

Staf Analytics.

Study Destination: Stockholm

Report on International Student Mobility in 2017–18



Staf Analytics, February 2019

Brita Lundström, Ph.D

Stockholm Academic Forum

Valhallavägen 79

114 28 Stockholm, Sweden

www.staforum.se

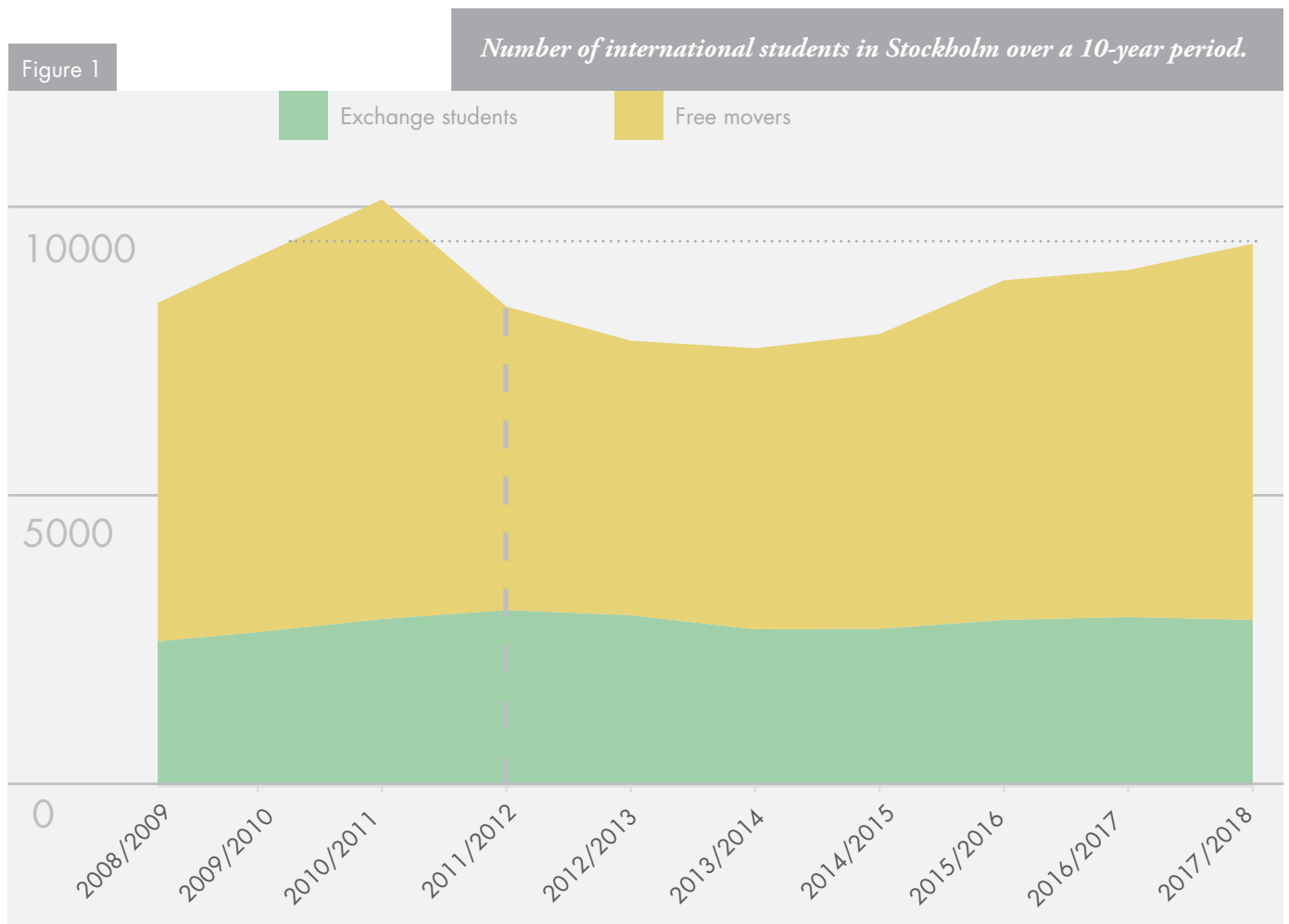
In the last three years, the number of international students in Stockholm has increased by 20%, which corresponds to 1,630 more inbound students. During the past academic year, this number increased by 5% compared to the previous year, which brings the total number to 9,750 inbound students. This means that the number of international students in Stockholm is approaching 10,000. For the first time since tuition fees were introduced, China is the country with the largest group of international students in Stockholm. The number of students from Germany, which had been the largest, or second largest, inbound group in Stockholm for many years, has also seen an increase but not at the same rate as China and is therefore in third place this year.

More international students

The proportion of international students in Stockholm is rising and now stands at 11 % of all registered students, compared to 10 % the previous year. The rise in the number of inbound students means that 26 % of all international students in Sweden are now in Stockholm. During the academic year 2017–18, 9,750 international students came to study in Stockholm, an increase of 5 % compared to the previous academic year. Of these international students, 6,767 were free movers while 2,983 were exchange students.

Tuition fees were introduced in Sweden in 2011 for students from a country outside the EU/EEA and Switzerland (see dashed line in Figure 1). Many inbound students rushed to take advantage of the last chance to study without fees the year before, creating a peak in numbers for 2010–11. Leaving this peak aside, the number of inbound students is now back at the same level as before the tuition fees were introduced (see dotted line in Figure 1).

9,750
+5 %
6,767 FREE MOVERS
2,983 EXCHANGE

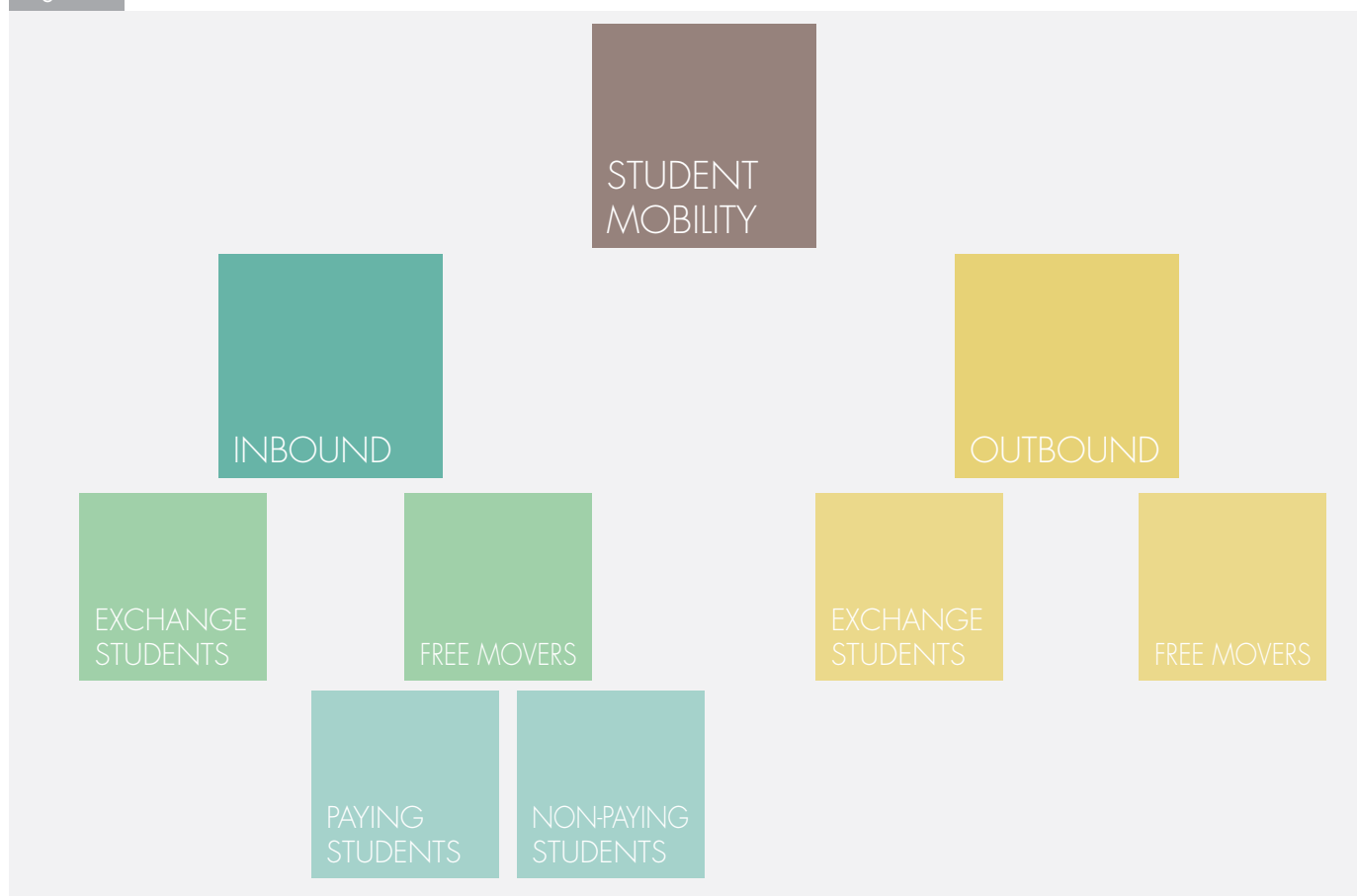


Student Mobility

International student mobility consists of inbound and outbound students. Both categories include exchange students and free-moving students. Exchange students are those who take part in an exchange program through their home institution, either for a short or a long period of time. Free movers are students who plan their studies entirely by themselves. Free-moving students pay tuition fees in Sweden if they come from a third country (i.e. a country outside the EU/EEA and Switzerland).

Student statistics can be presented in different ways, for example, the number of students can be calculated on the number of individuals or the number of full-time students. Similarly, student mobility can be reported based either on the total number of international students or on the number of international students entering the Swedish higher education system for the first time. This report presents the total number of individuals studying at Stockholm's HEIs.

Figure 2



China in Top

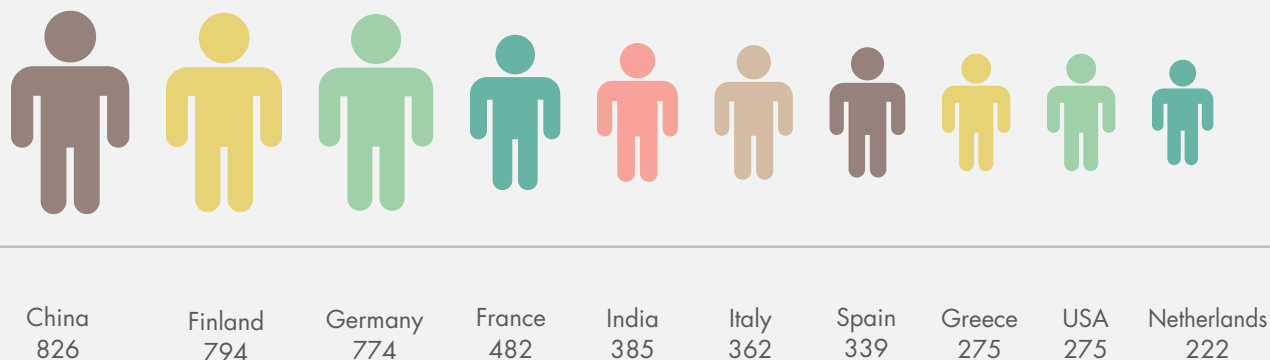
During the academic year 2017–18, the number of Chinese students skyrocketed. They are now the largest single international student population in Stockholm with 826 students, an increase of 18 % compared to the previous year. Finland retained its second place with 794 students. After increasing for several years, the number of Finnish students decreased during the academic year (-4 %), but still remains in second place. The number of students from Germany has increased slightly (+2 %), but not as much as that for China. With 774 students, Germany has been overtaken and slipped down to third place, a big change since German students had been the largest, or second largest, international student population in Stockholm for many years. France’s position remains unchanged, at number four, with 482 students. In fifth place, India boasted 385 students, which is

an increase of 16 % compared to the previous year. The next five countries are: Italy (362, +7 %), Spain (339, +14 %), Greece (275, +2 %), the USA (275, -1 %) and the Netherlands (222, -13 %).

There is a lot of variation among the different higher education institutions (HEIs) as to which student groups are the largest. At the Stockholm School of Economics, Germans make up the largest group of international students while Chinese are in the majority at KTH – Royal Institute of Technology. At Stockholm University and Karolinska Institutet, however, Finnish students represent the largest contingent of international students, making up much as 18 % of all inbound students at Karolinska Institutet.

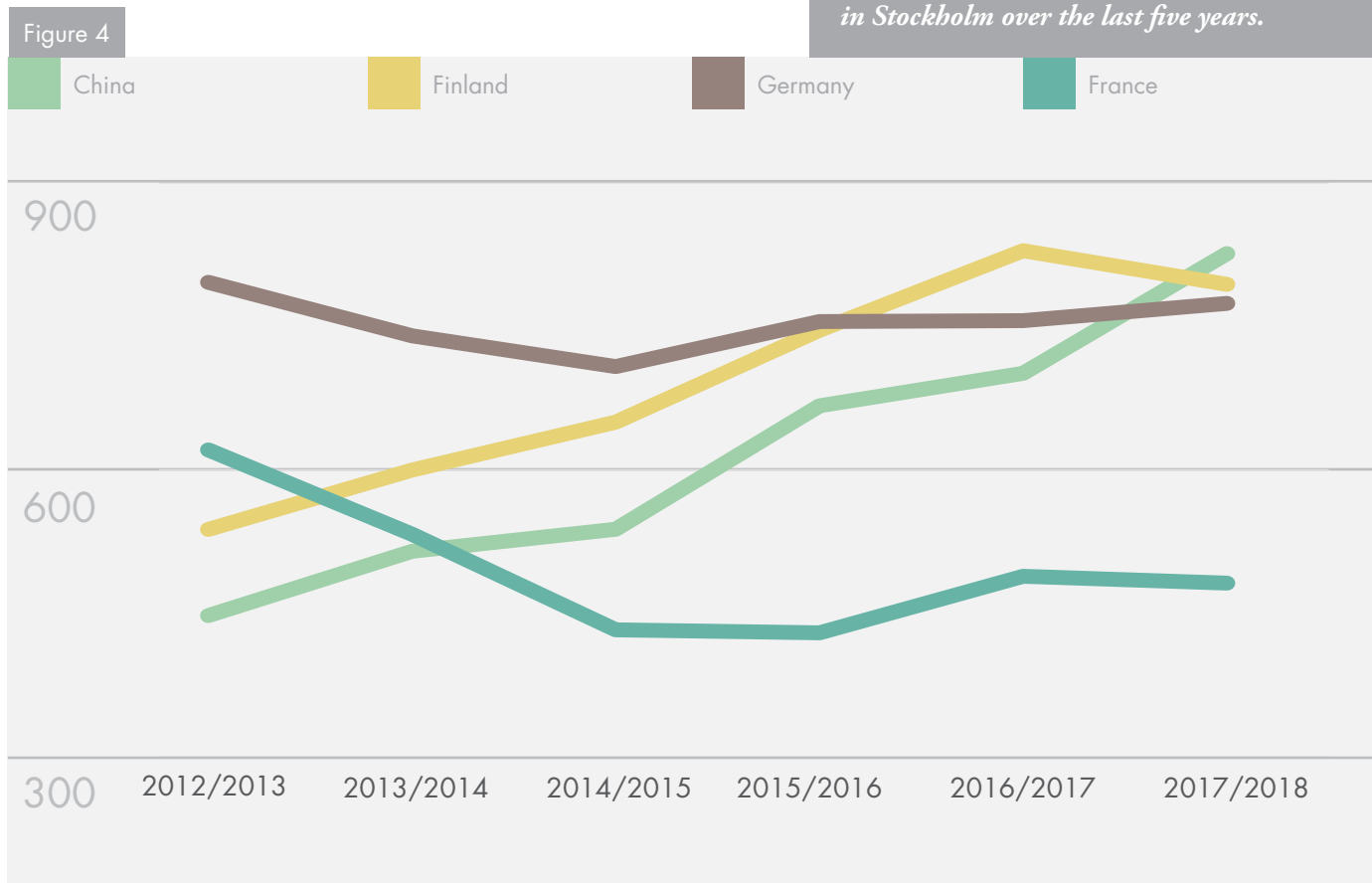
During the academic year 2017–18, Chinese students made up the largest group of international students in Stockholm’s HEIs. Below, China leading the top ten countries of origin.

Figure 3



+18%
 CHINESE
 STUDENTS

Evolution in the number of students for the four largest international student groups in Stockholm over the last five years.

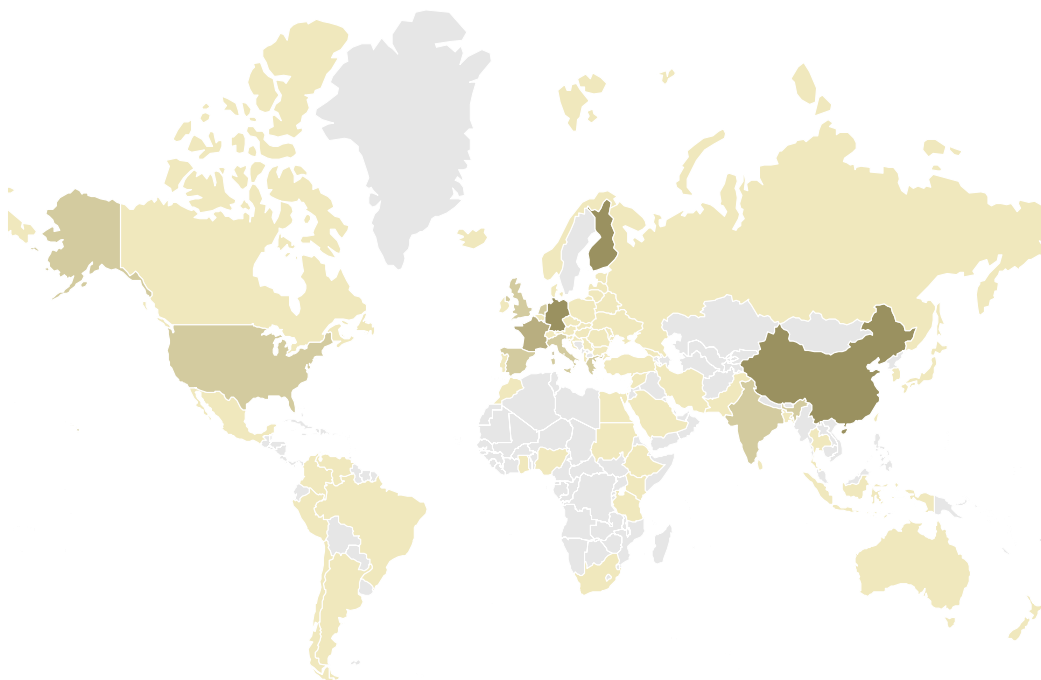


Free Movers Exceed Exchange Students

At 69 % of all inbound students, free-moving students make up the majority of inbound students. Free movers include both paying and non-paying students, with a lot of variation in this distribution among different HEIs. For example, 10 % of free-moving students at Stockholm University pay for tuition while this number reaches 42 % at KTH. Tuition fees at Stockholm University are SEK 180,000–280,000 for a Masters program (120 credits). At KTH, tuition for most Masters programs (120 credits) comes to SEK 310,000, while the Masters program in Architecture (120 credits) costs SEK 520,000.

Inbound students come from large parts of the world. 58 % come from EEA countries and 3 % from the rest of Europe. 27 % of students come from Asia, 5 % from North America, 3 % from Africa, 2 % from South America and 2 % from Oceania.

Figure 5



Chinese and Indian Students Study Tech

Almost 60 % of all Chinese students in Stockholm study at KTH. Chinese students are also mostly free movers (78 %). In the national statistics that look at all the HEIs in Sweden, 60 % of the Chinese students are women. Those statistics do not tell us what topic they study but we can get an idea by looking at admission statistics for international students who applied to Masters programs before fall term 2017. We cannot know, however, whether the students who were accepted into these programs ended up coming to Stockholm. The five most popular Masters programs for applicants from China were all at KTH: *Embedded Systems*, *Information and Network Engineering*, *Machine Learning*, *Communication Systems*, and *Architecture*.

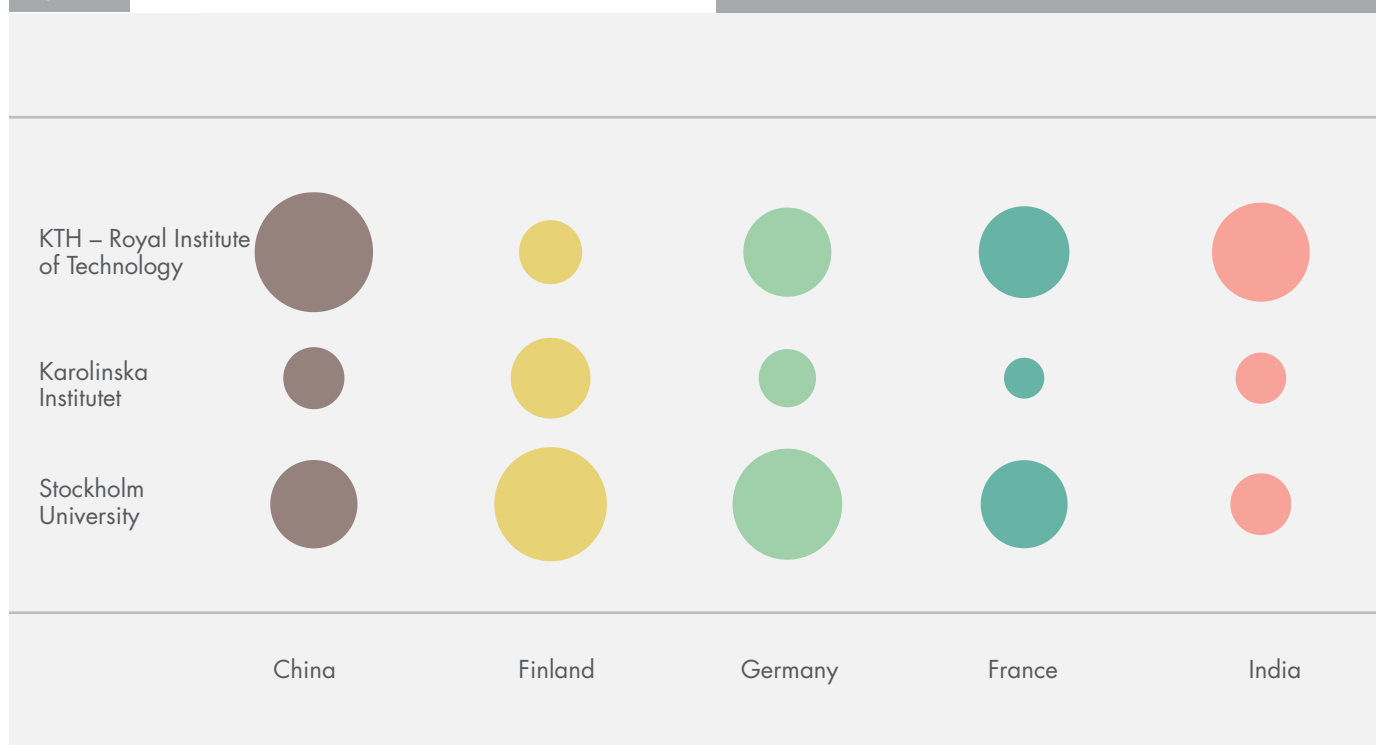
Finnish students in Stockholm are also predominantly free movers (90 %) and women (72 %). 50 % of them attended Stockholm University. Among German students in Stock-

holm, 50 % go to Stockholm University, and the distribution between free movers and exchange students is perfectly even. The same holds true for the distribution between genders. An equal gender distribution is to be found among French students as well. 47 % of French students attend KTH, 42 % Stockholm University, and 62 % are exchange students.

74 % of Indian students attend KTH and the majority (95 %) of all Indian students in Stockholm are free movers. National figures tell us that 24 % of international Indian students are women while admission statistics show that the Masters programs that accepted the most Indian students were *Production Engineering and Management*, *Engineering Design*, *Sustainable Energy Engineering*, and *Embedded Systems* at KTH and *Computer and Systems Sciences* at Stockholm University.

At KTH, the largest inbound student group is from China, followed by India. At Karolinska Institutet, the largest group comes from Finland, followed by China. At Stockholm University, the largest group is also from Finland, but followed by Germany.

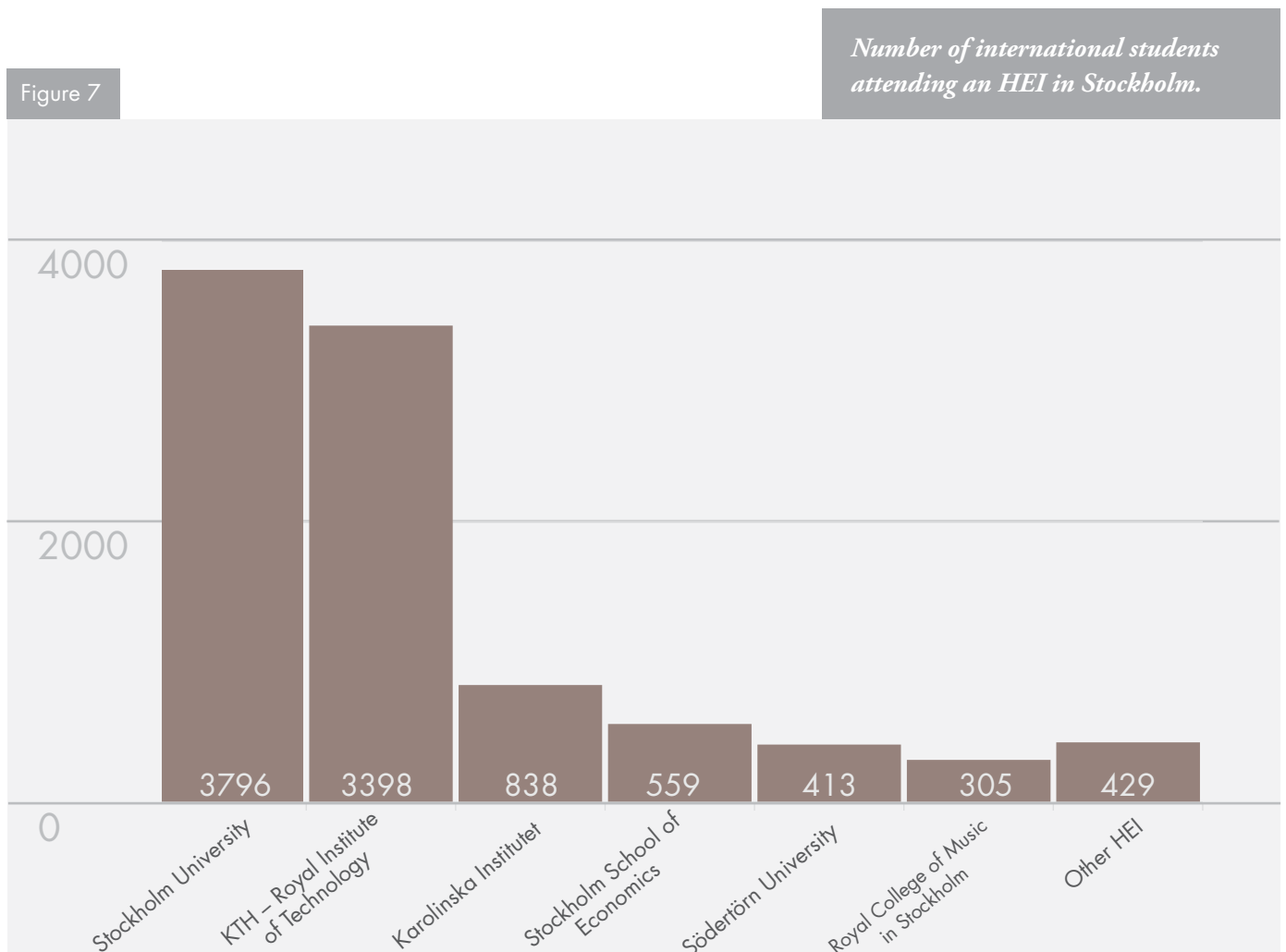
Figure 6

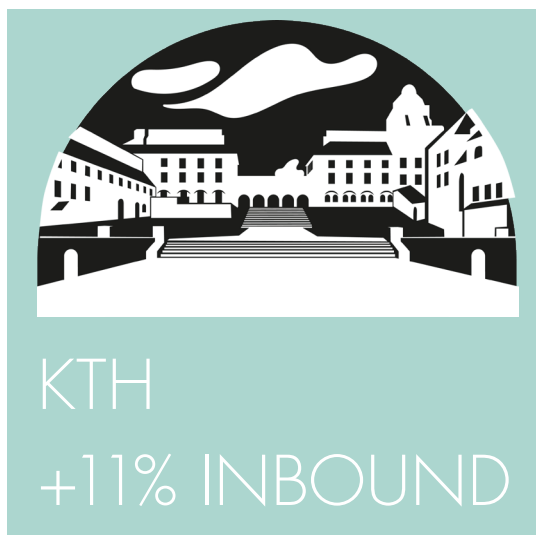


KTH Accounts for the Largest Increase

KTH experienced the largest increase in inbound students; the institution welcomed a total of 3,398 international students, an increase of 11 % compared to last academic year. Still, Stockholm University retained the largest number of international students overall, with 3,796. At KTH, inbound students now make up 21 % of the student body, an increase of 3 %. We see the same evolution at the Stockholm School of Economics, where the proportion of inbound students has increased by 3 % to reach 30 %, the highest

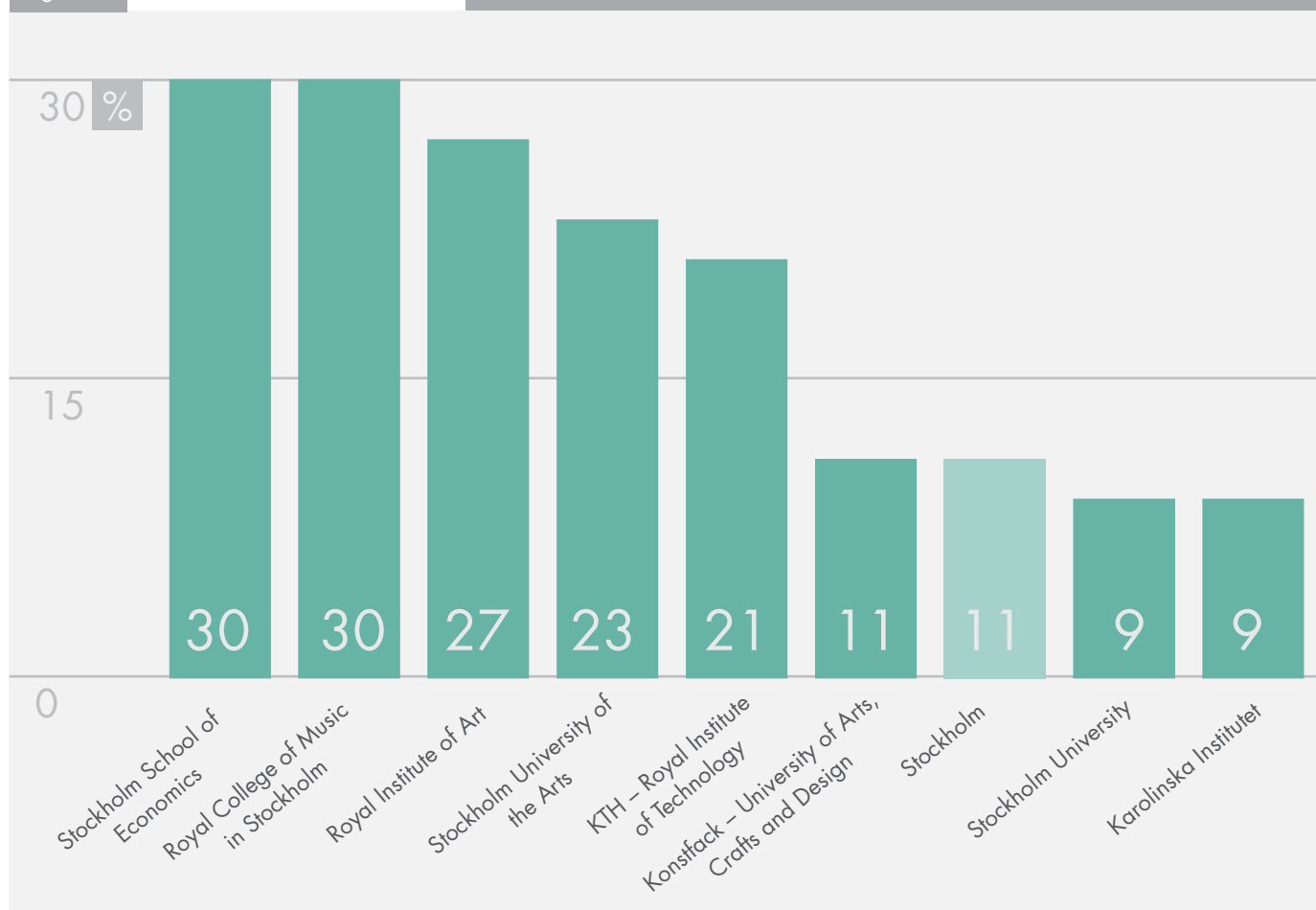
proportion among HEIs in Stockholm. Similarly, 30 % of students at the Royal College of Music in Stockholm came from abroad during the school year 2017–18. The proportion of international students enrolled at the Royal College of Music can vary dramatically, however, and has previously been linked to individual courses, which in some cases were offered remotely, so students technically registered as inbound students were in fact not present in Stockholm.





The Stockholm School of Economics has the highest proportion of international students, followed by three of the artistic university colleges in Stockholm. If we consider the city of Stockholm as a whole, international students make up 11 % of the student body.

Figure 8



Britain Loses Students

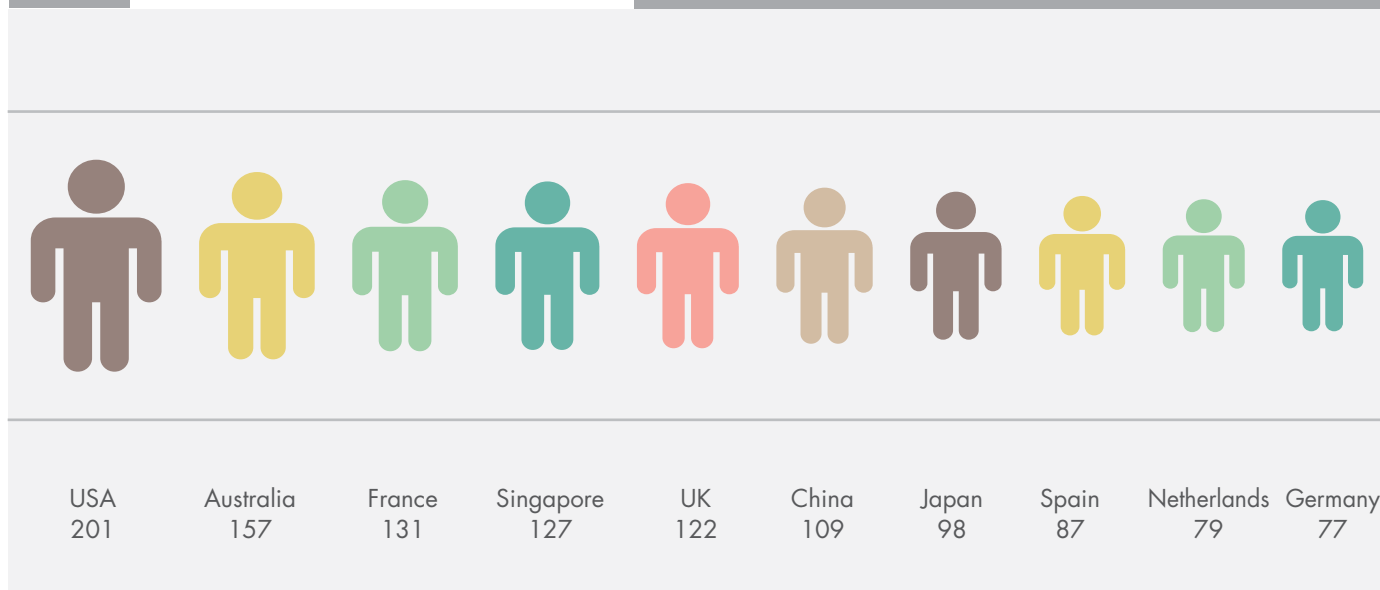
Among outbound exchange students, we see a dramatic shift: The appeal of Britain as a study destination is clearly declining, which can only be interpreted as a consequence of concerns over Brexit affecting student mobility. Britain had been the most popular destination for many years, after the United States. But, during the academic year 2017–18, Britain dropped to fifth place while Australia took its place as second most popular destination. The ranking is now: the United States (201, +21%), Australia (157, +20%), France (131, -1%), Singapore (127, -5%), and the UK (122, -16%). At 1,894, the number of outbound exchange students is unchanged compared to the previous academic year. This means that the imbalance between inbound

(2,983) and outbound (1,894) exchange students continues. As was the case before, most outbound exchange students come from Stockholm University and KTH.

During the academic year 2017–18, however, only about 2% of all students enrolled in one of Stockholm’s HEIs took advantage of the opportunity to go on an exchange. The same figure applies to the whole country. At KTH and Konstfack – University of Arts, Crafts and Design, 5% of the students made use of the opportunity to study abroad during the academic year. At the Stockholm School of Economics, however, 18% of the students took the opportunity to study abroad.

The overall number of outbound exchange students from HEIs in Stockholm is unchanged compared to the previous year. A dramatic difference, however, is that Britain has fallen from second to fifth place as a study destination.

Figure 9

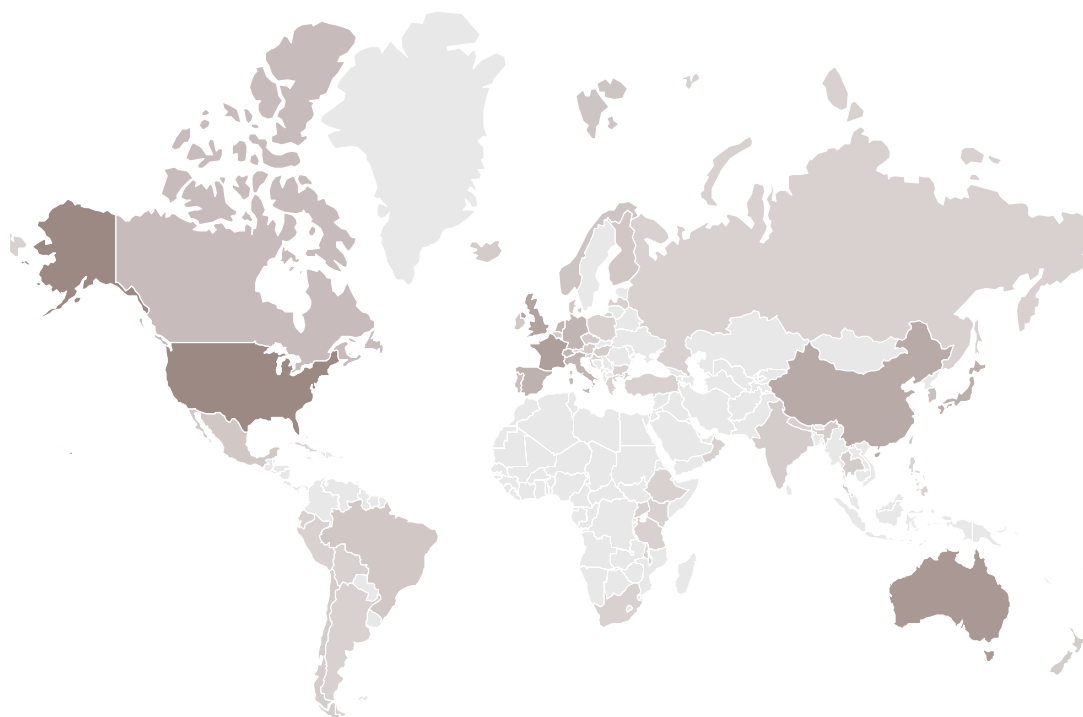




STOCKHOLM SCHOOL
OF ECONOMICS
18% OUTBOUND

During the academic year 2017–18, 1,894 students from HEIs in Stockholm traveled abroad, mainly to English-speaking destinations.

Figure 10



Fewer Outbound Free Movers

The number of outbound free movers, i.e. people from Stockholm County who have planned their own university studies abroad, has decreased (-4%) compared to the academic year 2016–17. This figure is based on how many people have taken out student loans to study abroad from the Centrala Studiestödsnämnden (The Swedish Board of Student Finance). According to these statistics, during the academic year 2017–18, 4,766 people were registered in Stockholm County as studying abroad.

The decline in popularity of Britain as a study destination is not as clear among free movers as it was among exchange students. The United States also saw a decline in the number of outbound free movers: while UK numbers declined by -3%, US numbers went down by as much as -15%. It is the second consecutive year that these two countries have seen a drop in numbers, which corresponds to -26% for the US and -17% for the UK over the past two years.

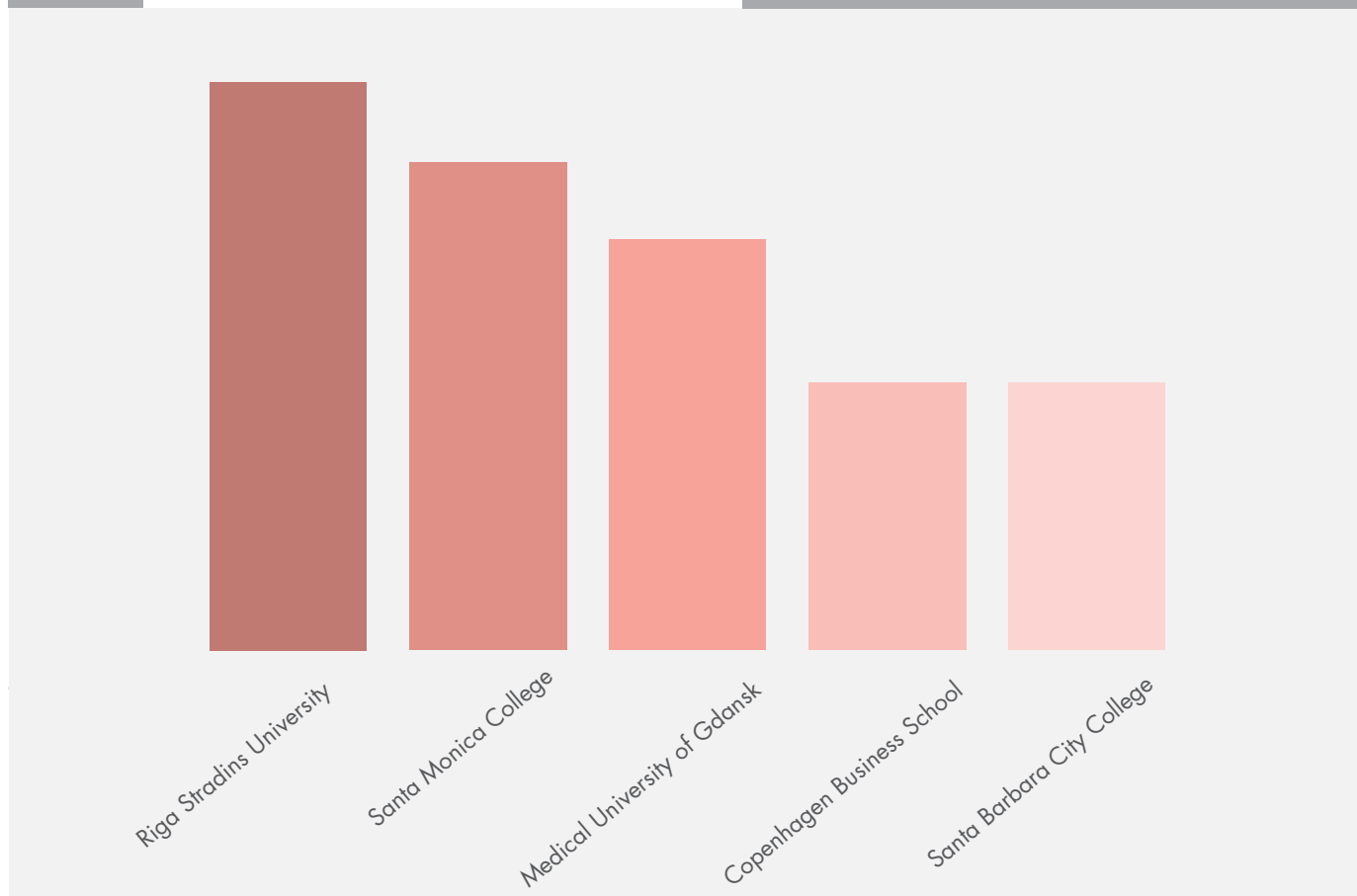
Despite the downturn, the United States (with 1,182 stu-

dents) and the United Kingdom (1,164 students) are by far the top destinations among free-moving students from Stockholm County. Then comes Poland (382), Australia (280), Latvia (156), the Netherlands (135), Spain (134), Denmark (133), Germany (128) and France (83).

Medicine remains without competition the most popular subject to study abroad, which also explains why Poland and Latvia rank so high among study destinations. The number of people from Stockholm County who study medicine abroad has even increased, to 698, during the academic year. They attended, among other universities, the Riga Stradins University in Latvia (155 people), the Medical University of Gdansk (112 people) and Wroclaw Medical University (64 people), both in Poland. After medical schools, the most attractive programs for free movers from Stockholm County are various Economics programs, with the Copenhagen Business School in Denmark being the most popular foreign university in that field.

Figure 11

Five foreign universities with the most free movers from Stockholm County.



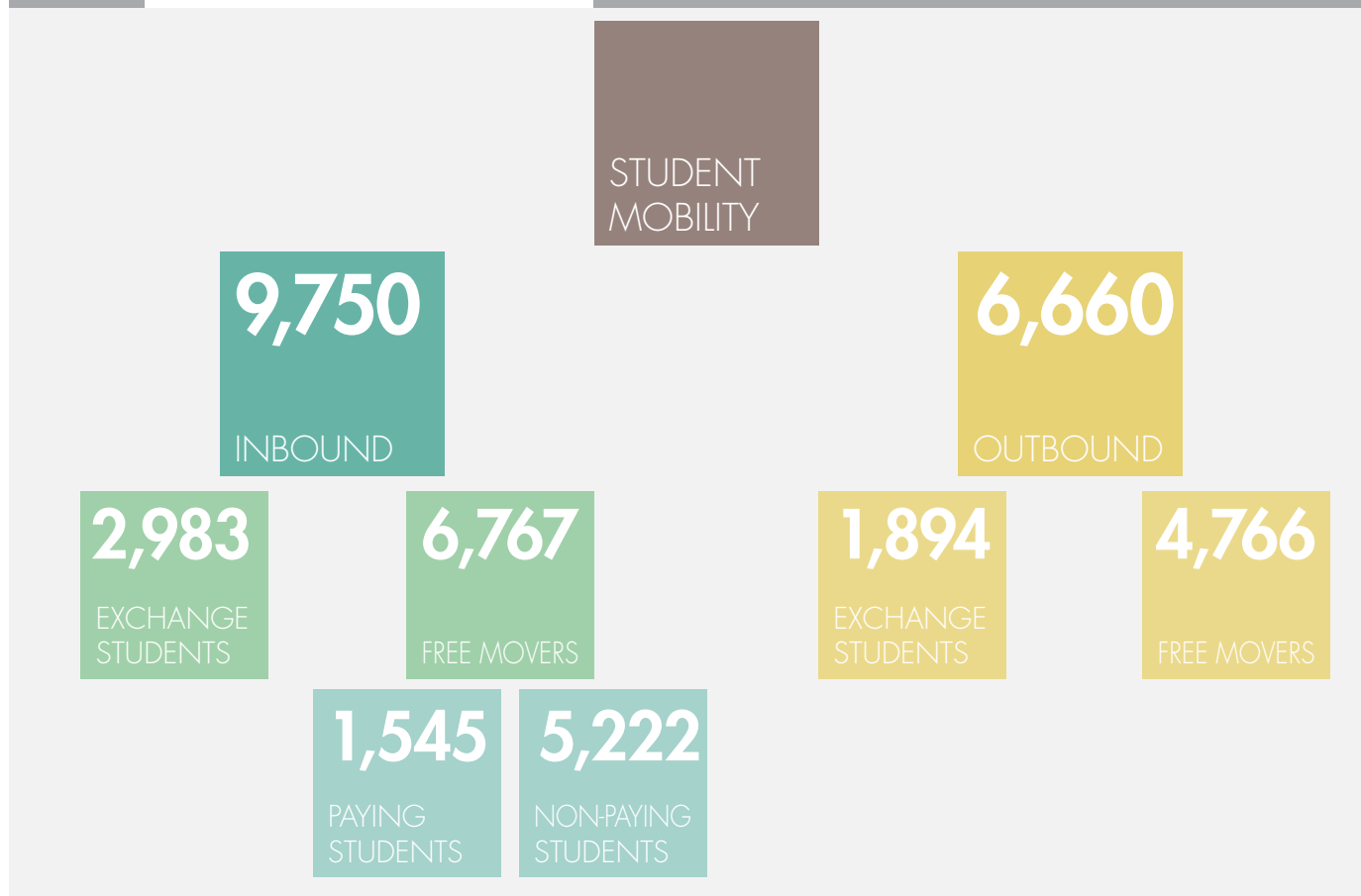
Conclusion

Finally, we see that interest in Stockholm as a study destination is increasing and that the number of inbound students approaches 10,000. Underlying this increase is strategic work including cooperation with prestigious universities worldwide, and marketing. The number of exchange students remains largely unchanged, both inbound and outbound, while the quality of exchange programs has gone up. HEIs in Stockholm have reviewed their exchange agreements, retaining only those with a quality and infrastructure that worked for them and their students. The work of recruiting free moving students has also become more strategic, as individual institutions focus on prioritized mar-

kets. Moreover, several HEIs offer joint programs, called dual degrees, with foreign universities: To receive a double degree, students spend one year in Stockholm and one year at the foreign university. A popular example is the Masters program in Embedded Systems at KTH, which is a collaboration with the University of Electronic Science and Technology of China (UESTC) in China and with Khalifa University in the United Arab Emirates. The Stockholm School of Economics offers double degree-programs with Bocconi University in Milano, Italy, University of St. Gallen in Switzerland and Sciences Po in Paris, France.

Figure 12

The number of inbound students to Stockholm exceeds that of outbound ones. Among inbound students, 69 % are free movers, of whom 23 % pay tuition. Among outbound students, 28 % go on exchange programs through their university and 72 % planned their studies themselves.



Further Analysis:

Global Flows

How then does international student mobility in Stockholm and Sweden compare to student flows at a global level? Are there any international patterns? Global student mobility is governed by historical, cultural, and political logic. Mikael Börjesson, a Sociologist of Education at Uppsala University, has structured international flows around three geographical poles. The first is the Pacific pole, dominated by Anglo-Saxon countries, such as the USA, Australia, and the United Kingdom. Despite high tuition fees, this is the destination of the largest flows of Asian students. The second pole is the European pole, based on a principle of proximity and the political idea of European affinity. European students primarily choose other European countries as a study destination. In addition, the European pole shows how different language clusters affect the flows: Sweden–Finland and Sweden–Denmark–Norway see a high mobility rate. The same holds true between Germany, Austria, and Switzerland as well as between the Netherlands and Belgium. The third pole is characterized by old colonial bands and is called the French/Iberian pole. Student flows from Africa and Latin America largely go to France, Spain, and to some extent Portugal. Of course, in many of the former French colonies, not only is the language an important common denominator, but school systems are also often constructed according to the French model.

In Börjesson's model, Sweden sits just at the intersection of the Pacific pole and the European pole, which means that Sweden attracts both Asian and European students, but to a lesser extent African and Latin American students. (Börjesson, Mikael, 2017: "The Global Space of International Students" in the *Journal of Ethnicity and Migration Studies*, vol. 43, issue 8, 1256-1275.) The model is based on the student flows in 2010 but, even though it is a few years old, it is still valid. Of course, there is much that can change the flows, but many other factors are also strongly consolidated as geographical, cultural and historical ties.

The model turns out to be valid when we look at Sweden's popularity among international students compared to other countries. It can be stated that, although it only receives a fraction of all students from China and India, Sweden is still among the most popular destinations within the EU/EEA for these students. For Chinese students, only the UK, France, and Italy are ahead of Sweden among EU countries. The same ranking applies to students from India. These figures are based on the latest statistics from UNESCO, *Global Flow of Tertiary-Level Students*, and are figures from 2016 and 2017. However, the statistics do not include Germany and the Netherlands, which is a weakness since these two

countries have many similarities with Sweden and are in many ways our biggest competitors.

The report *International Student Mobility in 2027: Local Investment, Global Outcomes* from the British Council (January 2018) predicts the ten largest emerging markets for outbound students by 2027. These are China, India, Pakistan, Nigeria, Bangladesh, Saudi Arabia, France, Nepal, Indonesia, and Kenya. Stockholm and Sweden are already well-established study destinations in China and India and the number of inbound students from these countries is increasing steadily. That Sweden still receives just a few thousand of all outbound students from China (2.8 %) and India (5.5%) only emphasizes the huge potential for growth. The number of inbound students from Pakistan to Stockholm has somewhat dropped while that of students from Bangladesh has slightly increased during the academic year. Bangladesh is also one of the countries that Sweden has selected for long-term development cooperation, including scholarship programs. Outbound students from Pakistan primarily choose major English-speaking study destinations, such as the US, the UK, and Australia, followed by countries in Southeast Asia and the Middle East, but among EU countries, Sweden is their third choice. Among outbound students from Bangladesh, Sweden ranks right after the UK among EU countries. In Nigeria and Kenya, on the other hand, Sweden is far down the list of study destinations, behind Finland, Norway, and even Denmark. The same pattern applies to outbound students from Nepal: Sweden is their last choice among the Nordic countries.

Therefore, we can say that Sweden does quite well in the international ranking, although there is great potential for improvement in attracting more students from, for example, the United States and the UK, since Sweden receives fewer students from these countries than Denmark does.

Sources: *International Student Mobility*, statistical database, Swedish Higher Education Authority (Universitetskanslersämbetet, UKÄ). Statistics from the Swedish Board of Student Finance (Centrala Studiestödsnämnden, CSN). UNESCO statistics (online), *Global Flow of Tertiary-Level Students*. Report on *International Student Mobility to 2027: Local Investment, Global Outcomes*, British Council (January 2018). Börjesson, Mikael, 2017: "The Global Space of International Students" in the *Journal of Ethnicity and Migration Studies*, vol. 43, issue 8, 1256-1275.) Staf Analytics' own *International student mobility in Stockholm* reports from previous years.

Staf.

Stockholm Academic Forum