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MARKET BACKGROUND

Student Recruitment in the Western Balkans

Overview

▪ **A young recruitment market**. The four post-Yugoslav republics on the EBEUF tour have a combined population of around 7.16 million and sizeable youth cohorts. Kosovo stands out as the youngest market, with almost 45% of its population under 30. Tertiary attainment, at around 20% across the region, remains below the EU average of approximately 35%, but has risen dramatically over the past two decades [1] [2]. Drivers include economic growth and increasing demand for high-quality education among a globally oriented younger generation with strong English-language skills. As a result, university enrolment is now substantial relative to population size.

▪ **Capital-city concentration**. Skopje, Pristina, Podgorica and Sarajevo are the clear national recruitment hubs, with higher-education ecosystems heavily concentrated in the capitals, including in relatively decentralised Bosnia and Herzegovina (BiH).

▪ **Uneven academic preparation.** Secondary-school learning outcomes vary across the region, with Montenegro and BiH generally outperforming North Macedonia and Kosovo. This creates strong potential demand for Foundation Years and other academic transition pathways.

▪ **Affordability matters.** Given regional income levels, tuition fees and living costs abroad are important decision factors alongside academic reputation. Recruitment messaging should therefore place particular emphasis on scholarships, financial support and overall affordability.

Indicator	North Macedonia	Kosovo	Montenegro	Bosnia and Herzegovina
Population, 2025	1.82 mln	1.58 mln	0.62 mln	3.14 mln
GDP per capita (US$), 2025	10,490	7,899	14,817	10,382
Population under 30, 2025	34%	45%	36%	29%
Upper secondary enrolment count, 2025-26	67,540	62,085	27,004	108,413
PISA reading (points)	359	342	405	403
PISA maths (points)	389	355	406	406

Sources: World Bank, *World Development Indicators,* 2026; UN, *World Population Prospects,* 2024; National Statistical Agencies, 2025/2026; OECD, *Programme for International Student Assessment (PISA)*, 2022 (2018 for BiH).

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Student Mobility

▪ **High outbound mobility.** Outbound study is substantial relative to market size, reflecting the region's strong international orientation and established migration links with Europe. UNESCO estimates based on host-country reporting indicate approximately 15,400 tertiary students abroad from Bosnia and Herzegovina, 5,500 from North Macedonia and 5,100 from Montenegro [3]. Montenegro stands out as particularly outward-oriented given the small size of its population and upper-secondary cohort.

▪ **Institutional supports.** Erasmus+ has further institutionalised EU-bound mobility across the region. North Macedonia is fully associated with the programme, while Kosovo, Montenegro and BiH participate as non-associated partner countries. Montenegro's progress towards EU membership, with accession targeted for 2028, could further stimulate outbound mobility from this country. North Macedonia and BiH remain EU candidate countries, while Kosovo is currently a "potential candidate".

Destinations

▪ **Europe dominates.** Student mobility is strongly European and regionally concentrated. Destinations with established diaspora communities—particularly Germany, Austria and Switzerland, as well as the Nordic countries, Italy and France—attract students from all four markets.

▪ **Regional links remain strong.** Slovenia, Croatia and Serbia are important study destinations, particularly for students from Montenegro and BiH, supported by linguistic and cultural ties, geographic proximity and relatively affordable costs. Türkiye is also a significant destination, especially for students from BiH and North Macedonia.

▪ **Choice diversification.** A recent trend is the growing interest in emerging study destinations, including North-Eastern and Central Europe and Cyprus. Younger students are increasingly looking beyond traditional hubs, combining affordability considerations with a desire for new experiences and a broader range of study, career and lifestyle options.

Fields and Levels of Study

▪ **Business-related fields are in high demand.** In Kosovo, "Business, Administration and Law" was the most popular field among new bachelor's students in 2023/24, accounting for 4,380 enrolments, or 26% of first-time students [4]. Demand is also increasingly oriented towards programmes with clear labour-market and technical relevance, creating strong opportunities for interdisciplinary degrees such as business analytics, fintech, digital business, economics and data science, and quantitative management.

▪ **Undergraduate is the core opportunity.** The region is primarily an undergraduate recruitment market, with a meaningful postgraduate segment. Career outcomes play a central role in study and migration decisions, increasing the appeal of programmes that offer internships, strong employer links, quantitative or digital content, and predictable post-graduation pathways.

References

[1] European Training Foundation, *Country Fiche* reports, various countries, 2024

[2] https://ec.europa.eu/eurostat/statistics-explained/SEPDF/cache/32198.pdf

[3] UNESCO, *Outbound Internationally Mobile Tertiary Students,* UIS estimate, 2022

[4] Kosovo Agency of Statistics, *Higher Education Statistics by Field of Study,* 2023-24

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