Methodology

1.1. Research Design and Approach

This paper employs a quantitative research design utilizing a comparative analytical approach and a secondary data analysis method. This approach provides access to large amounts of information and a broad population for analysis (Vartanian, 2011). The secondary data analysis methodology was implemented with full awareness of its perceived constraints, requiring a rigorous approach to address core issues such as evaluating data quality and minimizing the risk of conceptual misalignment (Murphy & Schlaerth, 2010; Vartanian, 2011). The primary objective is to evaluate the competitive position of the Southeast European (SEE) in the global landscape of international student mobility relative to the established leaders within the OECD. The analysis is structured into two main phases: first, establishing a benchmark of success by analysing mobility trends and 'pull' factors in leading OECD destinations; second, conducting a gap analysis to identify the strengths, limitations, and strategic opportunities for universities in the SEE region.

The core of the methodology is the systematic collection and interpretation of macro-level statistical data related to international student flows, destination choice determinants, and country-level educational metrics.

1.2. Data Sources and Scope

The analysis relies on publicly available, internationally recognized statistical databases, ensuring consistency and comparability across diverse geographic regions. The principal sources of data utilized for this study include OECD statistics and the UNESCO Institute for Statistics (UIS) Database. The sources of data are recognized as reputable organizations with high quality of data sets (Vartanian, 2011). These resources provide detailed, standardized data on educational attainment, financial investments in education, and, critically, statistics on international student enrolment across OECD and SEE countries. This data allows for the calculation of inflow and outflow rates for both host and origin countries.

The study primarily focuses on the period between 2018 and 2023, a timeframe selected to capture recent pre-pandemic trends, the impact of the COVID-19 disruption, and the subsequent recovery and shift in global educational migration patterns. Key data points collected include:

- Total number of international student enrolments in OECD and SEE countries.
- Growth rates in international student numbers.
- The primary host countries for international students.
- The primary origin countries of international students.

1.3. Analytical Framework

The comparative analysis is executed through three systematic steps:

1. Benchmark Establishment: Utilizing OECD data, the defining characteristics of leading host countries (academic quality, post-study work policy, cost of living/tuition) are quantified and synthesized to form a benchmark of competitive success.
2. Comparative Profiling of SEE: Data on international student enrolment and growth is collected for countries in SEE. This profile is then measured against the established OECD benchmark.
3. Gap and Opportunity Analysis: A qualitative-quantitative synthesis is performed to identify the specific gaps between the SEE profile and the OECD benchmark. This analysis examines areas where the SEE region can leverage global changes (e.g., rising costs in traditional destinations) by adopting proactive internationalization strategies.

The conclusions and recommendations derived from this methodology are grounded in statistical observation, aiming to provide evidence-based insights for improving the competitive standing of Southeast European universities in the context of rising global student mobility.

2. Significance and Determinants of International Student Mobility

2.1. Global Trends in International Student Mobility

The twenty-first century has witnessed an exponential increase in international student mobility (De Wit & Altbach, 2021), solidifying its role as a key driver in the globalization of higher education. This trend underscores not only the growing demand for quality education worldwide but also the recognition of higher education as a tradable commodity. The scale of this movement is most evident within the OECD member states. The total number of international students hosted by the 38 OECD members increased substantially from 3 million in 2014 to over 4.6 million by 2022 (OECD, 2025). Notably, this robust growth persisted despite the profound disruptions caused by the COVID-19 pandemic, with student numbers rising by 18% between 2018 and 2022. During this period, only five countries

(Australia, Denmark, Italy, New Zealand, and the USA) experienced a decrease in international student figures, mostly because of restrictive immigration measures during the pandemic. Conversely, countries like Chile and Slovenia saw the largest relative increases, with their number of international students nearly doubling, reflecting emerging shifts in destination preferences (OECD, 2025). During the COVID-19 pandemic, some of the leading scholars in internationalization, such as Altbach and De Wit were not optimistic about internationalization bouncing back so fast and argued that 'such optimism is naïve' (de Wit & Altbach, 2022).

The global landscape of international student mobility is characterized by a significant concentration of both host destinations and student origins, a pattern that defines the competitive environment for emerging markets like Southeast Europe. Globally, the wave of international students flows from East to West and from South to North, while opportunities mainly benefit students from high-income families (de Witt, 2021). As host destinations, Australia, Canada, France, Germany, the United Kingdom, and the United States continue to exert an unparalleled gravitational pull, collectively hosting nearly two-thirds of all international students in the OECD (Marginson, 2012, OECD, 2025). The number of inbound international students in top six countries destinations were analysed for the period 2018-2023 based on data available in UNESCO database (UNESCO, 2025).

Table 1. *International students in top host countries (2018-2023)*

Country	2018	2019	2020	2021	2022	2023
Australia	444,514	509,160	458,279	378,439	382,007	467,074
Canada	224,548	279,168	323,157	312,630	336,837	389,181
France	223,623	246,378	252,444	252,856	263,458	276,217
Germany	311,738	333,233	368,717	376,359	403,473	423,197
UK	452,079	489,019	550,877	600,589	674,931	748,461
USA	987,313	n.a.	957,475	833,204	n.a.	956,923

Source: UNESCO Institute for Statistics (2025).

As illustrated in Table 1, the United States maintains the largest share of international students, accounting for over 20% of all inbound mobility within OECD nations. Conversely, the United Kingdom, positioned second, experienced substantial growth during the observed six-year period—increasing its enrolment by nearly 300,000 students. Notably, this upward trend persisted despite the global disruptions caused by the COVID-19 pandemic. The nations represented in Table 1 traditionally dominate global rankings as primary host countries, a position sustained not only by their expansive higher education systems but also by the high quality of their institutions and the prevalence of top-ranked universities. In 2023, these six nations collectively hosted 3.26 million international students, accounting for approximately 71% of the 4.6 million students across all 38 OECD member states. Furthermore, it is noteworthy that four of these leading destinations are Anglophone. Given these structural disparities, emerging regions such as Southeast Europe cannot be directly compared to these ‘top six’ host countries. Consequently, the following analysis shifts focus toward the strategies employed by smaller OECD nations, with particular emphasis on non-Anglophone contexts.

South Korea, the Netherlands, and Türkiye together host a further 18% of mobile students, demonstrating the presence of distinct regional or strategic mobility hubs. But these three countries have some very different strategies for future internationalisation in higher education. Korea has implemented policies such as the Study Korea 300K Project, aiming to host over 300,000 international students by 2027, and university-industry collaboration initiatives like the Glocal University 30 Project to align education with labor market needs (Huang et al., 2025). Through active promotional campaigns and dedicated scholarship programs, Türkiye has established itself as a leading destination for students originating from the Middle East, Central Asia, and North Africa. Türkiye attracts international students primarily from its neighboring countries, the Middle East, and Africa, a trend largely driven by sociological, cultural, and economic factors, as well as the higher expense and more stringent prerequisites for studying in North American and Western European countries, though students from Europe tend to have higher graduation rates (Mutlu, 2024; Özoğlu et al., 2015). In contrast to those approaches, the Netherlands’ policy shifts toward decreasing the number of international students, with ‘new measures in place to control the number of English-taught programs and the influx of international learners’ (Condette & De Witt, 2023). This policy shift follows a prolonged period of high international enrolment, which has placed significant pressure on the Netherlands’ limited infrastructure. In a country of its scale, the influx has contributed to a sharp rise in housing costs and a tightening of the rental market. Furthermore, the proliferation of English-taught programs has sparked concerns regarding the marginalization of Dutch-language programs within the national curriculum.

It is noticeable that the student origin countries also remain unchanged for decades, which directly impacts the strategic priorities of host destinations. China and India remain the biggest sources of internationally mobile students, together accounting for around 30% of the total. Vietnam has also emerged as a top-five origin country, highlighting demographic and economic shifts that fuel outward mobility. China and India have dominated inflows into many of the English-speaking countries, whereas the US, UK, France, and Australia remain important destination countries (King & Raghuram, 2013). A detailed analysis of the top sending countries between 2018 and 2022 (OECD, 2025) reveals persistent patterns of flow, dominated by large, rapidly developing economies where the demand for world-class tertiary education outstrips domestic supply.

Table 2. *Top countries of international students' origin*

2018			2022		
Country	Number of international students	Share of total number	Country	Number of international students	Share of total number
China	903,825	23.0	China	862,767	18.7
India	316,451	8.1	India	524,548	11.3
Germany	115,494	2.9	Vietnam	128,471	2.8
Vietnam	104,261	2.7	Germany	121,609	2.6
South Korea	96,603	2.5	France	108,185	2.3
France	93,899	2.4	USA	93,195	2.0
Italy	69,848	1.8	Nigeria	85,764	1.9
Saudi Arabia	69,305	1.8	South Korea	82,384	1.8
Nepal	68,675	1.7	Italy	79,574	1.7
USA	64,574	1.6	Nepal	79,051	1.7

Source: OECD (2025).

As detailed in the Table 2, China and India remain the undisputed leaders in student outflow. In 2018, China accounted for the largest share of total international students at 23.0%. While its absolute number decreased slightly by 2022, its share remained substantial at 18.7% (862,767 students), confirming its position as the single largest source market. Simultaneously, the outbound mobility from India saw a dramatic surge, increasing for more than 3%. The combined volume from these two countries reinforces the strategic importance of focusing internationalization efforts toward the Asia-Pacific region, but we also have to keep in mind that those two countries are the most populated countries of the world. Furthermore, the destinations of these students are highly selective: over two-thirds of Chinese and Indian students studying abroad enrol in just five countries: Australia, Canada, Japan, the United Kingdom, and the United States (OECD, 2025).

The omission of Saudi Arabia from the top ten destination list and the rising prominence of Vietnam and Nigeria that we see in Table 2 were trends scholars had foreseen years before. Global student mobility is diversifying, with growth in Vietnam, Nigeria, and India offsetting declines in Saudi Arabia and China; the demand for measurable career returns will intensify to validate the financial investment of studying abroad (Choudaha, 2017). Notably, Vietnam experienced considerable growth, moving from the fourth place with 104,261 students in 2018 to the third place with 128,471 students in 2022, underscoring the dynamic nature of mobility in Southeast Asia. A shift from political to socio-economic drivers, that is to say, structural 'push' factors and individual 'pull' motivations, has popularized international education among Vietnam's self-funded middle class (Hong Nguyen, 2013).

The emergence of Nigeria as a top-ten origin country in 2022 (ranked seventh) further signals the growing potential of African student markets. This surge in outbound mobility is primarily driven by powerful 'push' factors based on systemic domestic educational instability, including domestically underfunded universities, frequent academic strikes, and the pursuit of better career opportunities (Okunade & Awosusi, 2023). This strong external drive is compounded by the fact that Nigeria possesses one of the highest percentages of youth population in the world. This situation stands in sharp contrast to countries like South Korea and Japan, which are 'facing declining youth populations, prompting governments to implement strategic policies to sustain enrolment and enhance institutional competitiveness' (Huang et al., 2025, p. 41). Beyond the top two, the composition of the leading ten origin countries highlights diverse regional contributions. France, Germany, and Italy, despite being European destinations themselves, also feature as significant origin countries although their relative share is smaller. This mobility is often driven by well-established cultural and academic exchange programs, but also by limited access to top institutions and perceived overcrowding in open-access universities within their home countries (OECD, 2025). The analysis of these origin countries provides crucial intelligence for any region, including Southeast Europe, seeking to expand its international student base. Successfully competing for international students requires targeted recruitment strategies that align institutional strengths with the specific needs and academic goals of students emanating from these high-volume source countries.

2.2. Qualitative Characteristics of Student Mobility

International student mobility is not uniformly distributed across all academic levels or fields of study. The propensity for students to seek education abroad significantly increases with the level of higher education. On average, international students account for only 5% of bachelor degree students, but this share triples at the master's level to 15% and increases fivefold for doctoral students, reaching approximately 25% (OECD, 2025). This gradient suggests that host countries, particularly those aiming to attract highly skilled labor and contribute to advanced research, should strategically focus recruitment efforts on postgraduate programs.

Furthermore, a significant qualitative trend is the pronounced preference for Science, Technology, Engineering, and Mathematics (STEM) fields among internationally mobile students (Adhikari, 2017; Chang et al., 2022). STEM fields are more popular among international students (30% of total enrolment) than they are among domestic students (19% of total enrolment) (OECD, 2025). This statistical preference has critical implications for developing recruitment strategies, particularly in regions like Southeast Europe, which could leverage specific institutional strengths in technical or scientific disciplines to attract this high-value cohort. The preference of international students for STEM fields is also observed in post-doctoral studies (Mendez & Watson, 2023).

2.3 Factors Driving Destination Attractiveness

The enduring dominance of OECD countries in the international education market is directly attributable to a complex interaction of 'pull factors', the characteristics that make a country or institution highly attractive to international students. These factors can be grouped into four primary categories: academic quality, economic considerations, post-study opportunities, and socio-cultural environment. Motivation for international student mobility varies significantly by field of study, with pragmatic reasons like domestic restrictions driving choices in certain fields (e.g., medical education) and 'pull' factors like language skills or career prospects dominating others, ultimately suggesting that the traditional push/pull dichotomy is too simplistic (Hovdhaugen & Wiers-Jenssen, 2023).

The decision to pursue education abroad is influenced by complex mixture of different 'push' and 'pull' factors, one of the most important ones being economic factors, with two-thirds of internationally mobile students originating from high-income or upper middle-income countries (OECD, 2025). This highlights the fact that studying abroad is generally reserved for populations with sufficient disposable income.

The perceived and measured quality of higher education is arguably the most significant pull factor (Mazzarol & Soutar, 2002). Leading OECD destinations host numerous globally recognized universities, whose high standing is consistently reflected in international university rankings. Furthermore, the commitment to research excellence, the availability of specialized programs, and the adoption of similar policies that encourage student mobility and regional cooperation (e.g., scholarships and operational agreements) enhance their academic appeal.

While international education represents a significant financial investment, the ultimate return on investment is a critical determinant (Yue & Lu, 2022). Students often choose destinations where the total cost of tuition and living expenses is justifiable by the expected career outcomes (Hawthorne, 2010). Although some OECD nations are expensive, they often offer competitive financial incentives, including state-funded education, as in some continental European countries, extensive scholarship opportunities, and the implicit value of a globally portable degree. Conversely, social inequality inclines (Di Pietro, 2020) and the high cost of studying abroad restrict this mobility primarily to students from upper or middle-class income backgrounds, especially those self-funding their studies, which disproportionately affects developing countries (Gutema et al., 2024).

For many students, the primary goal of international education is not simply the degree, but access to superior labor markets and permanent residency opportunities (Beech, 2018; Hawthorne, 2010). The most attractive host countries offer favorable immigration policies and transparent pathways to post-study work visas or permanent residency. These policies transform a temporary educational sojourn into a potential long-term migration strategy, significantly increasing the destination's overall value proposition. The promise of utilizing newly acquired skills in an advanced economy and contributing to the host country's intellectual capital pool, mitigating the 'brain drain' concern for the host country, is a powerful draw. While financial and structural factors shape international study choices, empirical research shows that they are insufficient on their own, as students' decisions are also driven by autonomous motivations linked to identity, self-realization, and perceived personal value rather than purely instrumental benefits (Yue & Lu, 2022).

The local environment, including language, safety, cultural tolerance, and the availability of support services for international students, plays a key, though often underestimated, role. The findings of some research emphasise the significance of factors such as the quality of education, visa requirements, academic reputation, tuition fees, availability of scholarships, job opportunities, social, economic, environmental, individual, and cultural issues, as well as language barriers (Gutema et al., 2024). Destinations featuring widely spoken languages such as English, French, and German, naturally have a competitive advantage as confirmed by the data given in Table 1. English-speaking countries are at the top of the list of states with the highest number of international students. The English language has established itself as the dominant language of higher education and the most prevalent foreign language in educational systems worldwide (Unangst et al., 2022; Altbach, 2004). This is further evidenced by the fact that in countries where English is not the native language, over 8,000 study programs are offered in English (Mitchel, 2016; according to: Unangst et al., 2022). Furthermore, a welcoming, safe, and culturally diverse environment ensures a smoother transition and a more productive study period, influencing the overall student experience and their willingness to recommend the destination to peers.

At the same time, 'push' factors heavily impact students' decision to study abroad, such as limited access to education in their own country (Mazzarol & Soutar, 2002; Okunade & Awosusi, 2023), or perceived lower quality of domestic higher education and weak perspectives for future employment (Hong Nguyen, 2013).

3. The Competitive Position of Southeast Europe in Global Student Mobility

To examine the competitive standing of Southeast Europe, we conducted a longitudinal analysis of international student enrolment from 2018 to 2023 across seven major countries in the region: Albania, Bosnia and Herzegovina, North Macedonia, Serbia, Bulgaria, Croatia, and Romania (UNESCO, 2025)[2]. The data reveals highly uneven distribution and growth trajectories within the region, positioning the SEE countries as emerging, yet comparatively small, participants in the global academic market.

Table 3. *International Student Enrolment in Southeast Europe (2018–2023)*

Country	2018	2019	2020	2021	2022	2023
Albania	1,969	2,244	2,246	2,088	1,872	2,012
Bosnia and Herzegovina	7,083	6,334	5,454	5,501	5,691	6,081
Bulgaria	15,155	16,499	17,575	18,125	19,162	19,250
Croatia	5,014	5,722	4,768	4,290	5,735	5,929
North Macedonia	3,096	2,942	2,812	4,103	4,707	6,178
Romania	29,112	30,294	32,560	33,775	34,772	36,216
Serbia	11,361	11,505	11,419	10,946	11,247	11,419
Total	72,790	75,540	76,834	78,828	83,186	87,085

Source: UNESCO Institute for Statistics (2025).

Table 3 shows that the total number of international students in SEE countries slightly exceeds 87,000, which is only 1.9% of the total international student population in OECD countries. This comparison highlights the relatively small scale of international student enrolment in the SEE region, even though none of the analyzed countries are OECD members. While acknowledging the substantially smaller structural scale of higher education systems in SEE countries relative to the top six OECD host destinations, the region's current international student enrolment figures remain conspicuously modest.

The analysis, visually supported by the enrolment trends over the period in Table 3, reveals that Romania and Bulgaria are the definitive market leaders in SEE. Romania consistently enrols the largest number of international students, surpassing 36,000 by 2023, exhibiting a continuous growth trajectory throughout the period. The creation of a unique promotion umbrella, Study in Romania, helped univer-

[2] Data on international students in Montenegro was not available in the UNESCO database at the time of analysis. Greece was excluded due to its distinct higher education internationalization profile as a long-term European Union member, which limits comparability with other South East European countries.

sities join forces and supported the development of internationalization strategies at more than 25 universities and the implementation of specific funding schemes for internationalization, leading to an increase in the number of international students (Fit & Haj, 2022, p.103). Bulgaria follows as the second-largest destination, steadily increasing its enrolment to over 19,000 students in 2022 and 2023, demonstrating robust stability despite the pandemic years. Countries like Bulgaria, which used to primarily send students abroad, have developed strategies to attract international students by becoming part of the global commodification of higher education, where the significantly lower fees and living costs are the main factors motivating students to access their desired profession, obtain an EU degree,, and benefit from easier admission and graduation procedures, rather than seeking a 'world class university' (Markov & Periklieva, 2023). It is important to note that the 2007 accession of Romania and Bulgaria to the European Union served as a critical catalyst for their growing appeal as destinations for international students.

As per Table 3, Serbia maintains a substantial, yet relatively stagnant, base of approximately 11,000 international students, showing minimal fluctuation across the six years. The remaining countries, Albania, Bosnia and Herzegovina, North Macedonia, and Croatia, operate on a smaller scale, each hosting fewer than 7,000 students annually. The Serbian government initiated the 'World in Serbia' program in 2010, which offers scholarships to international students studying at Serbian universities (Predojević Despić, 2025; Vasojević, 2025). This program evidently had a positive impact on international students' motivation to study in Serbia, a finding supported by the research that ranked the scholarship as the second-highest-ranked 'pull' factor for international students in the country (Vasojević, 2025).

The current academic literature demonstrates a disparity in the scholarly attention given to international students across SEE countries. While Romania and Serbia are the subjects of numerous studies and publications (Despić, 2025; Fit & Haj, 2022; Nisipeanu-Biliga, 2025; Vasojević, 2025; Vasojević, 2024; Iorga, 2021; Tirban et. al., 2012), with Bulgaria receiving attention to a lesser extent (Makni, 2011; Markov & Periklieva, 2023), there remains a significant gap in research concerning Albania, Bosnia and Herzegovina, North Macedonia, and even Croatia. The existing research in Croatia predominantly focuses on short-term exchange students in ERASMUS programs (Palfi et al., 2023; Senci et al., 2022; Vulić-Prtorić & Oetjen, 2017). Conversely, studies related to Albania are largely concentrated on outbound international students and the resulting issue of 'brain drain' (Gërmenji & Milo, 2011; Danaj, 2019; King & Gëdeshi, 2023). In Bosnia and Herzegovina, there are no specific scientific studies regarding international students in the country, while there are just a few about students in mobility programs (Stojkić & Gabrić, 2018), or internationalization in higher education in general (Markovic et al., 2021).

While the total number of international students in the SEE region grew from approximately 72,790 in 2018 to over 87,000 in 2023, their share of the total student population remained low, bellow 1.9%. The average annual growth rate in the SEE region was about 3.7%, which is lower than the growth observed in leading host countries such as Canada (11.5%), the UK (10.7%), and Germany (6.3%), and comparable to or slightly below France (4.3%) and Australia (1.0%). This highlights both the relatively limited scale and pace of internationalization in SEE countries (see Chapter 2.1. for OECD data). Countries like Albania, Bosnia and Herzegovina, and Croatia experienced notable volatility, particularly during the COVID-19 period (2020-2021), indicating a possible sensitivity to external shocks and perhaps less resilient international recruitment pipelines compared to the regional leaders. Despite the positive growth in total numbers, the entire SEE region's total enrolment is still significantly smaller than that of many single, mid-tier OECD host countries, let alone the global leaders (US, UK, Australia), each of which hosts hundreds of thousands of international students.

The competitive challenge for SEE countries, therefore, is twofold: first, to understand and replicate the success factors driving the growth in Romania and Bulgaria (keeping in mind that the EU membership plays a significant role); and second, to identify niche competitive advantages that allow them to attract students away from the highly established and attractive OECD destinations. There is a long and successful history of international students studying in some SEE countries. In the early 1980s, Romania was among the top 15 countries worldwide providing academic services for international students, many coming from Middle East, especially in the field of medicine (Fit & Haj, 2022). A highly similar historical context existed in former Yugoslavia, which hosted numerous international students predominantly originating from countries within the Non-Aligned Movement. In the period between 1950 and 1990, 15,364 international students from 119 different countries studied at Serbian universities (Vasojevic, 2024).

3.1. Potential Benefits of Enhanced Internationalization for SEE

With adequate and targeted policies, universities in Southeast Europe can become more significant participants in global academic mobility. The benefits of achieving this goal extend far beyond mere enrolment figures, providing comprehensive returns to institutions, national economies, and the academic environment.

Despite being actively solicited as desirable migrants who possess and develop valuable skills, international students are, simultaneously, targets of increasing suspicion, creating a paradox where they are both desired yet treated with disdain in migration policy (King & Raghuram, 2013).

The blend of varied academic backgrounds and problem-solving approaches actively fosters creativity and innovative thinking in research and academic work (Luo & Jamieson-Drake, 2013). In the long term, this international exposure contributes to the expansion of alumni networks and the improvement of positions in international rankings. International students provide numerous advantages to academic departments, including filling research assistant openings, assisting the faculty in developing international relationships, and offering domestic students a more authentic view of their life situations.

On the financial side, attracting international students results in significant economic gains (Kamm et al., 2022) not only for higher education institutions, but the society in general. This revenue can be directly channeled toward the development of scientific research, innovations, equipment, and laboratories. Indirectly, the presence of international students generates a direct economic stimulus for the local community (e.g., housing, retail, services). Ultimately, internationalization plays a key role in attracting talents and contributing to the national workforce, thereby mitigating the negative effects of the domestic 'brain drain'.

3.2. Caveats in Data Interpretation: The Role of Linguistic and Ethnic Proximity

A critical nuance in interpreting international student data for SEE, particularly for countries such as Serbia, Bosnia and Herzegovina, Croatia, and Albania, is the influence of linguistic and ethnic proximity on student mobility. Unlike benchmark OECD destinations, which attract a significant percentage of students through global academic reputation and post-study work opportunities, a substantial portion of cross-border enrolment within the SEE region is driven by factors distinct from classic internationalization mechanisms. For instance, a significant number of students enroled in Serbia originate from neighboring countries, including Bosnia and Herzegovina and Montenegro. These students often share linguistic backgrounds and national community ties, which substantially reduce barriers to entry, integration, and academic study. The influence of Serbia on the higher education system in the Republic of Srpska (RS) is evidenced by the fact that secondary school graduates from one-third of all cities and municipalities (20 local administrative units) in the Republic of Srpska prefer to pursue their studies in Serbia rather than at universities within the RS (Маринковић et al., 2023:175). The research similarly confirmed that the Croatian diaspora in Canada functions as a comparable pool of prospective international students for Croatian universities (Sršen et al., 2019). A comparable concentration is observed in Romania, where data from the last 20 years revealed that between 63% and 71% of all international students originated from neighboring Moldova (Nisipeanu-Biliga, 2025), a reflection of strong cultural and linguistic ties between the two countries. In Bulgaria, there is a substantial community of international students of Bulgarian origin coming from Serbia, North Macedonia and Ukraine (Markov & Periklieva, 2023).

While these enrolments contribute to the quantitative totals in Table 3, they must be interpreted cautiously, as these proximity-driven flows often represent intra-regional educational migration rather than a true global academic competition. This distinction is vital for competitive analysis: the number of truly globally mobile students (defined here as those traveling long distances and crossing major cultural or linguistic barriers) may be inflated by these regional flows, thus masking the severity of the challenge when competing with globally recognized OECD destinations. Further research is necessary to disaggregate these proximity-based enrolments from those driven by global market forces. However, this regional clustering is not unique to the SEE region. A significant trend in international education is for students to remain within their home regions, where, in 2020, almost one-third (29%) of international students in OECD countries originated from the same broad geographical area (Kamm et al, 2022). Choudaha also perceived that almost 20% of all international students want to stay close to their home country (Choudaha, 2017).

4. Research Conclusions and Policy Recommendations

4.1. Synthesis of Findings

The comparative analysis confirms that international student mobility is an essential, continuously expanding aspect of the globalization of higher education. Global mobility flows exhibit a clear and persistent concentration on leading OECD destinations (Australia, USA, UK, Canada, France, and Germany) and are heavily sourced from key origin countries (China and India). These global patterns establish a high competitive standard defined by institutional prestige (Mazzarol & Soutar, 2002), strong post-study employment prospects, and streamlined immigration policies (Lulle & King, 2016).

The analysis of SEE countries (Albania, Bosnia and Herzegovina, North Macedonia, Serbia, Bulgaria, Croatia, and Romania) reveals a sub-market defined by smaller volumes and high regional dependency. While the total number of international students in SEE is growing, a significant portion of this growth is driven by linguistic and ethnic proximity since some of the students are moving between neighboring countries. This indicates that the current success of SEE is based more on intra-regional migration than on global competitive factors.

A key conclusion is that SEE is not in direct competition for the same cohort of students targeting 'Ivy League' or top-tier research universities. Instead, the region's potential lies in attracting the vast, financially-conscious market seeking quality education with financial accessibility in a culturally rich European environment. Romania is an attractive study destination because its EU membership facilitates mobility and degree recognition, while its lower overall cost of living, availability of diverse programs (especially medicine and engineering) taught in English and French, and the presence of diaspora communities are reinforced by the improved international reputation of its universities (Nisipeanu-Biliga, 2025). Similar beneficial 'pull' factors and competitive advantages may be leveraged by other higher education systems throughout the region, which warrants further examination to identify their broader regional potential.

4.2. Policy Recommendations and Strategic Imperatives

Building directly on the comparative analysis presented in Sections 2 and 3, this section translates the study's key findings into a set of policy recommendations and strategic imperatives. As demonstrated in Section 2, rising education and living costs in traditional host countries, together with evolving geopolitical and domestic policy conditions, are reshaping global student mobility patterns. Section 3 further highlights how these dynamics create emerging competitive opportunities for non-traditional regions. Within this analytical framework, the following recommendations are explicitly derived from the structural advantages and constraints identified in the preceding sections and are intended to inform more strategic, sustainable, and context-sensitive approaches to international student recruitment and positioning.

Building upon the findings of the previous chapters, which highlighted the saturation of proximity-based recruitment and the demographic challenges facing domestic enrolment, one possible response for developing countries is to try to increase the quality of their domestic higher education institutions through the encouragement of collaboration programs with quality providers in developed economies. Nevertheless, the growth of franchising and joint ventures has raised concerns about their overall impact on the development of higher education systems in low-income countries (Adnett, 2010, p.634).

For SEE to transform itself from a region primarily reliant on proximity-based enrolment, a vulnerability identified in Chapter 3, into a competitive player in the global market, its higher education institutions and respective national governments must implement a multifaceted internationalization strategy. The example of Romania reinforces the importance of a coherent national strategy. In that context, the absence of a unified direction manifested as a series of fragmented state initiatives, which frequently faced challenges during their implementation, ultimately impeding the country's global competitiveness in the sector (Nisipeanu-Biliga, 2025).

Success requires aligning academic offerings with the needs of the global market as discussed in Chapters 2 and 3. Universities must offer high-quality programs in the English language that are innovative and easily recognizable in different systems (e.g., utilizing the ECTS system). It is essential to define clear and realistic goals for internationalization and implement proactive, targeted strategies focused on specific origin countries where SEE value proposition (cost accessibility, culture, and safety) is most attractive.

Since higher education institutions in SEE cannot compete solely based on global rankings, a reality explored in our comparative data, a superior student experience and administrative efficiency become crucial competitive advantages. To overcome the specific administrative bottlenecks identified in the comparative analysis presented in Chapter 3, reducing bureaucracy and providing efficient support can be a decisive factor. Therefore, it is recommended that a Centralized 'One-Stop-Shop Service be established (e.g, an International Student Office) to handle all administrative matters for international students: visas, residence permits, health insurance, and document recognition. Furthermore, reflecting the student welfare concerns raised in Chapter 3, it is critical to ensure guaranteed and affordable accommodation, whether in dormitories or through verified partnerships, as well as logistical support upon arrival, such as airport transfers and comprehensive orientation programs. Mentorship programs, which connect new international students with experienced domestic students, can further ease navigation through culture and campus life.

In the digital age, a strong digital presence and transparency are essential to bridge the information gap noted in our market research. This involves maintaining a transparent, multilingual website with all key information, such as tuition fees, admission requirements, and deadlines, kept up-to-date in English and well-positioned in search engine results. Similarly, social media engagement using platforms popular in target regions is vital for showcasing authentic student life.

Finally, to mitigate the 'brain drain' trends discussed earlier in this work, industry connections and employment opportunities must be strengthened through career integration. Developing mandatory internship programs and strategic partnerships with local and international companies will help students improve post-graduation employment prospects and encourage them to remain in the region. This is a very important element, as seen when analyzing the highly successful internationalization program of South Korea, which effectively linked education to labor market needs (Huang et al., 2025).

The research concludes that SEE countries possess the fundamental elements, affordability, cultural richness, and academic commitment, for a significant increase in their participation in global academic mobility. Success hinges on transforming institutional and governmental approaches from the passive enrolment policies criticized in earlier sections to aggressive, student-centric internationalization strategies focused on quality, accessibility, and streamlined administrative support.

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КОМПАРАТИВНА АНАЛИЗА ГЛОБАЛНЕ МОБИЛНОСТИ СТУДЕНАТА НА ПРИМЈЕРУ КОНКУРЕНТСКИХ ИЗАЗОВА ЗА ЈУГОИСТОЧНУ ЕВРОПУ

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АПСТРАКТ

Међународна мобилност студената постала је један од кључних аспеката глобализације високог образовања, при чему земље чланице Организације за економску сарадњу и развој (OECD) заузимају доминантну улогу као водеће дестинације за стране студенте. Овај рад анализира тренутне трендове мобилности међународних студената у OECD земљама, идентификује државе које привлаче највећи број студената и испитује факторе који доприносе њиховој атрактивности, укључујући квалитет образовања, финансијске услове, имиграционе политике и тржиште рада. Посебан фокус ставља се на могућности земаља Југоисточне Европе да привуку већи број међународних студената у контексту растућих трошкова школовања у појединим развијеним земљама и промјена у глобалним образовним миграцијама. Користећи упоредно-аналитички приступ и методу анализе секундарних података, рад испитује предности и ограничења универзитета у региону Југоисточне Европе, као и стратегије које би могле побољшати њихову конкурентску позицију у односу на водеће OECD дестинације. Закључци истраживања указују на то да универзитети у Југоисточној Европи, уз адекватне реформске политике, прилагођавање академских програма и проактивне стратегије интернационализације, могу постати све значајнији учесници у глобалној академској мобилности.

Кључне ријечи:
међународни студенти, мобилност студената, OECD, Југоисточна Европа, интернационализација високог образовања, конкурентност универзитета