



NITI WORKING PAPER SERIES

Working Paper No. O-15012/29/25-R&N

International Student Mobility: A Global and Indian Temporal Overview

Discussion Paper | November 2025



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I. Introduction

Internationalisation of higher education has emerged as a defining paradigm in the global knowledge economy. It is best understood as a transformative framework to enhance the quality and relevance of teaching, research, innovation, and societal engagement in higher education institutions (HEIs). The International Association of Universities adopts the following definition of internationalisation of higher education, “[It is] 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.” (De Wit, H., Hunter F., Howard L., Egron-Polak E. (Eds.) (2015) “Internationalisation of Higher Education”, European Parliament, Brussels: EU).

In the ancient world, India pioneered the internationalisation of higher education, where global engagement was a fundamental principle embedded in its academic ethos. World-class institutions of ancient India such as Takshashila, Nalanda, Vikramshila and Vallabhi set the highest standards of multidisciplinary teaching and research and hosted students from across the globe. This rich ecosystem of learning produced great scholars who made seminal contributions to world knowledge in diverse fields. Hence, this the current time is an opportune moment for modern India to reclaim its position as a leading international hub of knowledge and talent, given its favourable demography, scale, multidisciplinary expertise and enabling policy frameworks.

Domestically, the policy framework is already conducive. The vision of Viksit Bharat@2047 articulates India’s aspiration to emerge as a global talent hub and a leader in education, research, innovation and entrepreneurship. India’s higher education system, the second largest in the world, is undergoing a seismic shift guided by the National Education Policy (NEP) 2020, which strongly emphasises ‘internationalisation at home’. NEP envisions a globally integrated higher education system, focusing on student and faculty mobility, research collaborations, and quality enhancement to create world-class multidisciplinary teaching and research institutions, while making India a preferred global study destination.

UGC (Guidelines on the Internationalisation of Higher Education) 2021, UGC (Academic Collaboration between Indian and Foreign Higher Educational Institutions) 2022 and UGC (Recognition and Grant of Equivalence to Qualifications obtained from Foreign Educational Institutions) Regulations 2025 are significant milestones in this direction. The International Financial Services Centres Authority (IFSCA) in GIFT City (Gandhinagar) introduced the Setting up and operation of International Branch Campuses and Offshore Education Centres Regulations, 2022, which paved the way for the first International Branch Campuses in India. As of May 2025, 11 Foreign Universities have formally established their presence in India with 4 in GIFT IFSC and 7 in different parts of the country.

I.1 Fiscal, Trade and Investment Impact

The significance of internationalising Indian higher education lies in its potential to address critical national priorities and deliver numerous benefits. It enables the development of world ready, globally competent talent, by ensuring that domestic students have access to globally relevant education and research. On the economic front, it has the potential to expand employment opportunities across the skill spectrum, stimulate domestic demand and investments, and drive economic growth. Furthermore, it can mitigate the growing foreign exchange burden caused by the large number of Indian students seeking higher education abroad.

Reserve Bank of India (RBI) data reveals a significant upward trend in India’s overseas education expenditure under the Liberalised Remittance Scheme (LRS) over the past decade. In just one decade,

annual outward remittances under the ‘studies abroad’ component have increased by over 2,000% from USD 0.16 billion (INR 975 crore)¹ in 2013-14 to nearly USD 3.4 billion (INR 29,000 crore) in 2023-24. This represents approximately 53% of the Union higher education budget, which stood at INR 55,000 crore in 2023–24. While the former focuses on about 3% of Indian students who study abroad, the latter serves large parts of the remaining 97% who study in India. It is also important to note that RBI records data on outward remittances does not account for the total expenditure incurred by Indian students on higher education abroad, which includes tuition fees, housing fees and living expenses amongst others.

Other institutional reports provide insights into the totality of expenses incurred by Indian students overseas. According to ASSOCHAM, about 4.5 lakh Indian students spent over USD 13 billion (INR 96,500 crore) per annum on higher education abroad as of 2020. The Indian Student Mobility Report stated that Indian students collectively spent an estimated USD 37 billion (INR 2.6 lakh crore) on overseas education in 2019 and this rose to approximately USD 47 billion (INR 3.8 lakh crore) in 2022. The report projected that if the sector continues to expand at its current annual growth rate of 14%, the expenditure on foreign education by Indian students would reach approximately USD 70 billion (INR 6.2 lakh crore) by 2025. This is about 10x of the Government of India’s higher education budget for 2025-26 and approximately 2% of India’s GDP.

It is important to also present this in the context of India’s international trade situation. India’s overall trade deficit (including services and merchandise trade) stood at nearly USD 94 billion in FY 2024-25. Expenditure on foreign education by Indian students in 2025 is, therefore, nearly 75% of India’s overall trade deficit in FY 2024-25. This trend also underscores the increasing forex burden on the Indian economy due to student demand for overseas education, thereby reinforcing the imperative to strengthen internationalisation efforts within the domestic higher education system. In addition to the obvious advantage of retaining talent, students opting to study in India, curtail forex outflow, retaining funds within the economy and contributing to national growth.

The Indian higher education sector is also a promising field for Foreign Direct Investment (FDI). As per the consolidated FDI Policy 2017, 100% FDI is permitted under the automatic route for educational institutions. 100% FDI is permitted in the Indian education sector under the automatic route. As per Invest India, between April 2000 to December 2024, India received USD 9.9 billion FDI in education.

Moreover, higher education has been positioned as a tradeable commodity under the GATS framework, with universities becoming providers, educators becoming investors, and students becoming clients in a market-mediated system. The global landscape of internationalisation manifests through four primary modes: cross-border supply of services (including MOOCs and e-learning), consumption abroad through student mobility, commercial presence via branch campuses, and mobility of academic personnel.

2. Literature Review

The literature on internationalisation of higher education is relatively recent compared to other strands of higher education research. The concept of internationalisation of higher education has been informed by Jane Knight’s seminal definition, first articulated in the 1990s, which described internationalisation as “the process of integrating an international or intercultural dimension into the teaching, research, and service functions of the institution”. Recent research has raised concerns

¹ Average annual exchange rate for INR against USD (INR/USD) based on Forbes India data for the years mentioned above: 2014: 60.95, 2019: 72.15, 2020: 74.31, 2022: 81.62, 2024: 85.56, 2025: 88.73

about its narrow scope and implicit biases. Critics have noted that the standard definition of internationalisation often reflects Western-centric norms and overlooks power imbalances in global education (Brandenburg & de Wit 2011). In particular, scholars like Stein (2021) argued that Knight's definition effectively reinforces a 'Western-centric paradigm' and fails to capture the diversity and complexity of higher education systems around the world. Marginson (2023) called for a decolonised approach: one that abandons the old one-size-fits-all schema and instead reframes internationalisation through plural, context-sensitive perspectives.

Early conceptualisations (de Wit, 2002; Knight, 2004) described internationalisation primarily through the lens of student and faculty mobility, which constrained the understanding of internationalisation of higher education to quantitative flows across borders. Leask (2015) criticised this narrow scope and later proposed a process-oriented model of Internationalisation of the Curriculum (IoC) (2015), emphasising integration of global dimensions into programme design and learning outcomes. Altbach, Reisberg, and Rumbley (2010) noted that mobility and research collaboration were integral to the global academic revolution. Beelen and Jones (2015) introduced the influential concept of Internationalisation at Home (IaH), highlighting that international learning opportunities should reach the 'non-mobile majority' of students. Building on this shift, de Wit et al. (2015) reframed internationalisation as the intentional integration of international and intercultural perspectives into higher education's purpose, function, and delivery, thereby linking it with quality assurance and societal contribution.

The literature on internationalisation of higher education has been extensive in the Western context but has remained relatively scanty in India. The study of international student mobility has historically been dominated by Global North contexts, with USA and UK serving as the principal destinations for decades (Glass & Cruz, 2023; Pawar, 2022). While literature highlights the South-North flow of students, recent decades have also seen the emergence of regional and South-South flows, with Asian nations such as China and South Korea transitioning into major host countries (Chan, 2012; Gbollie & Gong, 2020).

Within this evolving global structure, India's position has been asymmetrical. It is one of the largest source countries of internationally mobile students, but inbound numbers have remained modest, situating India as a 'semi-peripheral' host in the international student mobility hierarchy (Yang, 2022). Early policy analyses identified that India's internationalisation rationale differs from Western economies, being driven less by service-export revenues and more by soft power, visibility, and global reputation (Khare, 2014; 2021). Dahlman and Utz (2005) linked India's role in international education to the broader knowledge economy framework, underscoring knowledge as a key determinant of productivity and growth. Agarwal (2009) highlighted both the opportunities and weaknesses of Indian higher education, underlining the need for a clear national vision. Yeravdekar and Tiwari (2014) noted that India has historically attracted students from Asia and Africa, thereby contributing to regional capacity building through the development of human capital. They stressed that private HEIs in India have propelled internationalisation, particularly in professional fields such as engineering and management.

Scholars have further identified structural constraints: uneven quality across institutions, visa and administrative hurdles, limited part-time work opportunities, and weak branding relative to competitor hubs (Choudaha, 2017; Pawar, 2023). Consequently, India has not fully leveraged the global mobility wave. The literature has increasingly advocated diversification strategies, such as targeting East African markets, supported by frameworks combining GDP growth, demographics, and current outbound flows (Pawar, 2024).

In sum, the literature has placed internationalisation as both an opportunity and a challenge for India. While India has articulated ambitious policy frameworks for global positioning, the literature underscores a persistent gap between aspirations and outcomes. It highlights the dual challenge of reducing dependence on a narrow set of neighbours while simultaneously enhancing institutional readiness and student experience to strengthen India's claim as an emerging global education hub.

This discussion paper is a part of a larger report by the Education Division of NITI Aayog on 'Internationalisation of Higher Education in India', which takes a holistic and comprehensive lens to internationalisation of higher education and research in India and focuses on patterns, global approaches, and action strategies to transform India into a leading global destination for higher education. It in particular adds to the discourse on internationalisation of higher education in India by capturing the evolving dynamics of inward and outward student mobility, both in India and globally, and exploring the potential of internationalisation at home within the Indian higher education system. The genesis of this paper is that detailed temporal analysis of student mobility, especially in the context of India, is limited. It traces the shifts in inbound and outbound student flows, analyses regional and disciplinary patterns, and offers comparative insights over the last two decades. It contributes to the internationalisation literature by highlighting the dual pillars of internationalisation: 'internationalisation at home', which seeks to foster global competencies among all students within domestic HEIs, and 'internationalisation abroad', characterised by the physical mobility of students across borders. The paper concludes by offering policy recommendations to ensure India-centric internationalisation efforts.

3. Objectives of the Study

This paper seeks to provide an evidence-based understanding of international student mobility trends by drawing on temporal overview. The objectives of the study are:

- a. To analyse global trends in international student mobility, including key host and source countries over the past two decades.
- b. To examine India's position in the global higher education landscape as a source and host country of international students.
- c. To assess patterns of inbound international student mobility to India by source country, state, level of study and academic discipline.
- d. To evaluate outbound mobility trends of Indian students, including destination countries, state-level distribution, and preferred fields of study.
- e. To measure the inbound-to-outbound international student mobility ratio for India over time and provide recommendations for improving this ratio towards a more balanced mobility profile.

4. Methodology and Data Sources

This paper is a part of a larger Policy Report on 'Internationalisation of Higher Education in India'. It adopts a data-driven and descriptive approach based on secondary data to examine international student mobility patterns. Temporal data from the years 2000 to 2024 has been collated from reputed sources to track changes in student mobility, host-source dynamics, enrolment percentages and disciplinary preferences. Comparative metrics such as growth rates, percentage share of international students, inbound-outbound ratios and net flow of students have been used to interpret trends. The following data sources have been used:

Source	Years	Publisher/Agency	Key Focus/Content
All India Survey on Higher Education (AISHE)	2012-13 to 2021-22	Department of Higher Education, Ministry of Education, GoI	Annual report on India's higher education: student enrolment (by level, discipline, demographics), institutional data, international student enrolments.
Statistics of Technical and Higher Education	2008-09	Ministry of Education, GoI	Official statistics on enrolments, institutional capacity, and academic programmes in technical and higher education; supports state-wise and discipline-wise trend analysis.
Student Mobility Data	2016-2024	Ministry of External Affairs (MEA), GoI	Annual figures on Indian students studying abroad, disaggregated by destination country; captures outbound mobility patterns.
UGC Annual Report	2000-01, 2004-05	University Grants Commission (UGC)	Insights into mobility trends, policy initiatives, regulatory developments, and performance indicators of HEIs; governance and internationalisation focus.
UNESCO Institute for Statistics (UIS)	2001-2022	UNESCO	Internationally comparable data on education, including global student mobility; benchmarks India's trends against global averages and leading countries.
Migration Data Portal	2001-2022	International Organization for Migration (IOM)	Global data on migration, including student mobility patterns; provides comparative indicators and country-specific insights.
Project Atlas	2014-2024	Institute of International Education (IIE)	Tracks international student mobility globally; details inbound and outbound flows, useful for cross-country comparisons of India with major host/source countries.

5. International Student Mobility: Global Overview

International student mobility has become a pivotal feature of global higher education in the 21st century. As per the 2019 UNESCO Global Convention on the Recognition of Qualifications concerning Higher Education, mobility refers to the “physical or virtual movement of individuals outside their country for the purpose of studying, researching and teaching”. This movement of students and scholars across borders not only reflects the aspirations of individuals seeking quality education and career prospects but also embodies the growing interdependence among educational systems worldwide.

Over the past two decades, the global landscape of higher education has witnessed a remarkable surge in international student mobility, reflecting the rising demand for globally competitive education.

Table I depicts that there has been 3x increase in the number of internationally mobile students worldwide, from 22 lakh in 2001 to 69 lakhs in 2022. This upward trajectory underscores the increasing importance of cross-border education in shaping transnational education and fostering international collaboration.

Table I: International Student Mobility (2001-2022)

Year	No. of Students (in lakhs)	Year	No. of Students (in lakhs)
2001	22	2012	41
2002	25	2013	43
2003	26	2014	45
2004	27	2015	48
2005	28	2016	51
2006	29	2017	54
2007	31	2018	57
2008	33	2019	61
2009	35	2020	66
2010	38	2021	64
2011	40	2022	69

Source: Migration Data Portal, International Organisation on Migration (IOM)

Note: The data reflects stock figures over the specified time period.

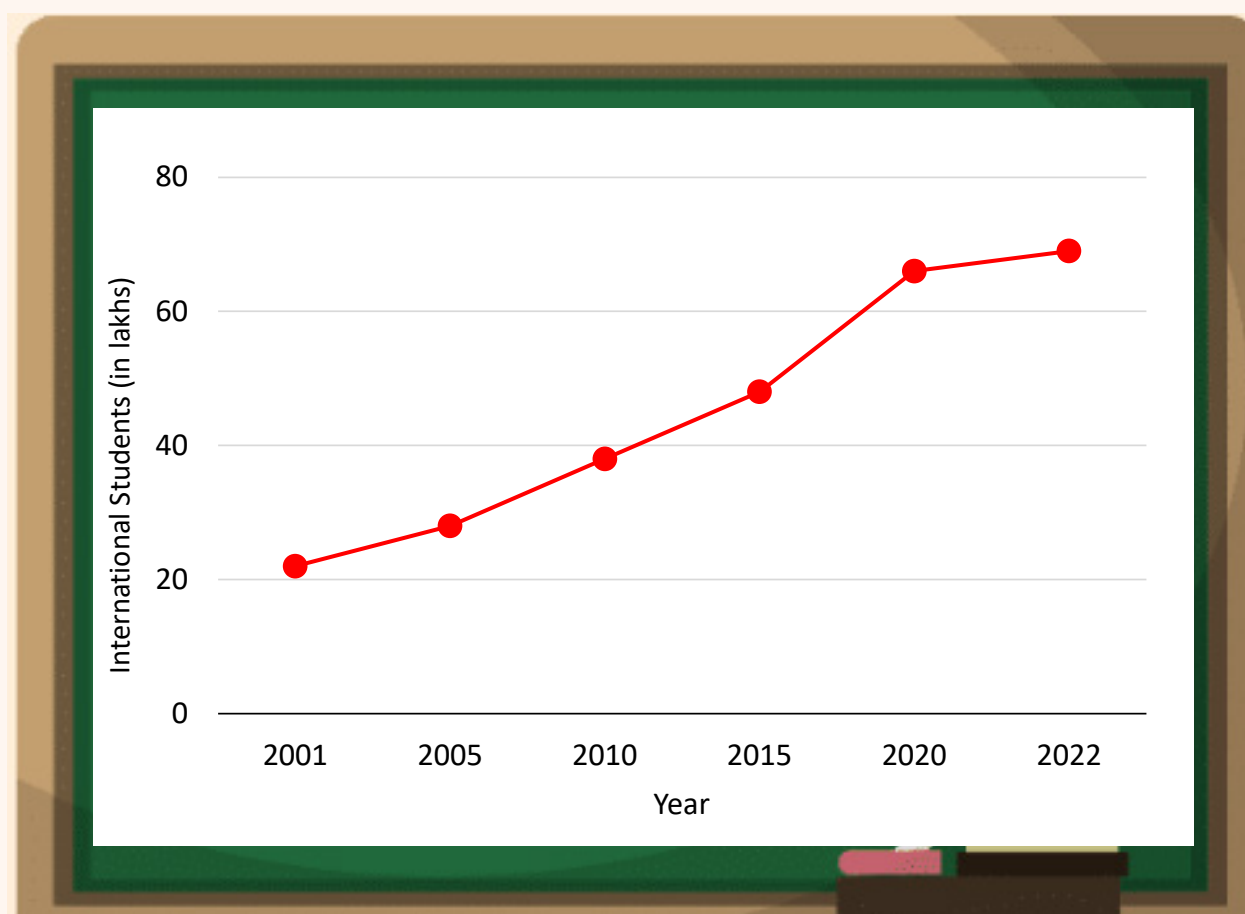


Figure I: International Student Mobility (2001-2022)

Figure 1 depicts the number of international students globally between 2001 and 2022, reflecting a 214% rise over 22 years. Between 2001 and 2010, the number rose from 22 to 38 lakhs, an increase of approximately 73%, driven by the early 2000s wave of globalisation and the expansion of higher education systems. From 2010 to 2015, growth continued steadily, reaching 48 lakhs in 2015, a 26% increase over five years aligned with the internationalisation strategies at the government and institutional levels. The period from 2015 to 2020 saw further growth, with numbers rising from 48 to 66 lakhs, a 37.5% increase over five years, reflecting continued global demand.

During the COVID-19 pandemic (2020–2021), the growth rate slowed from 66 to 64 lakhs, indicating a minor decline due to travel restrictions, health concerns and campus closures. However, 2022 marked a strong recovery with student numbers rising to 69 lakhs, a 7.8% increase from the previous year. This is one of the sharpest annual increases of the entire period and can be attributed to pent-up demand, resumption of cross-border mobility and universities adopting hybrid and flexible models.

5.1 Top 10 Host Countries for International Students: A Two-Decade Analysis

International student mobility has undergone significant transformation with shifts in the global higher education landscape influencing where students choose to study. Host countries play a crucial role in this dynamic shaped by factors such as quality of education, immigration policies, cultural openness, affordability and employment opportunities. Traditional education destinations have faced growing competition from emerging players that have strategically positioned themselves as attractive alternatives. As students increasingly weigh long-term prospects alongside academic and research quality, the global map of top host countries continues to evolve, reflecting broader political, economic and social trends.

Table 2: Top 10 Host Countries for International Students (2004-2024)

Year	2004		2014		2024	
Rank	Country	No. of Students	Country	No. of Students	Country	No. of Students
1	USA	5,72,509	USA	9,74,926	USA	11,26,690
2	UK	3,00,050	UK	4,93,570	Canada	8,42,760
3	Germany	2,46,136	China	3,77,054	UK	7,58,855
4	France	2,45,298	Germany	3,01,350	Australia	4,37,485
5	Australia	1,51,798	France	2,98,902	France	4,12,100
6	Japan	1,17,302	Australia	2,69,752	Germany	3,67,578
7	China	1,10,844	Canada	2,68,659	Russia	3,21,845
8	Russia	75,786	Japan	1,39,185	South Korea	2,08,962
9	Canada	66,576	Netherlands	90,389	China	2,00,892
10	South Africa	49,979	New Zealand	46,659	Spain	1,49,279

Source: Gosende, R. & Gürüz, K. (2007); Project Atlas 2014, 2024

Note: The data reflects stock figures over the specified time period.

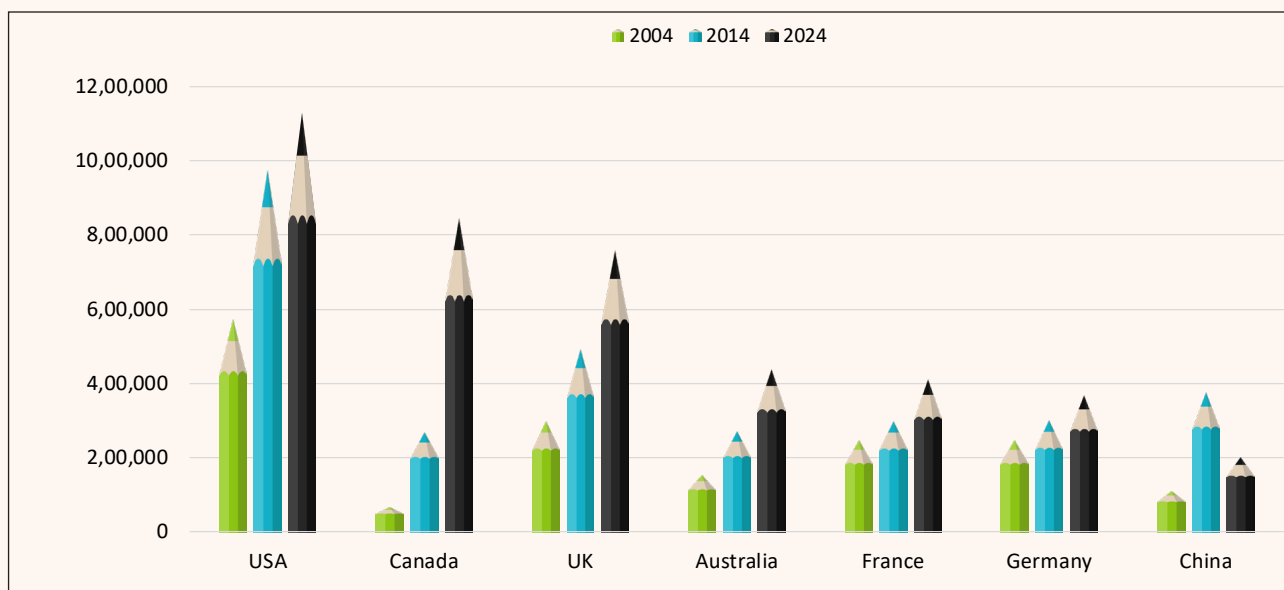


Figure 2: Top 7 Host Countries for International Students (2004-2024)

Figure 2 reveals the leading host countries for international students over two decades with USA, Canada and UK emerging as the top three destinations in 2024. Other significant destinations include Australia, France, Germany and China, each attracting a globally mobile student population. The USA has consistently remained the top destination with international student numbers rising from 5.73 lakhs in 2004 to 9.75 lakhs in 2014 and reaching 11.27 lakhs in 2024. This sustained lead underscores the enduring appeal of American higher education, driven by enhancing the quality of higher education, building national reputation and competitiveness, promoting knowledge creation and innovation, preparing students for the global workforce and supporting long-term national economic development.

The UK showed steady growth, with student numbers increasing from 3 lakhs in 2004 to 4.94 lakhs in 2014 and rising further to 7.59 lakhs in 2024. This reflects continued efforts to internationalise, as well as policy shifts like introduction of graduate visas. Canada, which was not among the top five in 2004, made remarkable gains to host 2.69 lakh students in 2014 and 8.43 lakhs by 2024. This rapid growth of ~14 times over 20 years can be attributed to several factors, including Canada's recent International Education Strategy (2019–2024), which focuses on diversifying source countries, supporting Canadian students studying abroad, and building sustainable global partnerships, aligning with the country's broader commitment to equity and global citizenship.

Though their relative rankings declined, Germany and France showed consistent yet slower growth, hosting over 3.68 and 4.12 lakh students respectively by 2024. Australia demonstrated significant expansion, growing from 1.52 lakh students in 2004 to 4.37 lakh in 2024, bolstered by targeted recruitment and regional partnerships. China, a top host in 2014, experienced a relative decline by 2024, while new entrants such as South Korea and Spain reflect evolving student preferences for studying abroad.

5.2 Source Countries of International Students: Leading Places of Origin for Top 5 Host Countries

The patterns of international student mobility are also deeply influenced by the source countries from which students originate. Host countries often receive students from specific regions based on historical ties, language, bilateral agreements and migration networks. While countries like China and

India have traditionally been major sources due to their large youth populations, shifts in economic development, domestic education capacity and geopolitical factors have led to diversification in student origins.

Table 3: Top 5 Source Countries for Top 5 Host Countries (2014-2024)

Year	2014				2024			
Rank	Top Host Country	Top 5 Source Countries	No. of Students from Top 5 Source Countries	% of Total International Students from Top 5 Source Countries	Top Host Country	Top 5 Source Countries	No. of Students from Top 5 Source Countries	% of International Total Students from Top 5 Source Countries
1	USA	China, India, South Korea, Saudi Arabia, Canada	5,27,448	54.1	USA	India, China, South Korea, Canada, Taiwan	7,04,304	62.5
2	UK	China, USA, India, Nigeria, Germany	1,78,610	36.1	Canada	India, China, Nigeria, Philippines, France	5,53,220	65.6
3	China	South Korea, USA, Thailand, Russia, Japan	1,40,681	37.3	UK	India, China, Nigeria, Pakistan, USA	4,57,030	60.2
4	Germany	Turkey, China, Russia, Austria, Italy	99,431	32.9	Australia	China, India, Nepal, Vietnam, Pakistan	3,00,951	68.7
5	France	Morocco, China, Algeria, Tunisia, Italy	1,07,201	35.8	France	Morocco, Algeria, China, Italy, Senegal	1,38,193	33.5

Source: Project Atlas 2014, 2024

Note: The data reflects stock figures over the specified time period.

As depicted in Table 3, the decade from 2014 to 2024 reflects a diversification in the landscape of international student mobility across major host countries with respect to their source countries. In 2014, USA led as the top host country, with China, India, South Korea, Saudi Arabia and Canada accounting for 54.1% of its international students. By 2024, the USA remained the largest host, but with a change in source countries. India overtook China as the leading sender, alongside South Korea, Canada and Taiwan, raising the share of the top five countries to 62.5%.

The UK, which earlier drew its largest cohorts from China, USA, India, Nigeria and Germany, was overtaken by Canada as the second-largest destination by 2024. Canada's international student intake grew substantially, with India, China, Nigeria, Philippines and France forming 65.6% of its students. Meanwhile, China is out of the list of top 5 host countries. The UK rose to the third place in 2024, primarily hosting students from India, China, Nigeria, Pakistan and USA, accounting for 60.2% of its total.

Australia emerged as the fourth major host, attracting students from China, India, Nepal, Vietnam, and Pakistan, who together made up 68.7% of its international cohort. France remained in the top five across both years, but the profile of its student inflows shifted slightly, with Morocco, Algeria, China, Italy and Senegal making up 33.5% of its total in 2024. The trend reflects the rising dominance of India and China as key source countries and an increasing concentration of international enrolments coming from a narrower group of sending nations.

5.3 International Students as a Percentage of Total Higher Education Enrolment: Leading Countries and India

International student enrolment as a percentage of total higher education enrolment is a key indicator of a country's global engagement in the academic sector. It reflects how attractive a nation's higher education system is to students from around the world. A higher proportion of international students brings numerous benefits, including enhanced cultural diversity, enriched classroom learning, robust research collaboration and significant economic contributions.

Table 4: International Students as a Percentage of Total Higher Education Enrolment (2014-2024)

Year	2014		2024	
Rank	Country	% of Students	Country	% of Students
1	UK	22	Canada	39
2	Australia	21	Australia	31
3	Ireland	16	UK	27
4	Canada	14	Netherlands	16
5	Netherlands	13	France, Finland & Hungary	14
6	Denmark	12.5	Germany	13
7	France	12	New Zealand	12
8	Germany	11	Denmark & Sweden	11
9	New Zealand	10.5	Spain & Poland	9
10	Norway	10	South Korea	7
11	India	0.12	India (2022)	0.10

Source: Project Atlas 2014, 2024; India's data from AISHE 2014-15, 2021-22

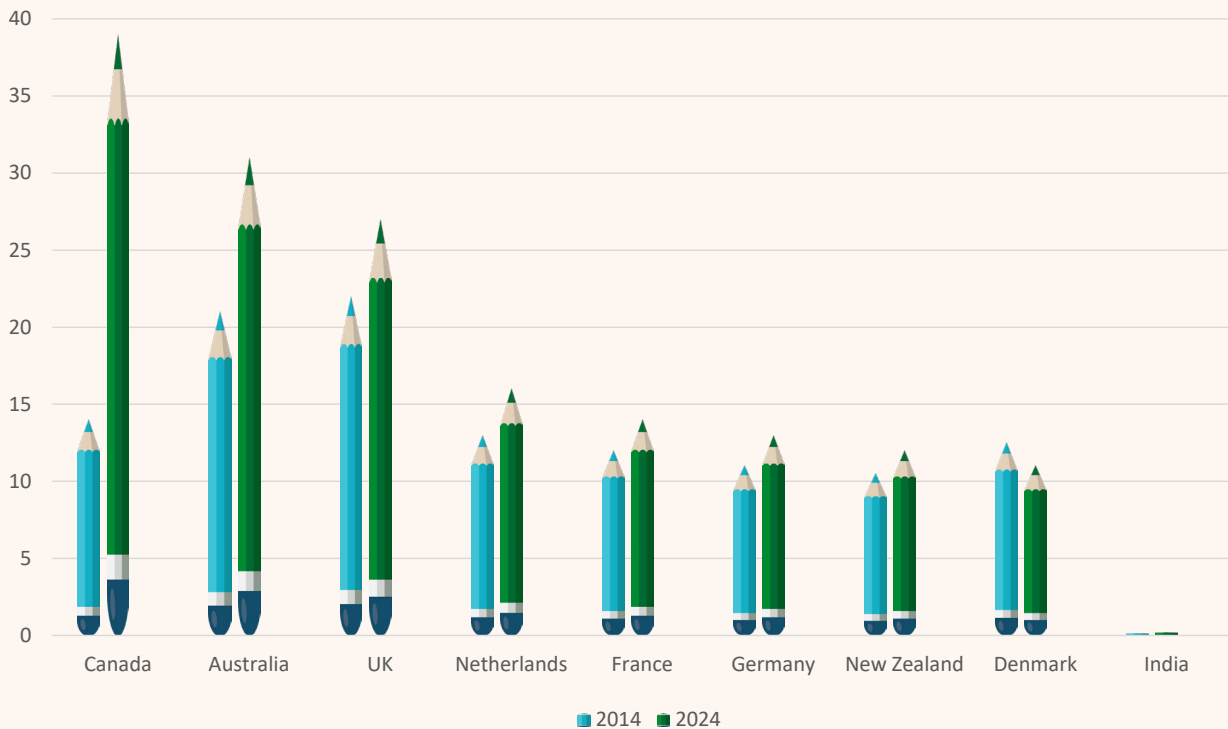


Figure 3: International Students as a Percentage of Total Higher Education Enrolment (2014-2024)

Figure 3 indicates that Canada witnessed a dramatic rise in international students as a percentage of total higher education enrolment from 14% to 39% between 2014 and 2024, making it the top-ranking country in this category in 2024. This surge reflects Canada's deliberate efforts to attract global talent through supportive immigration policies and globally ranked institutions. Australia demonstrated significant growth from 21% to 31% over the same period, remaining a preferred destination due to its strong academic offerings, student support systems and strategic positioning in the Asia-Pacific region.

While the UK continues to benefit from its historic academic reputation and globally recognized universities, recent shifts in visa policies and competition from other English-speaking countries has moderated its growth from 22% in 2014 to 27% in 2024. The Netherlands witnessed a smaller but steady increase, from 13% to 16%, aided by the growing availability of English-taught programmes and concerted internationalisation strategies. Similarly, France and Germany experienced modest increases from 12% to 14% and from 11% to 13% respectively, particularly due to affordable tuition fees and research opportunities. In contrast, New Zealand's share grew marginally from 10.5% to 12%, while Denmark's declined from 12.5% to 11%, indicating a loss of momentum in attracting international students.

India, however, remains an outlier with a negligible percentage of international students and a decrease from 0.12% in 2014 to 0.10% in 2022. Despite its ambitions to become a global higher education destination, India's share of international students remains minimal due to challenges such as limited branding, communication and outreach of its higher education system abroad, infrastructure gaps and regulatory barriers that hinder international mobility. This trend underscores the urgent need for reforms to strengthen India's global visibility and institutional capacity.

6. International Student Mobility: Indian Overview

In recent decades, India has aimed to position itself as a preferred destination for learners worldwide with its expanding academic infrastructure, growing emphasis on quality, commitment to affordability, and policy enablers. At the same time, it continues to be a significant contributor to outbound student flows.

6.1 Inbound Mobility of Students to India: A Two-Decade Analysis

India's inbound student mobility has undergone significant changes over the past two decades, marked by three broad phases: a gradual build-up in the early 2000s, a sharp rise between 2012 and 2019 and a period of mild fluctuation post-2020. Figure 5 displays the inbound mobility trajectory from 2000-01 to 2021-22 revealing a steady expansion in India's higher education footprint and progression in attracting international students.

Table 5: Inbound Mobility of Students to India (2000–2022)

Academic Year	No. of International Students Studying in India	No. of Students Enrolled in Higher Education (in crores)	International Students as a % of Total Higher Education Enrolment in India ²
2000-01	6,896	0.84	0.08
2004-05	13,267	1.04	0.12
2008-09	21,778	2.16	0.10
2012-13	34,774	3.02	0.11
2013-14	39,517	3.23	0.12
2014-15	42,293	3.42	0.12
2015-16	45,424	3.46	0.13
2016-17	47,575	3.57	0.13
2017-18	46,144	3.66	0.12
2018-19	47,427	3.74	0.12
2019-20	49,348	3.85	0.12
2020-21	48,035	4.13	0.11
2021-22	46,878	4.33	0.10

Source: Yeravdekar, V. R. (2016); UGC Annual Report 2000-01, 2004-05; Statistics of Technical and Higher Education 2008-09; AISHE Report 2012-13 to 2021-22

Note: The data reflects stock figures over the specified time period.

² Calculation: Percentage = $(x \div y) \times 100$, where x = number of international student enrolments in a given year, and y = total number of students enrolled in higher education in that year

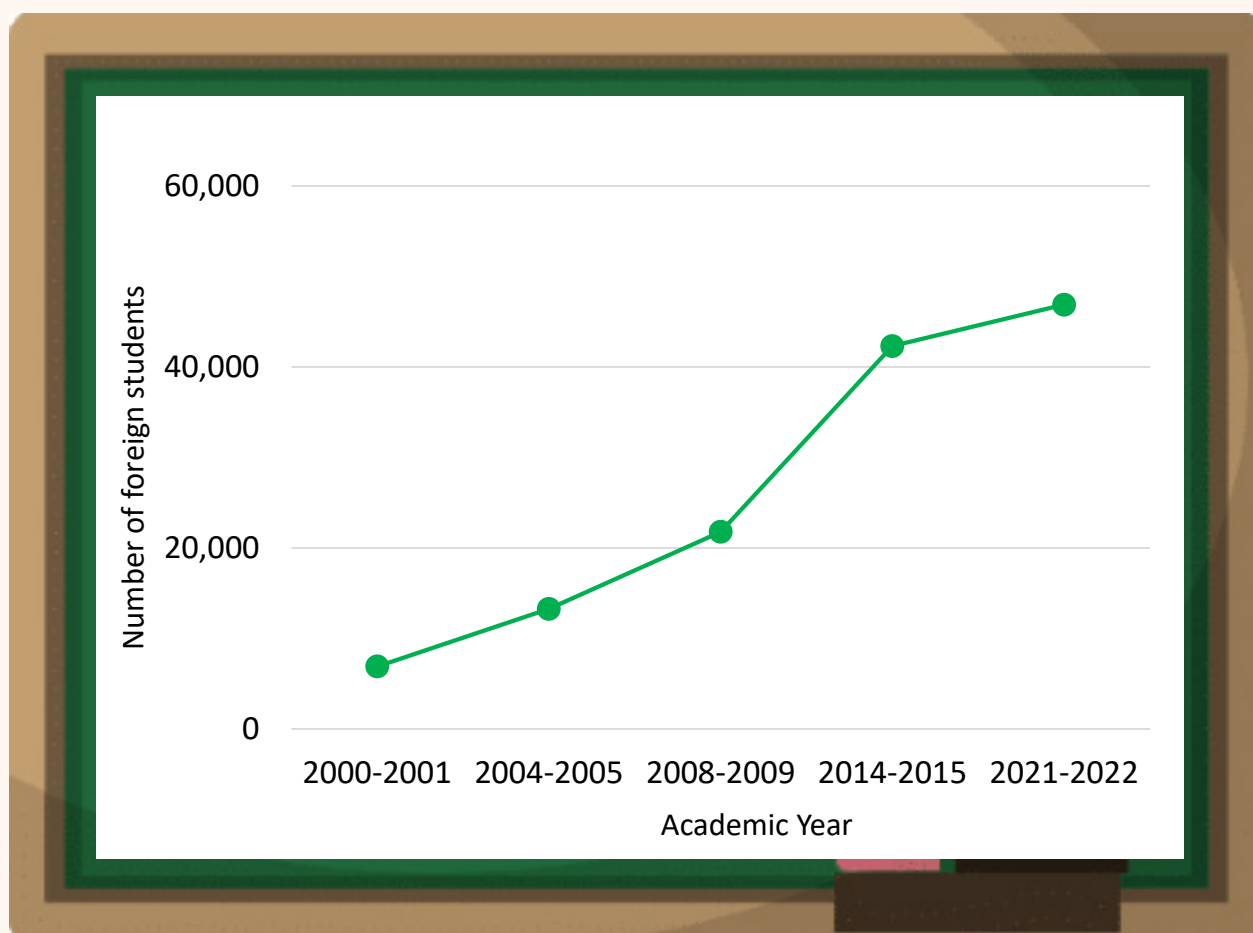


Figure 4: Inbound Mobility of Students to India (2000–2022)

Table 5 indicates that India hosted just 6,896 international students in 2000–01. This number noted modest but consistent growth in the early years of the 21st century, reaching 21,778 by 2008–09. The momentum picked up more clearly from 2012–13 onwards, with enrolment jumping to 34,774 students and then steadily increasing year-on-year. Between 2012 and 2019, India experienced a 42% increase of inbound international students peaking at 49,348 in 2019–20. This growth phase can be attributed to a mix of pull factors, including affordable tuition, a wide range of English-medium programmes, government-led scholarship schemes and quality of education at leading Indian HEIs. India's long standing educational and cultural ties with South Asia and parts of Africa also contributed to sustained flows.

The period 2020–22 witnessed stagnation and mild decline due to the global COVID-19 pandemic's impact on student mobility. Numbers dipped to 48,035 in 2020–21 and 46,878 in 2021–22, a reversal from the pre-pandemic high. This disruption coincided not only with international travel restrictions but also with domestic changes like declining preference for engineering courses, which historically attracted many international students.

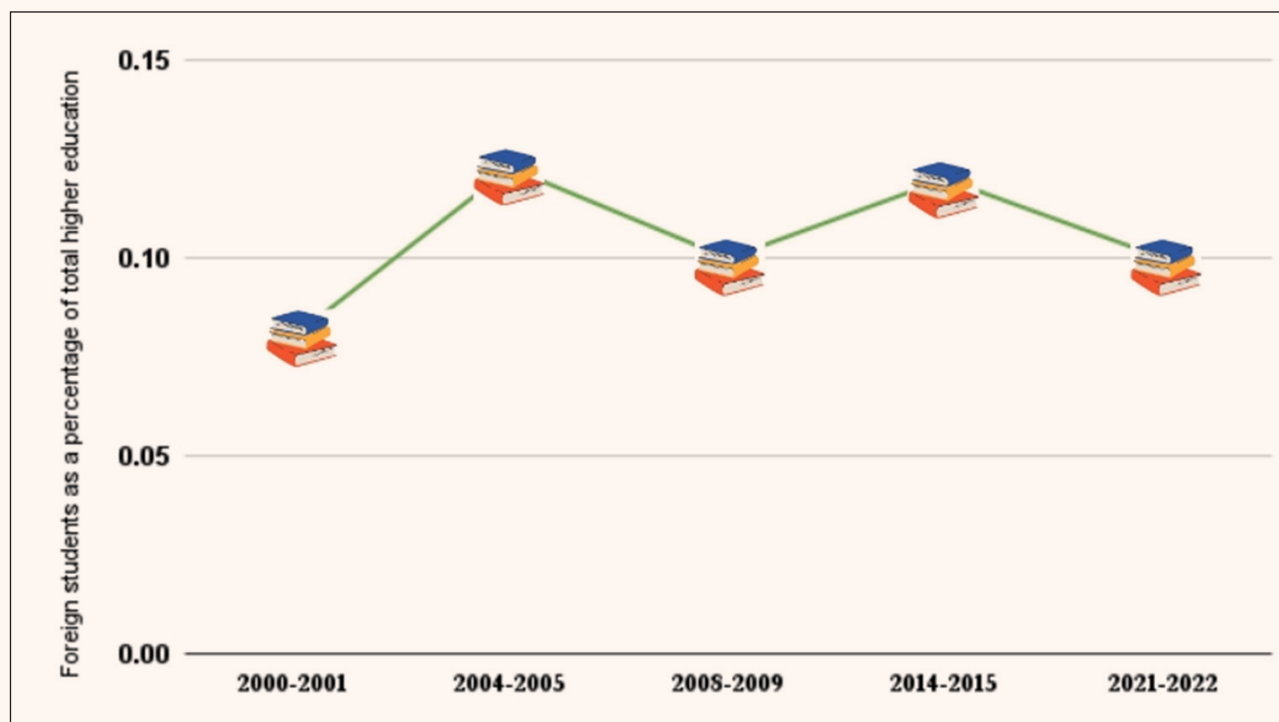


Figure 5: International Students as a Percentage of Total Higher Education Enrolment in India (2000-2022)

The inbound mobility of international students to India has historically remained a small fraction of total higher education enrolment. Figure 5 depicts international students as a percentage of total higher education enrolment in India from 2000-01 to 2021-22, showing a generally stable but modest trend with a slight decline in the latter years. In 2000-01, international students constituted only 0.08% of total enrolments. The early 2000s recorded modest percentages, with a rise to 0.12% by 2004-05, reflecting nascent internationalisation efforts and limited global appeal of Indian HEIs at the time.

By the mid-2010s, there was a gradual rise in the proportion of international students. From 0.11% in 2012-13, the share grew to a peak of 0.13% in 2016-17. This period corresponds with increased efforts by Indian institutions and policymakers to attract international students, improvements in institutional quality and expanding bilateral educational ties. Between 2017-18 and 2019-20, the percentage of international students hovered around 0.12%, indicating gradual growth in international student numbers aligned with an expanding overall higher education sector.

However, from 2020-21 onwards, there is a noticeable dip in the share of international students, falling to 0.11% in 2020-21 and further to 0.10% in 2021-22, reflecting the impact of the COVID-19 pandemic which disrupted international travel, created uncertainty in cross-border mobility and affected global student flows. While the total number of students in India's higher education system continued to grow during these years, the international student population did not keep pace, leading to a reduced proportion.

6.1.1 Top 10 Source Countries of International Students in India: A Decadal Analysis

Over the past decade, India has witnessed evolving patterns in the inflow of international students, reflecting broader geopolitical, economic and educational shifts. This section presents a decadal

analysis of the top source countries sending students to India, offering insights into regional trends and emerging partnerships. Understanding these dynamics is crucial for shaping future internationalisation strategies.

Table 6: Top 10 Source Countries of International Students in India (2012-13 to 2021-22)

Year	2012–2013		2017-18		2021–2022	
Rank	Country	No. of Students	Country	No. of Students	Country	No. of Students
1	Nepal	7,167	Nepal	11,521	Nepal	13,126
2	Bhutan	2,468	Afghanistan	4,378	Afghanistan	3,151
3	Afghanistan	2,330	Sudan	2,220	USA	2,893
4	Iran	2,109	Bhutan	1,999	Bangladesh	2,606
5	Malaysia	1,874	Nigeria	1,866	UAE	2,287
6	Iraq	1,747	Bangladesh	1,566	Bhutan	1,562
7	Sudan	1,649	Iran	1,558	Nigeria	1,387
8	Rwanda	1,027	Yemen	1,471	Tanzania	1,264
9	Sri Lanka	1,001	USA	1,418	Zimbabwe	1,058
10	USA	852	Sri Lanka	1,248	Sudan	982

Source: AISHE Report 2012-13, 2017-18 & 2021-2022

Note: The data reflects stock figures over the specified time period.

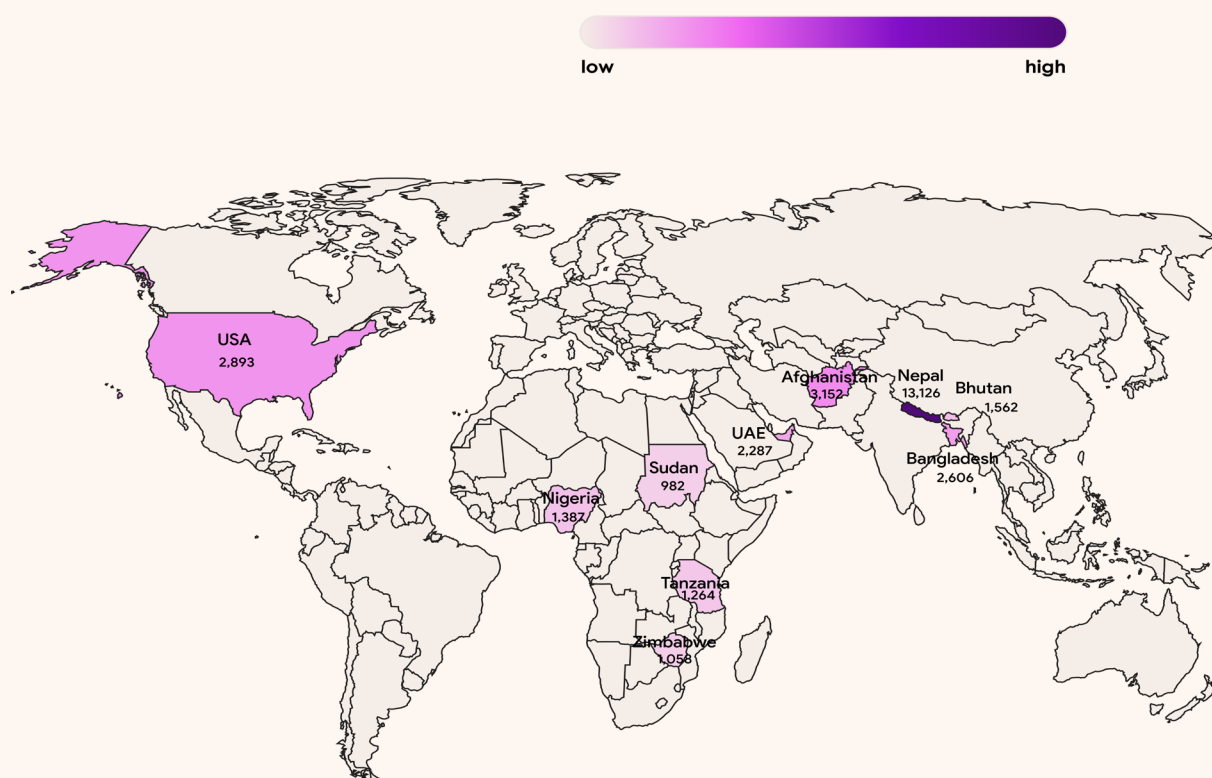


Figure 6: Top 10 Source Countries of International Students in India (2021-22)

Table 6 illustrates the changing profile of international students in India over the decade from 2012-13 to 2021-22. Nepal has consistently been the leading source country, with student numbers increasing steadily from 7,167 in 2012-13 to 13,126 in 2021-22. This reflects strong historical, cultural and educational ties, geographical proximity and favourable bilateral arrangements between the two countries. Afghanistan also featured prominently throughout the period, rising from 2,330 in 2012-13 to 4,378 in 2017-18 but witnessed a decline to 3,151 in 2021-22 influenced by domestic instability and evolving migration dynamics.

Countries such as the UAE, Nigeria, Zimbabwe, and Tanzania entered the top 10 list by 2021-22, indicating broader outreach and India's increasing appeal as a higher education destination. Conversely, some countries that were once among the top contributors such as Iran, Iraq, Malaysia, Rwanda and Sri Lanka no longer appear in the latest rankings, suggesting shifts in geopolitical contexts and student preferences. Despite some fluctuation, nations like USA, Bhutan, and Sudan maintained a presence throughout the decade, reflecting enduring educational linkages. The marginal increase in share suggests a steady if not accelerated growth, potentially through exchange programmes, research collaborations or niche interests.

A significant observation is that many of India's top source countries like Afghanistan, Sudan, Nigeria and Yemen have experienced prolonged political or economic instability. While India has served as an important higher education haven for students from conflict-affected regions, a more balanced strategy would involve expanding its internationalisation efforts toward stable and emerging economies across Southeast, Central and West Asia, Anglophone Africa, Europe and Oceania. This would strengthen India's global academic reputation and reduce volatility in enrolment trends.

6.1.2 Inbound International Student Trends: State-wise Overview

The State-wise distribution of international students in India between 2012 and 2022 reveals regional variations in international student concentration, with certain States emerging as consistent leaders in attracting inbound mobility. These patterns point to the influence of factors such as institutional capacity, regional connectivity and targeted State-level policies.

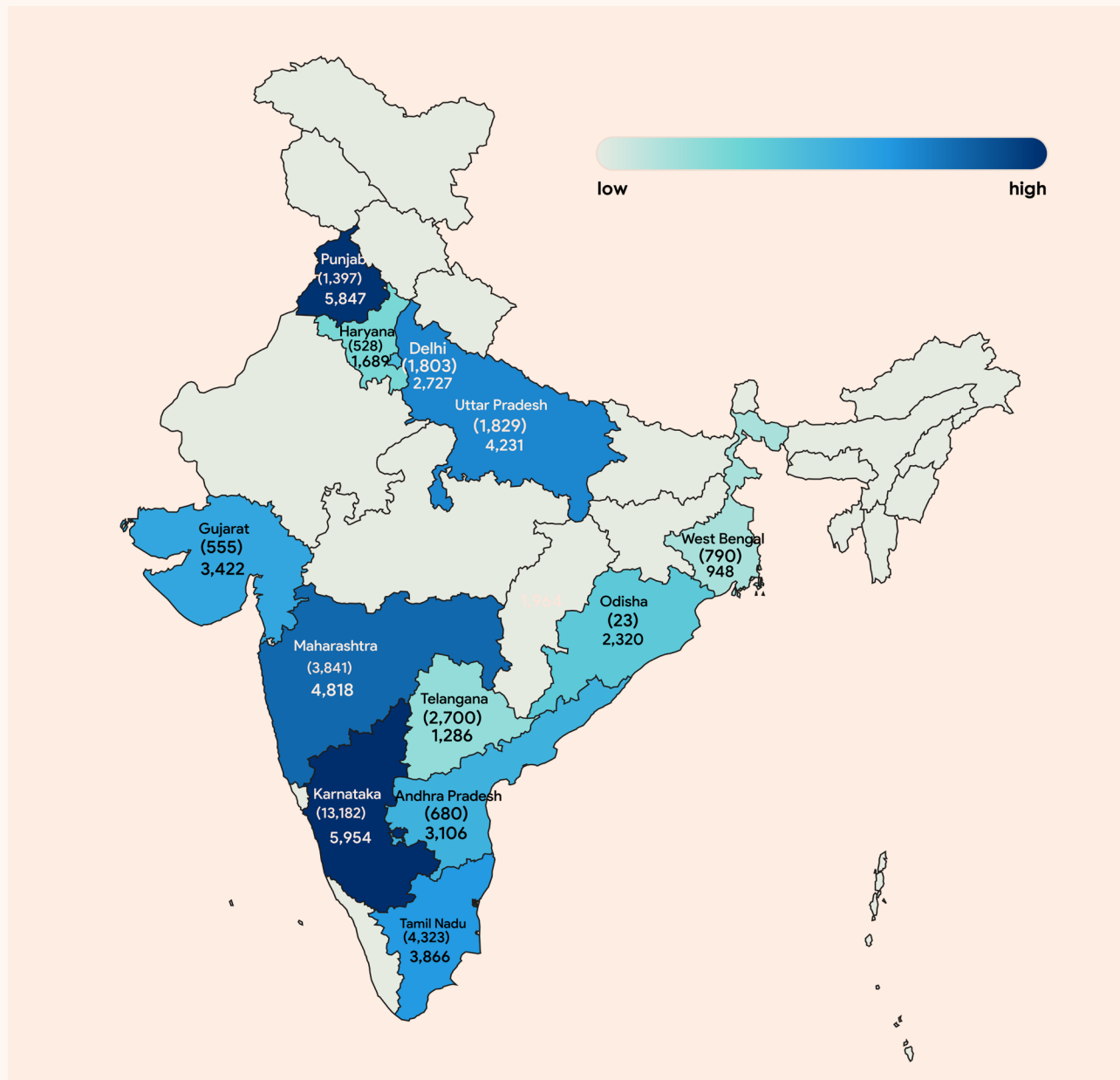
Table 7: Top 10 States with International Student Enrolment in India (2012-13 to 2021-22)

Year	2012-13		2017-18		2021-22	
Rank	State	No. of Students	State	No. of Students	State	No. of Students
1	Karnataka	13,182	Karnataka	11,947	Karnataka	5,954
2	Tamil Nadu	4,323	Maharashtra	4,297	Punjab	5,847
3	Maharashtra	3,841	UP	4,371	Maharashtra	4,818
4	Telangana	2,700	Punjab	3,719	UP	4,231
5	UP	1,829	Tamil Nadu	3,532	Tamil Nadu	3,866
6	Delhi	1,803	Telangana	2,802	Gujarat	3,422
7	Punjab	1,397	Delhi	2,165	AP	3,106

Year	2012-13		2017-18		2021-22	
8	West Bengal	790	AP	2,087	Delhi	2,727
9	AP	679	Haryana	2,012	Odisha	2,320
10	Gujarat	555	Gujarat	1,682	Haryana	1,689

Source: AISHE Report 2012-13, 2017-18, 2021-22

Note: The data reflects stock figures over the specified time period for UG, PG, M.Phil., PhD, Diploma & PG Diploma courses.



**Figure 7: Transition in International Student Enrolment Across Top 10 Indian States
(2012-13 to 2021-22)**

Note: Bracketed figures refer to 2012-13; unbracketed to 2021-22.

Table 7 displays data on international student enrolment in Indian States from 2012-13 to 2021-22 highlighting important trends in international student preferences and institutional outreach in India. One of the most striking observations is the significant decline in overall international enrolment numbers in States that were previously major hubs. For instance, Karnataka experienced about 55% decrease from 13,182 students in 2012-13 to 5,954 in 2021-22. This may be attributed to increased competition and a plateau in institutional capacity to attract international students. Similarly, Tamil Nadu's enrolment declined from 4,323 to 3,866 over the same period, suggesting a need for renewed internationalisation efforts.

In contrast, some States witnessed a sharp rise in international student numbers, indicating emerging hubs for international education. Punjab experienced a 300% increase from 1,397 students in 2012-13 to 5,847 in 2021-22 with enhanced outreach and better alignment of courses with international demand. Uttar Pradesh, Andhra Pradesh and Gujarat also recorded strong growth in enrolments, reflecting a wider dispersion of international students across India. Traditional destinations like Delhi and Maharashtra have a relatively stable overall presence.

States like Odisha and Haryana notably emerged as new and important destinations by 2021-22, pointing to the growing role of State-level higher education policies and institutional development in attracting international students. Despite the presence of top HEIs in Kolkata and Hyderabad, West Bengal and Telangana have dropped out of the top 10 States for international student enrolment between 2012-13 and 2021-22, indicating shifting regional dynamics.

6.1.3 Inbound International Student Trends: Analysis by Level & Stream (2012-13 to 2021-22)

An analysis of international student preferences by academic levels and streams offers valuable insights into how global learners are navigating choices in higher education, showing both continuity and transformation in enrolment patterns. Emerging shifts in stream preferences could be understood by examining enrolment patterns across levels such as PhD, M.Phil., Undergraduate and Postgraduate, Diploma and PG Diploma, Certificate and Integrated in disciplines such as engineering, business, health sciences, social sciences and humanities amongst others.

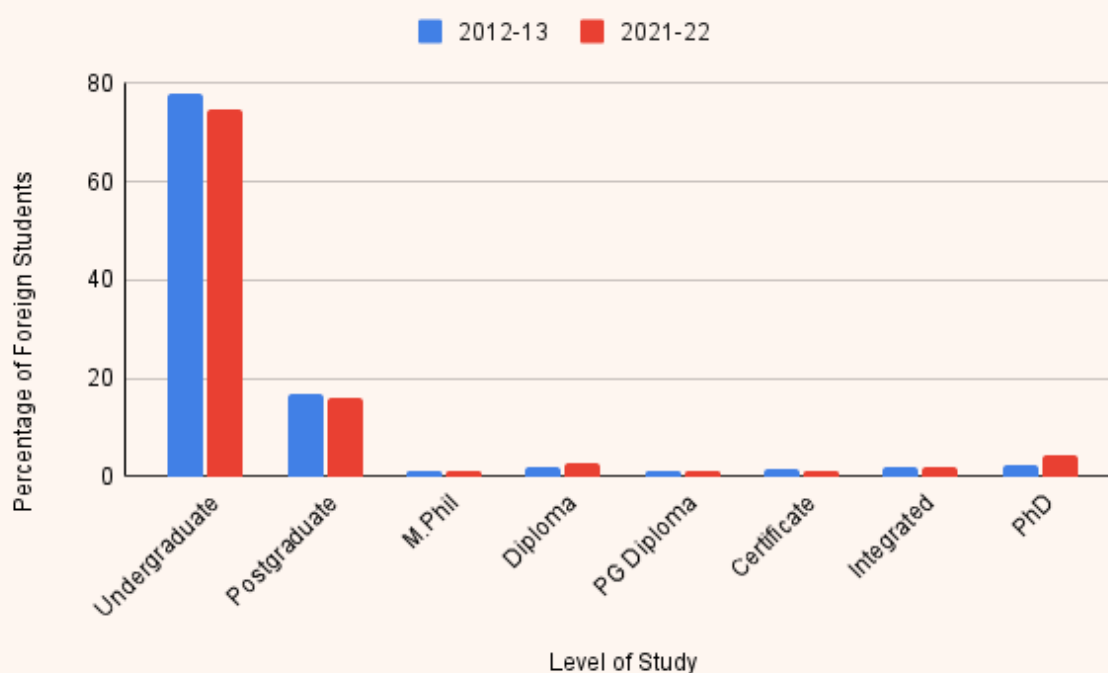


Figure 8: Enrolment of International Students Across Levels (2012-13 to 2021-22)

Source: AISHE Report (2012-13, 2021-22)

Figure 8 shows international student enrolments across levels such as PhD, M.Phil., Undergraduate and Postgraduate, Diploma and PG Diploma, Certificate and Integrated courses in the years 2012-13 and 2021-22. It is observed that the undergraduate programmes have attracted the highest number of international students over the past decade. According to AISHE Report 2021-22, there are 13 programmes with 1,000+ enrolment of which the highest number of students are enrolled in Bachelor of Technology (11,461), followed by Bachelor of Business Administration (3,346) and Bachelor of Science (3,289) programmes.

Table 8: Inbound Students to India: By Stream (2012-13 to 2021-22)

Year	B.Tech	BBA	B.Sc.	B.E.	PhD	B.Pharm	B.Com	B.A.	MBA	BCA	MBBS	Others
2012-13	2,733	1,668	1,849	1,591	832	2,625	2,157	2,623	1,056	2,010	2,289	13,341
2013-14	4,132	2,120	2,204	1,864	917	2,583	2,318	2,244	1,020	2,216	2,734	11,209
2014-15	4,478	2,803	2,623	1,881	1,142	2,683	2,598	3,450	1,270	2,227	2,357	14,362
2015-16	5,941	3,228	2,913	2,332	1,139	2,762	2,776	3,113	1,445	2,478	2,164	15,124
2016-17	6,818	4,192	3,152	2,453	1,482	2,526	2,691	2,758	1,439	2,262	1,853	15,335
2017-18	7,610	35,89	3,002	2,490	1,493	2,629	1,992	26,59	1,330	2,667	1,719	13,886
2018-19	8,861	3,354	3,320	2,576	1,560	2,498	1,734	2,226	1,574	1,873	1,429	14,098
2019-20	9,503	3,290	3,964	2,596	1,614	2,451	1,928	2,295	1,707	1,820	1,779	13,620
2020-21	11,245	3,314	3,439	2,541	1,444	2,021	2,605	1,817	2,099	1,918	944	12,661
2021-22	11,461	3,346	3,289	2,978	2,012	1,954	1,935	1,798	1,717	1,517	840	12,840

Source: AISHE Report 2012-13 to 2021-2022

Note: The data reflects stock figures over the specified time period.

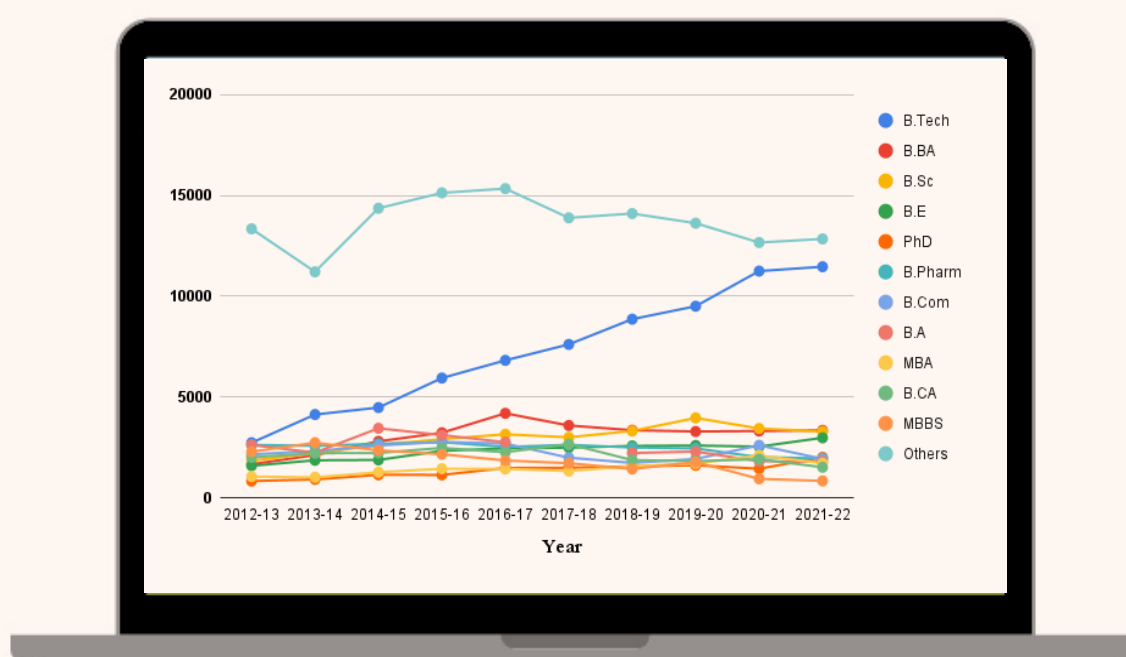


Figure 9: Inbound Students to India: By Stream (2012-13 to 2021-22)

Table 8 displays notable shifts in the academic preferences (by stream) of international students coming to India between 2012-13 and 2021-22. Programmes like B.Tech., B. Pharma, B.A. and MBBS were the most popular in 2012-13, with B.Tech. enrolments rising over 4x from 2,733 in 2012-13 to 11,461 in 2021-22. This strong performance reflects India's reputation for cost-effective, English-medium technical education. The sharp growth of B.Tech. suggests a broader market preference for specific institutions or formats of engineering education.

Business and Management programmes such as BBA and MBA experienced steady and moderate growth. BBA enrolments grew from 1,668 to 3,346 and MBA numbers rose from 1,056 to 1,717 over the decade, reflecting growing interest in industry-oriented and globally transferable managerial skills. Science and humanities disciplines such as B.Sc. and B.A. maintained consistent appeal, though their numbers fluctuated year to year. Interestingly, MBBS enrolments declined from 2,289 in 2012-13 to just 840 in 2021-22 due to regulatory hurdles and rising competition from other destination countries.

The data also highlights a gradual rise in interest in applied and vocational disciplines such as B.Pharm, BCA, and PhD programmes. While absolute numbers in these streams remain modest, their stability suggests a broadening of India's appeal beyond traditional STEM fields. Additionally, the large and fluctuating 'Others' category ranging from 11,209 to over 15,000 students across the years points to a growing number of students opting for diploma, certificate or non-conventional courses. This evolving trend indicates that while Engineering remains a cornerstone of India's inbound education market, international students are increasingly drawn to a more diverse array of academic opportunities aligned with global employment trends.

6.2 Outbound Mobility of Students from India: A Decadal Analysis

The outbound mobility of Indian students has shown a sharp and sustained upward trend over the past decade, reflecting India's transformation into the world's largest source of international students. This analysis seeks to understand the dynamics behind this surge in outbound mobility, including shifts in destination countries and emerging patterns such as preference for specific programmes, institutions and geographies.

Table 9: Outbound Mobility of Students from India (2016-2024)

Academic Year	No. of Outbound Students	% Change (YoY) in Outbound Mobility ³
2016	6,84,823	-
2017	8,06,326	17.74
2018	6,20,156	-23.08
2019	6,75,541	8.93
2020	6,85,097	1.41
2021	11,58,702	69.09
2022	9,07,404	-21.72
2023	13,18,955	45.35
2024	13,35,878	1.28

Source: Ministry of External Affairs; data.gov.in

Note: The data reflects stock figures over the specified time period.

³ Calculation: Percentage change in Outbound Mobility = $[(n1 - n2) \div n2] \times 100$ where n1 = no of outbound students in present year and n2 = no of outbound students in previous year

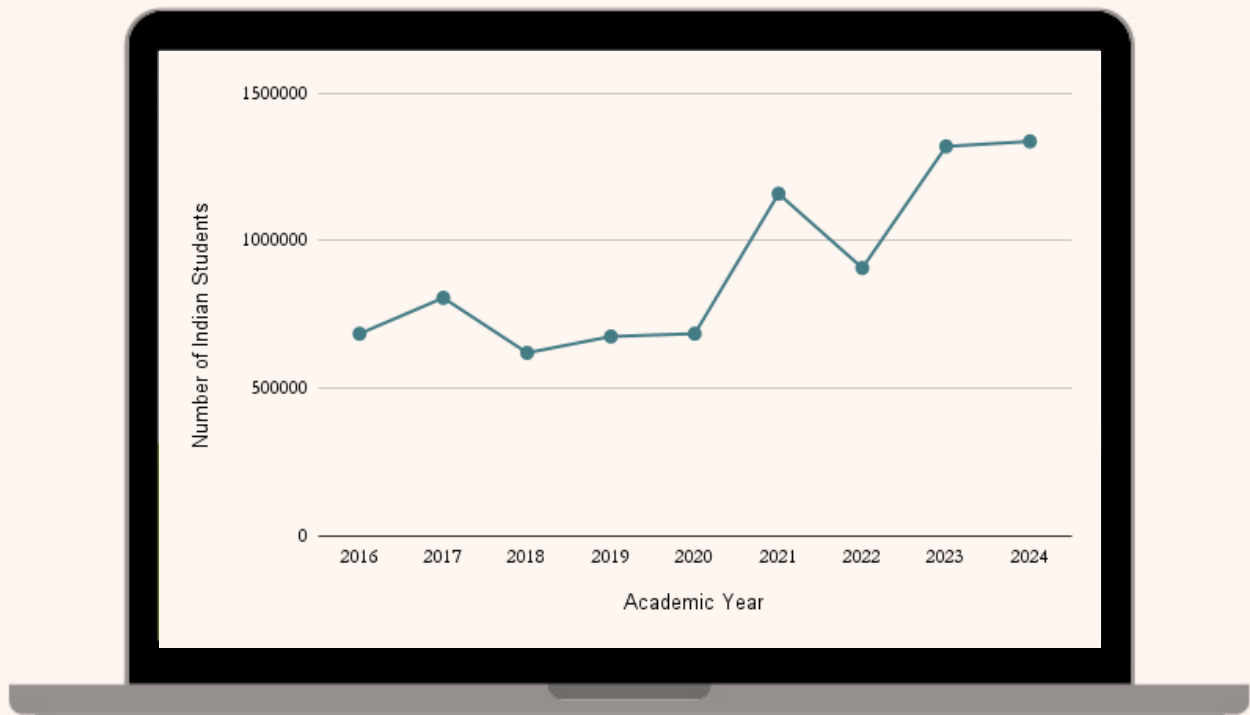


Figure 10: Outbound Mobility of Students from India (2016-2024)

Table 9 provides year-wise data of the number of Indian students pursuing education abroad from 2016 to 2024, along with the corresponding percentage change (YoY) in outbound mobility. In 2016, 6,84,823 Indian students went abroad. This number increased significantly in 2017 to 8,06,326, marking a 17.74% rise. However, 2018 recorded a sharp decline to 6,20,156 students, a 23.08% decrease from 2017. The count recovered modestly in 2019 to 6,75,541 students, up by 8.93% and edged up again in 2020 to 6,85,097, a marginal rise of 1.41%. The most dramatic shift came in 2021, with a jump to 11,58,702 students, translating to a 69.09% surge likely driven by post-pandemic reopening. However, 2022 experienced a significant dip to 9,07,404. This was followed by a strong recovery in 2023, which recorded 13,18,955 outbound students, an increase of 45.35%. In 2024, the number increased to 13,35,878, suggesting a potential plateau or stabilization after years of volatility. The outbound student mobility from India recorded a compounded annual growth rate (CAGR) of 8.84% between 2016 and 2024.⁴

6.2.1 Outbound International Student Trends: Top 10 study destinations of Indian students

There has been a significant transformation in the landscape of international higher education for Indian students over the past decade. With globalization and increasing aspirations for quality higher education, the number of Indian students pursuing studies abroad has surged. A comparison of data from 2014 and 2024 illustrates a dramatic shift not just in volume but also in preferred study destinations.

⁴ Calculation of CAGR: Percentage change in Outbound Mobility = $(E/B)^{(1/N)} - 1$ where E = ending year value, B = beginning year value and N = no of years

Table 10: Top 10 Study Destinations for Indian students (2016-2024)

Year	2016		2020		2024	
Rank	Host Country	No. of Indian Students	Host Country	No. of Indian Students	Host Country	No. of Indian Students
1	USA	4,23,863	Canada	1,79,480	Canada	4,27,000
2	Canada	94,240	USA	1,67,582	USA	3,37,630
3	Australia	78,103	Australia	1,15,137	UK	1,85,000
4	UK	16,559	UK	90,300	Australia	1,22,202
5	Ukraine	10,963	Germany	35,147	Germany	42,997
6	Germany	10,820	Ukraine	18,429	UAE	25,000
7	Philippines	8,500	Russia	14,370	Russia	24,940
8	Russia	6,903	Philippines	13,227	Kyrgyzstan	16,500
9	France	3,291	Georgia	5,992	Georgia	16,093
10	Georgia	3,000	Italy	4,634	Philippines	9,665

Source: Ministry of External Affairs; data.gov.in

Note: The data reflects stock figures over the specified time period.

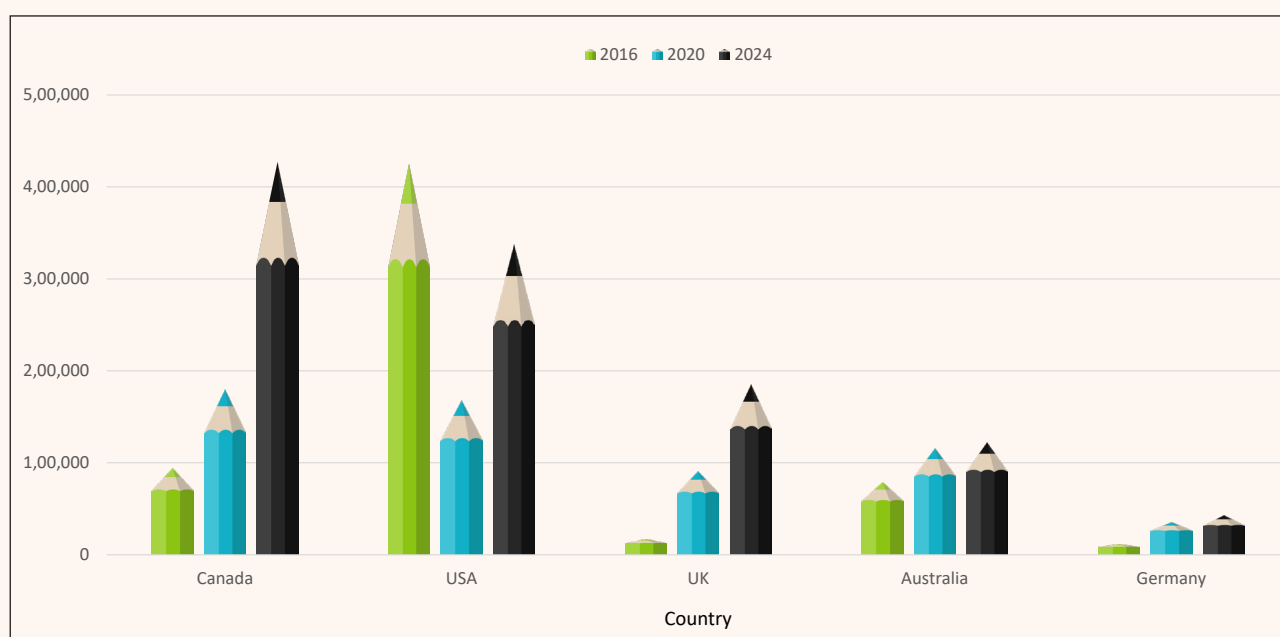


Figure 11: Top 5 Study Destinations for Indian students (2016-2024)

Table 10 presents data on the top study destinations for Indian students from 2016 to 2024 revealing trends that reflect changing geopolitical dynamics, immigration policies and students' evolving priorities regarding affordability, post-study work opportunities and quality of education. USA consistently remained a top destination, leading with 4.24 lakh Indian students in 2016, 1.68 lakh in 2020 and 3.38 lakh in 2024. Canada showed a remarkable increase of 350% in popularity, climbing

from 94,240 students in 2016 to top position in both 2020 and 2024, hosting 1.79 lakh and 4.27 lakh students respectively. Australia held third place in both 2016 with 78,103 students and 2020 with 1.15 lakh students, but slipped to fourth despite a modest increase to 1.22 lakh students in 2024. The UK witnessed a dramatic rise in Indian student numbers, growing from just 16,559 in 2016 to 90,300 in 2020 and further to 1.85 lakh by 2024. This significant upward trajectory indicates renewed interest possibly due to changes in visa policies and the introduction of post-study work opportunities. Germany has also experienced consistent growth with 10,820 students in 2016 to 35,147 students in 2020, reaching 42,997 by 2024.

Beyond the top five destinations, other countries such as UAE, Russia, Georgia, Philippines, Ukraine and Kyrgyzstan have consistently featured among the top choices for Indian students, though at significantly lower volumes. These trends suggest a diversification in the choice of study destinations among Indian students, with a growing preference for countries offering affordable education, particularly in medicine and technical fields. While these countries do not yet rival the major Anglophone destinations in scale, they are increasingly catering to niche demands and specific academic interests.

UAE presents an interesting case, overtaking Canada in 2021 to be at the top with 3.25 lakh students. However, the number decreased to 25,000 in 2024, indicating that its attractiveness may have been temporary and more linked to pandemic-era travel restrictions and regional preferences than to long-term academic factors.

According to the Indian Student Mobility Report, almost 8.5 lakh students are pursuing their higher education in just four countries: Canada, USA, UK and Australia spending approximately USD 34 billion (~INR 2.9 lakh crores) in the year 2023-2024. Table 11 represents the country wise details for total expenditure incurred by Indian students on higher education in four leading host countries, which is 48% of the total forex expenditure on education by Indian students in 2025.

Table 11: Total Expenditure by Indian Students on Higher Education in Top 4 Host Countries (2023-24)

	Canada	USA	UK	Australia
Academic Fees	USD 6 bn (~INR 51,000 crores)	USD 7.2 bn (~INR 61,000 crores)	USD 3.4 bn (~INR 29,000 crores)	USD 1.68 bn (~INR 14,000 crores)
Accommodation	USD 3 bn (~INR 25,000 crores)	USD 2.9 bn (~INR 24,000 crores)	USD 1.3 bn (~INR 11,000 crores)	USD 0.99 bn (~INR 8,000 crores)
Living Expenses	USD 2.7 bn (~INR 23,000 crores)	USD 2.4 bn (~INR 20,000 crores)	USD 1.2 bn (~INR 10,000 crores)	USD 1.22 bn (~INR 10,000 crores)
Total	USD 11.7 bn (~INR 1 lakh crores)	USD 12.48 bn (~INR 1.06 lakh crores)	USD 5.9 bn (~INR 50,000 crores)	USD 3.9 bn (~INR 33,000 crores)

Source: Indian Student Mobility Report 2023-24

Note: The data reflects stock figures over the specified time period.

6.2.2 Outbound Indian Student Trends: State-wise Overview

India has long been a major source of international students, with lakhs of students seeking higher education opportunities abroad. A state-wise analysis of outbound student mobility offers valuable insights into regional trends, priorities and socio-economic factors driving international education.

Table 12: Top 10 Source States of Indian Students Going Abroad (2016–2020)

Year	2016		2018		2020	
Rank	State	No. of Students	State	No. of Students	State	No. of students
1	AP	46,818	AP	62,771	AP	35,614
2	Maharashtra	45,560	Punjab	60,331	Punjab	33,412
3	Punjab	36,743	Maharashtra	58,850	Maharashtra	29,079
4	Tamil Nadu	27,518	Gujarat	41,413	Gujarat	23,156
5	Delhi	27,016	Tamil Nadu	38,983	Delhi	18,482
6	Gujarat	24,775	Delhi	35,844	Tamil Nadu	15,564
7	Chandigarh	18,916	Karnataka	26,918	Kerala	15,277
8	Kerala	18,428	Kerala	26,456	Chandigarh	13,988
9	Karnataka	17,719	Chandigarh	26,211	Karnataka	13,699
10	UP	13,776	UP	20,246	UP	8,618

Source: Ministry of External Affairs

Note: The data reflects flow figures over the specified time period as per students' place of issuance of passport.

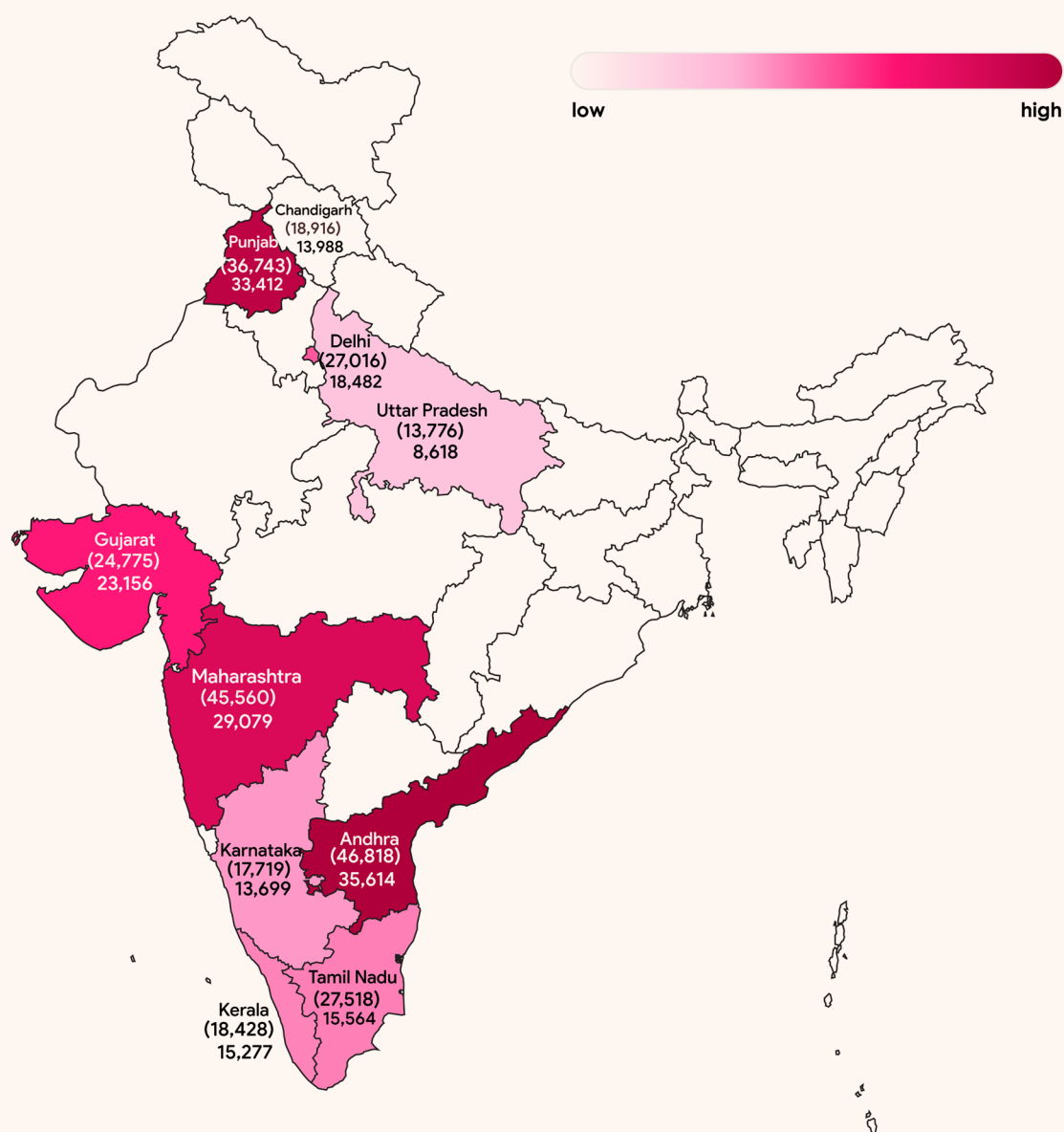


Figure 12: Transition in Top 10 Source States for Indian Students Going Abroad (2016-2020)

Note: Bracketed figures refer to 2016; unbracketed to 2020.

Table 12 presents a State-wise analysis of the top ten Indian States sending students abroad during the years 2016, 2018 and 2020. Andhra Pradesh (AP) consistently emerged as the leading source of outbound students across all three years. The number of students from the State rose from 46,818 in 2016 to 62,771 in 2018, before declining sharply to 35,614 in 2020 likely due to the onset of the pandemic. Punjab followed a similar trajectory, moving from third position in 2016 to second in 2018 and maintaining that position in 2020, though its student numbers dropped from 60,331 in 2018 to 33,412 in 2020. Maharashtra, which was the second-largest contributor in 2016, slipped to third in subsequent years, with its numbers decreasing from 45,560 in 2016 to 29,079 in 2020. Gujarat showed upward mobility, climbing from sixth place in 2016 to fourth in 2018 and 2020. Tamil Nadu and Delhi also remained significant contributors. Southern States such as Karnataka and Kerala featured consistently in the top ten. Uttar Pradesh (UP), while present in all three years, consistently

had the lowest numbers among the top ten States and experienced a significant decline from 13,776 students in 2016 to just 8,618 in 2020.

The data reflects both regional concentrations in outbound student numbers dominated by southern and western States and a general decline across all States in 2020, highlighting the disruptive impact of the global pandemic on international student mobility.

6.2.3 Outbound Indian Student Trends: Analysis by Stream (2010-11 to 2020-21)

An analysis of outbound international student trends by academic stream reveals how students from India are making strategic decisions about their global higher education journeys. Tracking enrolment patterns across disciplines such as Engineering, Business, Health Sciences, Social Sciences and the Humanities between 2018 and 2022 highlights both persistent preferences and evolving aspirations. These trends offer insights into how Indian students respond to global academic opportunities, labour market signals and shifting geopolitical contexts.

Figure 13 depicts the trend in outbound Indian student enrolment by field of study in 2020-21. It reveals a strong preference for STEM and career-oriented disciplines. Engineering (16.4%), and Math & Computer Science (15.7%) together account for over one-third of students, reflecting India's strong interest in technical education and the global demand for IT and engineering professionals. Business & Management (12.6%) is also a major draw, given the popularity of MBAs and related programmes as pathways to international careers. In contrast, fields like Social Sciences (6.6%), Fine & Applied Arts (4.4%), and Communication & Journalism (1.8%) remain less pursued. Health professions (2.8%) also attract a relatively small share, likely due to high costs, stringent licensing requirements, and sufficient domestic options.

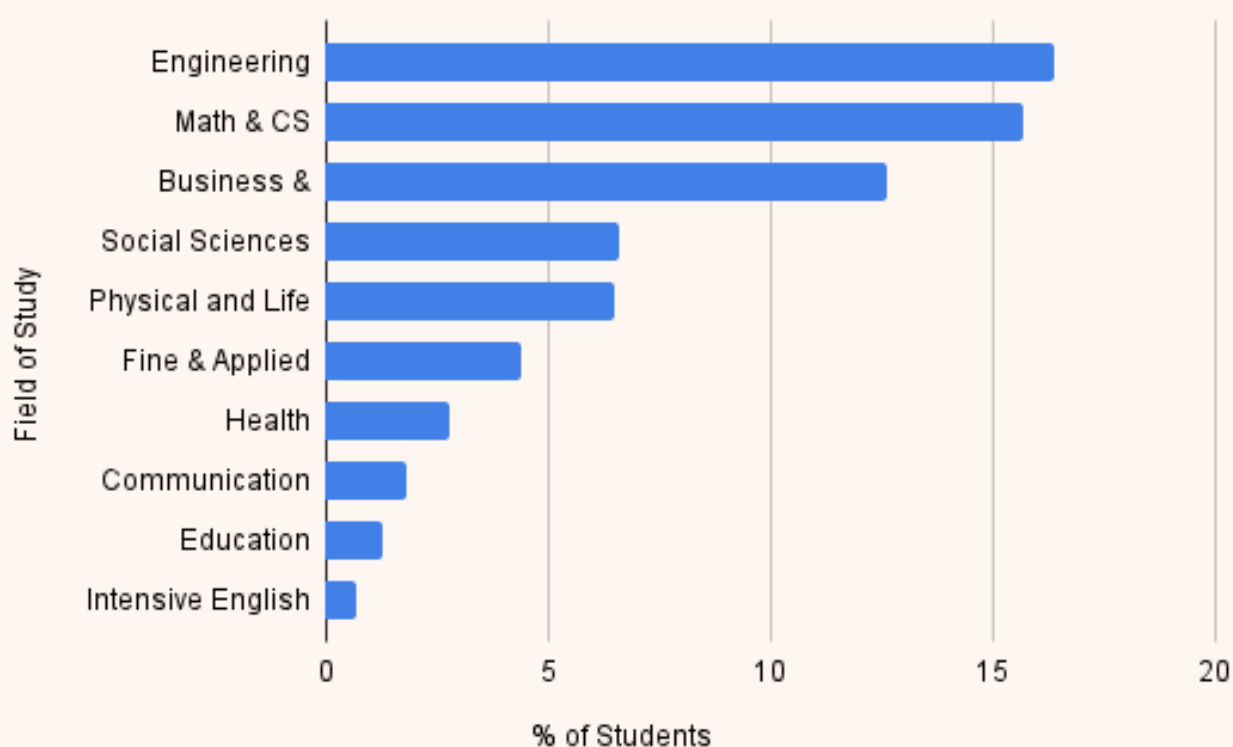


Figure 13: Outbound Students from India: By Stream (2010-11 to 2021-22)

6.3 International Student Mobility: Overall Trend Analysis of India

India's international student mobility trends between 2016 and 2022 reveal an increasingly outward-bound trajectory, with outbound student numbers significantly outpacing inbound flows. This pattern underscores India's growing footprint in global higher education markets while also indicating challenges in attracting international students domestically. Table 13 provides insights into annual trends, net outflows and fluctuations in the balance of mobility, reflecting both global disruptions and domestic policy responses.

Table 13: International Student Mobility of India (2016-2022)

Year	Inbound (i)	Outbound (o)	i:o Ratio ⁵	Net Outflow ⁶
2016	45,424	6,84,823	1:15	6,39,399
2017	47,575	8,06,326	1:17	7,58,751
2018	46,144	6,20,156	1:13	5,74,012
2019	47,427	6,75,541	1:14	6,28,114
2020	49,348	6,85,097	1:14	6,35,749
2021	48,035	11,58,702	1:24	11,10,667
2022	46,878	9,07,404	1:19	8,60,526

Source: AISHE Report 2016-17 to 2021-22; Ministry of External Affairs

Note: The data reflects stock figures over the specified time period



Figure 14: International Student Mobility of India (2016-2022)

⁵ Calculation: Inbound to Outbound Ratio = $i \div o$, where i = inbound mobility of students to India, and o = outbound mobility of students from India in a given year

⁶ Calculation: Net Outflow (n) = $o - i$, where i = inbound mobility of students to India, and o = outbound mobility of students from India in a given year

Figure 14 depicts India's international student mobility from 2016 to 2022, revealing a clear divergence between inbound and outbound trends. The number of international students coming into India remained relatively stable from 45,424 in 2016 to 46,878 in 2022, indicating a stagnant growth trajectory in attracting international students. In contrast, the number of Indian students going abroad for higher education displayed significant variation and overall growth from 6.84 lakh in 2016 to 11.58 lakh in 2021. The trend indicates a strong and increasing demand among Indian students for international higher education opportunities.

The imbalance between inbound and outbound mobility is clearly reflected in the i:o ratio. In 2016, for every international student coming to India, 15 Indian students went abroad. This imbalance intensified over time, peaking at a ratio of 1:24 in 2021. Although the ratio slightly narrowed to 1:19 in 2022, it still underlines a significant outflow of students with minimal corresponding inflow. The persistent skew in the ratio points to challenges in India's ability to retain and attract international talent. The net outflow of students i.e. difference between outbound and inbound mobility mirrors the trends in the i:o ratio. It increased from approximately 6.39 lakh in 2016 to over 11.10 lakh in 2021, before declining to 8.60 lakh in 2022.

7. Key Findings

The internationalisation of higher education has witnessed substantial changes globally and within India over the last two decades. The patterns of international student mobility explored in this paper reflect the evolving aspirations of students, strategic priorities of nations and growing interdependence of the global higher education system. The global overview of international student mobility shows a 214% increase in the number of mobile students over the last 25 years, rising from 22 lakh in 2001 to 69 lakh in 2022. While the COVID-19 pandemic temporarily slowed this growth, numbers rebounded strongly by 2022, reflecting resilience and continued appeal of cross-border higher education.

An analysis of top host countries reveals sustained leadership by USA, UK and Canada, with Canada showing the most rapid recent growth due to favourable immigration and work policies. Countries like Germany, France and Australia recorded steady increases, while others such as South Korea and Spain are emerging destinations. Top source countries have also shifted, with India overtaking China as the largest sender of international students by 2024. The global spread of outbound students is diversifying, though English-speaking countries continue to dominate as destinations.

For India, the inbound mobility remains modest while the outbound mobility has surged with India being the world's leading source country for international students. India's inbound international student trends show an increase in total numbers from 6,896 in 2000–01 to 49,348 in 2019–20, followed by a slight decline in the subsequent years due to the pandemic. South Asian and African nations continue to be the main contributors. State-wise data reveals a decline in international student numbers in traditional hubs like Karnataka and Tamil Nadu, while Punjab, Uttar Pradesh and Gujarat have seen growth. Stream-wise analysis indicates continuing interest in Engineering and Business programmes, but also a rise in applied and non-conventional fields like pharmacy, computer applications, and niche programmes.

India's outbound student mobility displays strong growth from 6.8 lakhs in 2016 to 13.35 lakhs in 2024, despite fluctuations due to the pandemic. USA, Canada, UK and Australia remain top destinations, with UK and Canada seeing significant increases in Indian enrolments. State-wise outbound trends identify Andhra Pradesh, Punjab and Maharashtra as leading contributors. At the disciplinary level, there is a decline in Engineering and Business, and rising interest in Social Sciences, Arts and interdisciplinary

fields. The combined trend analysis reveals a consistent imbalance between inbound and outbound mobility. In 2022, for every 1 international students coming to India, 19 Indian students went abroad, highlighting the need for a more balanced and strategic internationalisation approach at the systemic and institutional levels.

8. Way Forward

The world is currently witnessing a reverse brain drain globally. Due to domestic policies and funding cuts in leading host countries of international students such as the USA, scholars and scientists are seeking opportunities in other parts of the world. Other countries are seizing the moment by introducing new policies to attract World Class Talent. European nations have acted as first responders by introducing timely talent attraction policies to attract talent. For e.g., France has promptly introduced the “Choose France for Science” initiative, and the Netherlands has established targeted funds to recruit foreign researchers. These programmes reflect a broader international strategy by several countries to capitalize on the tectonic and geopolitical shifts of America’s retreat from leadership in science and innovation.

To capitalise on these geopolitical opportunities and for addressing the significant imbalance between outbound and inbound student mobility and the rising forex burden, the following evidence-based strategies have been proposed for making India an emerging global destination for higher education:

8.1 Set Student Mobility Targets

The inbound-to-outbound (i:o) student ratio may be improved from the current level of approximately 1:19 (as of 2022) to 1:10 by 2030. This target may be integrated into national higher education and internationalisation strategies, including NEP 2020 implementation plans. Additionally, targets to increase international student enrolment to at least 1.5 lakh by 2030 would be helpful. This could be achieved by focusing on key source regions such as Southeast, Central and West Asia, Anglophone Africa, Europe and Oceania. Annual growth targets of 10% for high potential States and 5% for INIs (top 100 NIRF) to increase international student enrolment may be provided.

8.2 Promote Reciprocal Student Mobility

Bilateral Agreements that include provisions for reciprocal student exchange quotas with at least 15 countries may be initiated by 2027. Additionally, internationally benchmarked academic programmes may be introduced across Leading Indian HEIs, particularly in fields that drive high outbound mobility such as STEM courses. The Top 100 Indian HEIs may be encouraged to institutionalise two-way exchange programmes with global universities through joint, dual and twinning degree programmes by 2030 so that Indian students desirous of global exposure can gain immersive experience in other geographies for at least a semester/term. Aligning course content with global standards through international accreditations and faculty collaboration with foreign institutions may be encouraged to achieve this. India may also launch a prestigious international fellowship programme modelled after global benchmarks. This fellowship would enable inward and outward student researcher mobility at entry and mid-career levels, collaborative research projects, and short- and long-term visiting scholar programmes at global partner universities. It would also attract high quality talent and strengthen academic diplomacy.

8.3 Create customised Branding, Communication and Outreach (BCO) strategies

A comprehensive communication, branding and outreach strategy is a sine qua non for establishing India as a leading hub for higher education. This strategy should play multiple roles. Firstly, country-specific needs and preferences of students may be studied to design customised BCO plans for different geographies—Europe and the Americas, East, Central and West Asia, Anglophone Africa, reflecting region-specific interests and student migration trends. The current focus is primarily on African nations. However, market research may inform these strategies. Secondly, India's strengths in affordable education, interdisciplinary curricula, cultural diversity, innovation and entrepreneurship potential, low-cost high-impact research experience, and its distinctive value proposition may be communicated to foreign academic institutions, professors, researchers, and students. Thirdly, a systematic brand building campaign about Indian HEIs and alumni that have made a mark on international platforms may be undertaken using ICT and social media. This could showcase the achievements of eminent alumni of Indian HEIs and thereby highlight the innate potential of Indian HEIs. Fourthly and most importantly, it must convey the massive transformation in India in terms of access to infrastructure, connectivity, digitalisation and good quality of life. These are factors often not communicated or miscommunicated by the international media and play a vital role in enabling students to take decisions about international education, in addition to the quality of the HEIs. Local languages of the target nation may be extensively used during the communication and outreach processes.

8.4 Strengthen Institutional Capacity through International Alumni Collaboration

A key challenge for many Indian HEIs is developing strategies to deliver quality programmes consistently and at scale. To address this, creation of a network of leading alumni of prestigious Indian HEIs that have excelled in their spheres and sectors can be immensely helpful. These experts would have the dual advantage of the firsthand experience of their Alma Mater's strengths and limitations and the global expectations from higher education. They could share practical knowledge with their Indian Alma Maters on various aspects institutional capacity that would help them attract international students. Additionally, they could act as ambassadors of Indian HEIs in their respective countries and also be used by Indian Embassies and Missions in their BCO endeavours.

8.5 Build Regional Networks in STEAM3 Areas

Establish networks with universities in Asia and Anglophone Africa, particularly in STEAM3 courses i.e. Science, Technology, Engineering, Arts, Mathematics, Management, and Medicine. Creating specialised consortia of Indian universities in these disciplines would facilitate greater exchange of research and pedagogical ideas and innovations. A focused effort, led by prominent Indian HEIs, could significantly bolster the prospects of India's regional academic partnerships.

8.6 Promote Exposure to India's low-cost high impact R&D and Innovation Ecosystem

Indian R&D Centres have made a mark in terms of pursuing cutting-edge research of the highest quality at the lowest cost. ISRO's success with Missions Chandrayaan and Mangalyaan have established India as a leading player in space tech research. Similarly, India has achieved success in as diverse areas as health tech, fintech, biotech and agri tech. Drawing from India's success in technological and process innovation and scaling cost-efficient solutions, would benefit international students from developing economies, especially those from the Global South. The development challenges

of the coming decades—climate technology, sustainability and renewable energy, and adaptation to frontier technologies—require urgent solutions. Top Indian HEIs like the IITs, NITs and IIITs are well-positioned to lead research programmes in these areas, attracting students and researchers from the Global South.

8.7 Leverage Immersive Experience in India's Start-up Ecosystem

India has emerged as the third largest startup ecosystem in the world with nearly 1.6 lakh startups and over 120 unicorns. Many of these have either been a product of the incubator ecosystem within Indian HEIs including several IITs, IIMs and Central Universities or founded by alumni of these HEIs. This ecosystem provides a unique opportunity to international students to gain an immersive experience and understand how a high potential startup ecosystem operates. It would also help them work with the best minds from academia and industry and develop scalable solutions addressing challenges faced by their home countries in a variety of areas such as improving agricultural supply chains, providing affordable healthcare, expanding financial inclusion to underserved communities, among others.

8.8 Integrate Industry and Rural Internship Experience with all Programmes

Studying in India can provide valuable internship opportunities to international students and gain exposure to consumer behaviour, complex supply chains and people diversity in one of the world's largest markets. Top global universities teach courses on Indian companies and Indian economy in their undergraduate and postgraduate programmes. Hence, studying in India and gaining firsthand experience in India can be a distinctive advantage for international students to get jobs in MNCs. Additionally, rural immersion opportunities can help international students gain exposure to impactful innovations that have contributed to an inclusive and sustainable developmental model through last mile service delivery in a variety of sectors leading to improvement in the quality of life of people in Rural India. The population of Rural India is equal to the population of Continental Europe. Hence, exposure to local governance and socioeconomic transformation in a complex demographic and geographic system can be an insightful experience for city-bred international students. Rural internships can help them replicate ideas in their home countries that have similar socioeconomic profile. Hence all undergraduate and postgraduate programmes for international students must have mandatory industry and rural internships as part of their curriculum.

8.9 Create Extended Stipend-based Internships

Post-education employment opportunities play a pivotal role in influencing students' choice of destinations to study abroad. Hence, introducing extended stipend-based internships for a duration of 2 years for the top 10% of international students graduating from leading Indian HEIs can be considered. Specialised education-linked visa categories with streamlined processes may be developed for international students and scholars graduating from prestigious Indian HEIs in cutting edge areas such as frontier technologies, climate change and energy transition, innovation and entrepreneurship, and humanities to provide them with an opportunity to contribute to the growth of the Indian economy. This could also include international student entrepreneurs studying in Indian HEIs and willing to establish their start-ups in the Indian geography. This would not only attract greater foreign investments in the Indian economy but also create livelihoods within the country.

8.10 Create a Conducive Culture on Campuses of Leading Indian HEIs

To attract international students to Leading Indian HEIs and help them gradually assimilate into campus culture, two major changes may be considered. Firstly, creating hard infrastructure that

meets the standards and requirements of international students. This includes housing, catering, and other facilities that are of an international standard. For this relevant structures and processes may be designed, and investments made. Secondly, creating an encouraging environment and an open work culture that encourages Indian students and faculty to proactively engage with international students and be empathetic towards their approaches to life and living. For this developing multicultural competence among Indian students, faculty and staff is important. On-campus counselling and mentorship facilities for international students can also play a major role.

8.11 Develop a Mobility Dashboard and Publish Annual Mobility Scorecard

A National Student Mobility Dashboard may be developed to publish data on international student mobility (inbound/outbound), annual i:o ratios, mobility by State, discipline, and destination/origin country supporting evidence-based policy modifications and institutional benchmarking. A Mobility Scorecard every year summarising international student mobility trends may be published.

8.12 Ease of Regulation

Administrative procedures need to be streamlined to enable seamless movement of students and researchers across borders. This includes simplifying visa processes, reducing documentation burdens, and addressing regulatory bottlenecks that impede international academic and research collaborations and student mobility.

9. Conclusion

In a world reshaped by post-pandemic realities and geopolitical flux, internationalisation should be pursued not as a symbolic aspiration but as a strategic imperative: one that fosters academic excellence, global citizenship and resilient knowledge economies. Internationalisation, when pursued as a means rather than an end, offers a powerful tool to elevate academic quality, promote cross-cultural understanding and build global networks of knowledge exchange. As countries recalibrate their higher education policies in a post-pandemic world marked by geopolitical shifts and digital transformation, fostering a balanced, inclusive and purposeful internationalisation agenda will be key to ensuring long-term academic excellence and mobility.

Building on this foundation, India's strategic emphasis on 'internationalisation at home' will be instrumental in realising the aspirations of *Viksit Bharat@2047*. By embedding global perspectives within domestic institutions and enabling internationalisation of higher education, India can equip itself with world ready human capital and become a leading hub for talent, innovation and knowledge. This approach will not only enhance the quality and relevance of Indian higher education but also ensure that its graduates are prepared to lead and collaborate by providing innovative solutions to global challenges. By nurturing a world class and globally reputed higher education ecosystem, India can emerge as a key contributor to shaping the future of higher education and research.

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