



Global Guide 2018



2018 GLOBAL GUIDE

The Global Guide is a publication of the U.S. Department of State's EducationUSA Global Advising Network, produced by the Department's Bureau of Educational and Cultural Affairs and the Institute of International Education (IIE) under a cooperative agreement. Unless otherwise noted, student mobility statistics are drawn from the 2017 *Open Doors* Report on International Educational Exchange, produced by IIE and sponsored by the U.S. Department of State.

CONTENTS

Introduction to EducationUSA	2
Services for U.S. Higher Education Institutions	4
EducationUSA: By the Numbers.....	6
Regional Educational Advising Coordinator (REAC) Map	6
EducationUSA Advising Center Map.....	8
EducationUSA Advising Center Levels of Service	10
Social Media.....	11
EducationUSA Regional Reach Chart	12
Sub-Saharan Africa	14
East Asia and Pacific.....	22
Europe and Eurasia	31
Middle East and North Africa.....	44
South and Central Asia	54
Western Hemisphere	64



Introduction to EducationUSA

Mission and Structure: EducationUSA is the U.S. Department of State's global network of international student advising centers located in nearly every country of the world. The Department's Bureau of Educational and Cultural Affairs (ECA) oversees the program as part of its mission to build mutual understanding among the people of the United States and the people of other countries. EducationUSA promotes U.S. higher education to students around the world by offering accurate, comprehensive, and current information about opportunities to study at accredited colleges and universities in the United States. It also provides services to the U.S. higher education community to help meet recruitment and campus internationalization goals. EducationUSA centers are located at U.S. embassies and consulates, Fulbright Commissions, bi-national cultural centers, non-governmental organizations, and foreign universities and libraries.

Regional Educational Advising Coordinators

Regional Educational Advising Coordinators (REACs) guide and support advisers in the EducationUSA network, which is organized into six geographic regions: East Asia and Pacific, Europe and Eurasia, Middle East and North Africa, South and Central Asia, Sub-Saharan Africa, and the Western Hemisphere. REACs provide training and guidance to advisers to enable them to maintain and improve the quality of their work, and assist in ensuring the smooth functioning of advising centers. REACs also serve as resources for the U.S. higher education community on local educational systems and the development of strategies for increasing international student mobility.

Programs and Services

EducationUSA advising centers offer a variety of services to assist both international students and the U.S. higher education community. For international students, advising centers provide information about the breadth of U.S. higher education as well as the application process through group advising sessions, virtual advising, individual appointments, and pre-departure orientations. Basic services for students are free of charge. The U.S. higher education community looks to the EducationUSA network for

advice about developing regional and country-specific recruitment strategies, creating programs and products to connect with student audiences abroad, and obtaining information about how application and admission issues affect overseas candidates. EducationUSA advisers also use their expertise to help U.S. institutions develop relationships with local universities and schools for recruitment, study abroad programs, and deeper university partnerships.

Opportunity Funds Program

In line with U.S. Department of State public diplomacy goals, EducationUSA advisers reach out to students from economically disadvantaged backgrounds. The EducationUSA Opportunity Funds program assists high-achieving students who are competitive for full financial aid from U.S. colleges and universities but lack financial resources to cover upfront costs such as testing fees, application fees, or airfare. Opportunity Funds program students engage in one to two years of cohort advising sessions with EducationUSA advising staff, ultimately helping to diversify the pool of students applying to U.S. colleges and universities. Hundreds of academically talented students from more than 50 countries worldwide participate in the Opportunity Funds

program each year and receive millions of dollars in scholarship offers from U.S. higher education institutions (HEIs). For more information about recruiting and supporting Opportunity Funds students, please contact: edusaopportunity@state.gov.

Your 5 Steps to U.S. Study

One of EducationUSA's principal resources, *Your 5 Steps to U.S. Study* guides international students through the application and admission processes for undergraduate, graduate, and English-language programs, as well as for short-term educational opportunities at U.S. colleges and universities. The steps give students a timeline and practical tips to navigate the American higher education sector. *Your 5 Steps to U.S. Study* is available online at www.educationusa.state.gov.

U.S. Study Abroad

EducationUSA advisers around the world are experts on the national education systems in their respective countries and have good relationships with local universities and schools. For U.S. HEIs seeking to establish or expand study abroad programs, both the EducationUSA network and the U.S. Department of State's U.S. Study Abroad Branch can provide support. Visit the U.S. Study Abroad website at www.studyabroad.state.gov.



5.1 million+

Social Media “likes”

10,500+

Subscribers to the Higher
Education eNewsletter

5.8 million+

2017 Website Unique Visitors

Services for U.S. Higher Education Institutions

The U.S. Department of State promotes the United States as the leading higher education destination for students around the world. International students enrich U.S. classrooms, campuses, and communities with unique perspectives and experiences that expand American students' horizons. They also enhance U.S. institutions' research and teaching capacity and increase their prestige and position in the competition for global talent. The knowledge and skills students develop on an internationalized American campus prepare them to become the next generation of world leaders who work across languages, cultures, and borders to solve shared global challenges.

International students and their families also benefit the U.S. economy. The U.S. Department of Commerce estimates that international students contributed more than \$42.4 billion to the U.S. economy in 2017 through their spending on tuition, room and board, and living expenses, making U.S. higher education one of America's leading service export industries. NAFSA's *International Student Economic Value Tool* provides a state-by-state and congressional district-based analysis of international students' economic contributions to the U.S. economy.

Research

The U.S. Department of State funds the Institute of International Education's *Open Doors Report on International Educational Exchange*, an annual survey of international students and scholars in the United States and of U.S. students studying abroad in credit-bearing courses. *Open Doors* data is used by U.S. embassies; the U.S. Departments of State, Commerce, and Education; and other federal, state, and local organizations to inform policy decisions about educational exchanges, trade in educational services, and study abroad activity. U.S. colleges and universities, foreign governments, and the media rely on these comparative statistics to analyze trends in student mobility.

The report also provides data on places of origin, sources of financial support, fields of study, host institutions, academic level, and rates of growth of the international student population in the United States. Furthermore, it highlights the positive economic impact of international students for the states in which they study and the nation as a whole. The publication also includes sections on international scholars in the United States and intensive English-language programs.

Work with EducationUSA Advisers and REACs

The U.S. higher education community can connect with EducationUSA advisers and REACs in the United States as well as abroad. Ideas on how institutions can engage include:

- Join U.S. higher education professionals, REACs, and advisers from key overseas markets at the annual EducationUSA Forum in Washington, DC.
- Participate in EducationUSA regional forums held overseas to convene representatives of the U.S. higher education community and members of the EducationUSA advising network as they examine regional recruitment strategies and explore opportunities for collaboration.

- Host EducationUSA advisers for visits and training programs on your campus. Ensuring that advisers have access to current information and skills-based training is essential to the success of the EducationUSA network. The following opportunities are available:

- **EducationUSA Adviser Training Institute:** Each two-week EducationUSA Adviser Training Institute is composed of a Washington, DC-based workshop, with sessions at the U.S. Department of State and campus-based training. Further information, including the application to host on-campus training for EducationUSA advisers, is available at www.educationusa.state.gov.
- **Campus visits/higher education association conferences:** Experienced advisers represent EducationUSA at a variety of U.S. higher education association conferences each year. During their time in the United States, advisers have the opportunity to visit colleges and universities. Calls for campus hosts are publicized on the EducationUSA website and in the monthly newsletter.
- **Offer to serve as a subject matter expert in EducationUSA adviser training programs.**

- Direct students accepted to study at U.S. higher education institutions to EducationUSA pre-departure orientations in their home countries.

- Host a cohort of the EducationUSA Academy for international students from 15 to 17 years of age or link to an existing Academy program nearby by supporting a visit to a specific U.S. higher education institution. Academy participants explore specialized college preparatory content, attend writing workshops, develop their English language and writing skills, become familiar with the American higher education system, and prepare to apply to U.S. colleges and universities.

Global Recruiting Strategies

The EducationUSA network provides advice about developing regional and country-specific recruitment strategies. Institutions can collaborate with EducationUSA to enhance these strategies in a wide variety of ways:

- Consult REACs, the first point of contact for advice regarding a specific region or country.
- Ask REACs about connecting with education ministries and scholarship-granting bodies in the region.
- Encourage prospective students to connect with EducationUSA advisers

early in the college search and application process for guidance and to ensure they receive accurate information.

- Demystify the U.S. application and admissions process by directing international students to *Your 5 Steps to U.S. Study* at www.educationusa.state.gov.
- Conduct market research to identify audiences of prospective students in regions or countries that fit your institution's recruitment priorities. In addition to the regional information contained in this guide, take advantage of the *Open Doors Report on International Educational Exchange*, and the EducationUSA center and country fact sheets available on the EducationUSA website.
- Visit EducationUSA advising centers to engage student audiences and gain exposure for your school or program. REACs and advisers can help you make the most of your international recruiting trips. Contact local centers in advance to arrange meetings or school visits, schedule presentations with students, or attend a college fair.
- Encourage international alumni to get involved with EducationUSA advising centers. Word of mouth is an important factor in building institutional name

recognition overseas, and alumni can be excellent ambassadors. EducationUSA advisers can assist in setting up alumni presentations.

- Leverage state and regional consortia relationships with the EducationUSA network to promote an institution to students abroad. EducationUSA works with 30 state and regional consortia that promote U.S. cities, states, and regions as destinations for international students.

Increase Reach

In addition to resources such as PowerPoint presentations and country reports, EducationUSA offers an array of services for U.S. higher education including:

- Enabling U.S. higher education professionals to access the EducationUSA network of advisers and REACs
- Connecting with Washington, DC-based EducationUSA staff and embassy representatives
- Participating in EducationUSA Interactive webinars as content experts
- Subscribing to the *U.S. Higher Education Monthly Update*
- Scheduling structured visits to EducationUSA centers
- Accessing special programming, regional fairs, and other events
- Providing social media platforms that help schools engage prospective international students

Login Access

The U.S. higher education section of the EducationUSA website helps institutions develop and refine their international student recruitment strategies. Free logins are available to employees of U.S. postsecondary institutions accredited by bodies recognized by the U.S. Department of Education as well as higher education professional membership associations. A higher education professional login enables users to access information that can be found only at www.educationusa.state.gov.



EducationUSA

By the Numbers

EducationUSA collects statistics to measure outreach to prospective students through center-based and outreach activities, and virtual and social media platform.

Number of In-Center Contacts, by Type

Individual advising appointments	100,506
Advising by phone or SMS (each conversation)	229,653
Advising by email	448,774
Group advising attendees	183,637
Walk-ins/library/computer users	456,918
U.S. institution representatives	10,776
MOOC Camp Attendees	3,599

Total 1,433,863

Number of Event Attendees, by Outreach Activity

Education fairs	574,171
American Corners/Centers	79,093
Local universities/secondary schools	369,859
Other fairs/conferences/seminars	173,626
Host government events	17,479
Embassy/consulate events	26,736
Public locations	27,150
Other activities	39,975

Total 1,308,089

Number of Virtual/Social Media Contacts, by Type

Social networks - page likes	4,782,285
Instagram followers	68,844
Videos/ video channels views	931,801
Skype contacts & IM advising calls	13,419
Blog follows	149,854
Twitter/microblog follows	826,876
Digital Video Conference (DVC) participants	2,680
EducationUSA webinar participants	13,450
EducationUSA Interactive Sessions	4,490
Virtual fairs - EdUSA booth & session visitors	32,946

Total 6,826,645

Unique website visitors (Center and flagship websites)

Total 5,802,463

Total 15,371,060

**Changes in classification and methodology have resulted in variances that should not be interpreted as trends over time in specific categories.*

Regional EducationUSA Advising Coordinator (REAC) Map





EducationUSA Worldwide Advising Centers

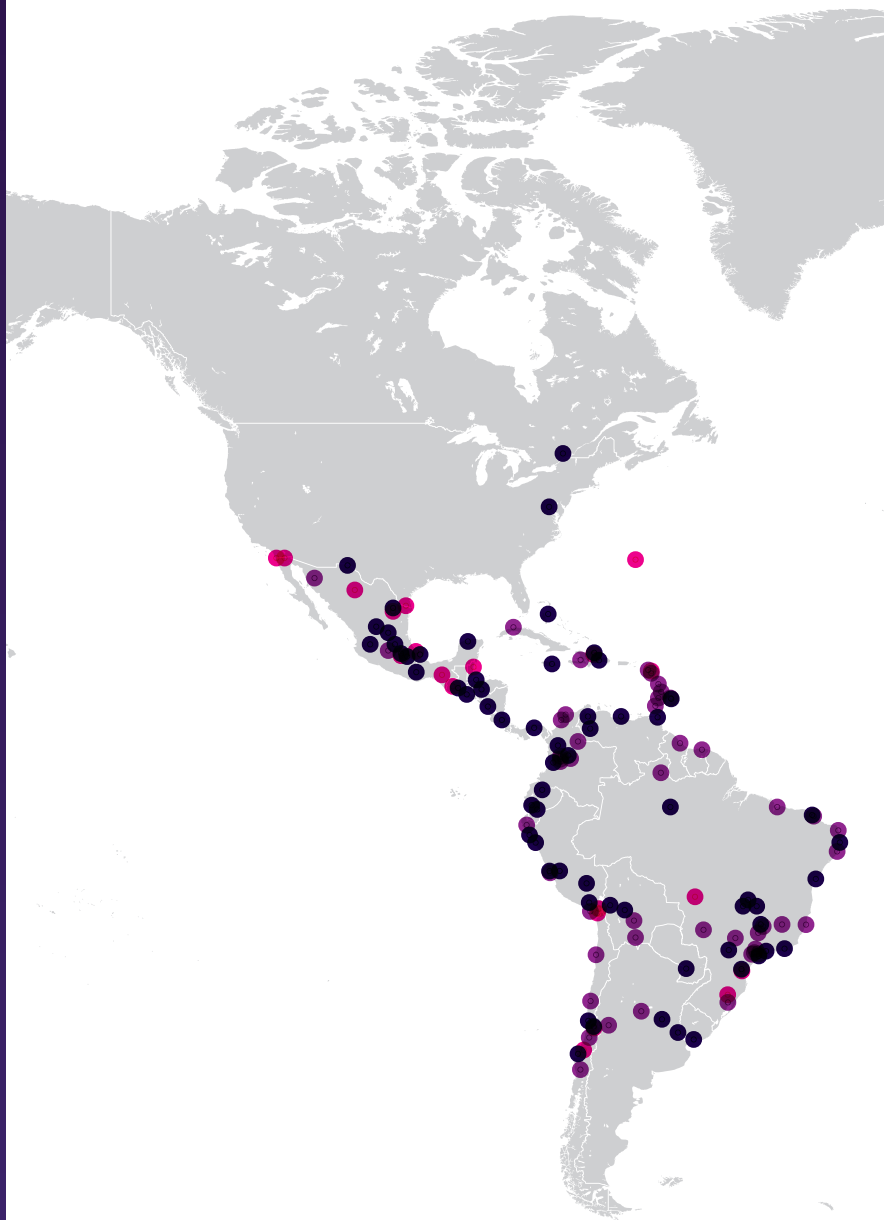
Levels of Service: Advising centers in the EducationUSA network offer one of three levels of service: Comprehensive, Standard, or Reference. To find an advising center, visit www.educationusa.state.gov/find-advising-center.

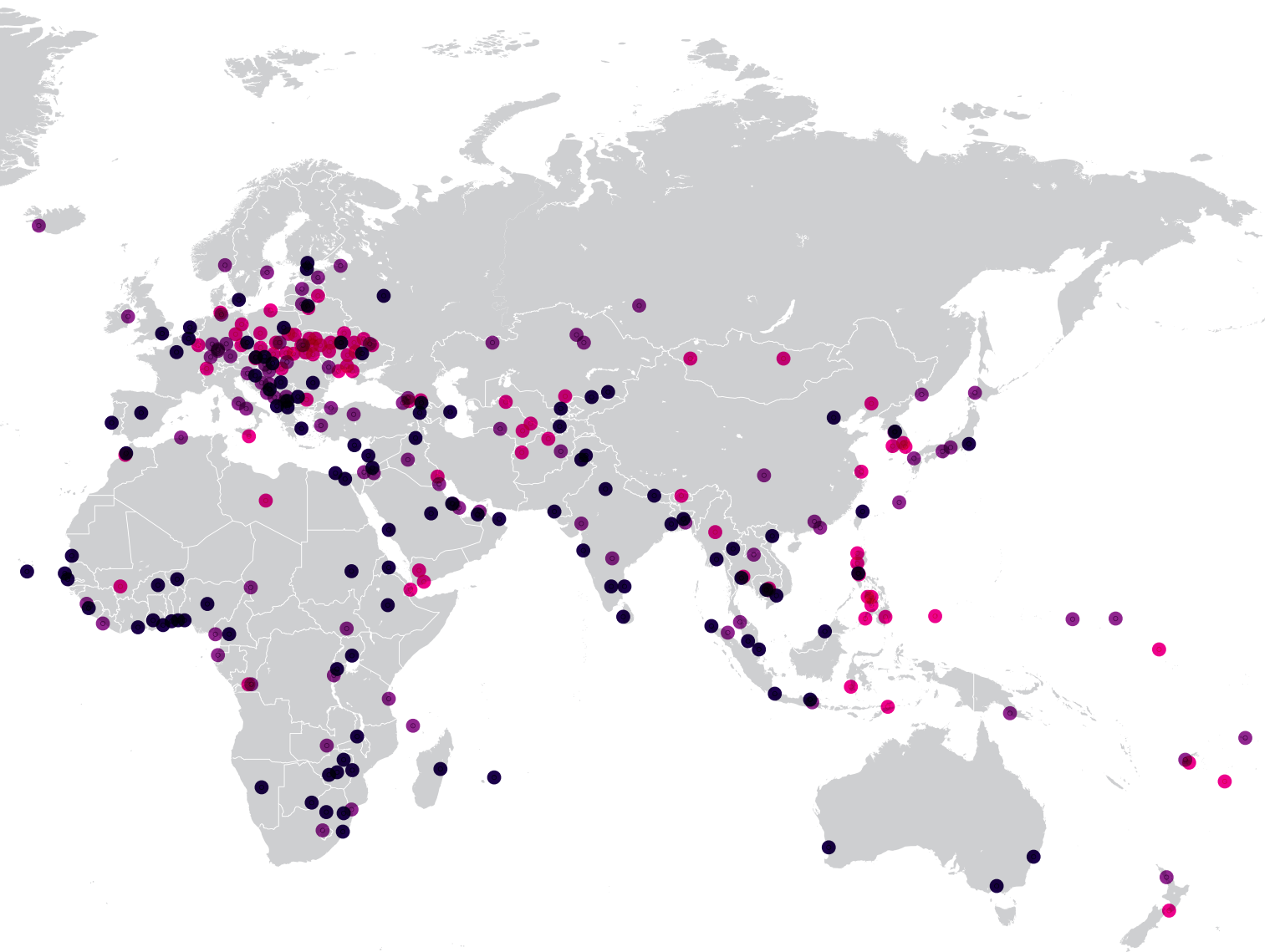
Types of Center (By color)

Reference Centers

Comprehensive Centers

Standard Centers





EducationUSA Advising Centers

Comprehensive

- Adheres to the EducationUSA Principles of Good Practice, which can be found at www.educationusa.state.gov/principles-good-practice
- Maintains an up-to-date library of reference books/materials
- Offers individual and group advising, information on financial aid, and pre-departure orientations/information
- Employs advising staff with college degrees (U.S. Bachelor's degree or equivalent) who are proficient in spoken and written English
- Provides virtual advising and consulting including through email, web, social media, and instant messaging
- Maintains computers with internet access for visitors
- Organizes and participates in alumni group activities and college fairs, hosting the EducationUSA booth
- Maintains relationships with local high school counselors and university administrators, and conducts outreach to local high schools and higher education institutions
- Provides briefings on the local education system for visiting U.S. representatives
- Describes and compares U.S. and host country educational systems
- Verifies Ministry of Education recognition/certification of local high schools and universities

- Facilitates communication with local secondary and tertiary institutions for visiting U.S. representatives
- Organizes public presentations at off-site locations for visiting U.S. representatives
- Hosts visiting U.S. representatives for thematic presentations on U.S. higher education
- Organizes general U.S. higher education orientation sessions, often featuring visiting U.S. school representatives
- Provides information on local government and foundation scholarships as well as other financial aid
- Displays college- and university-provided materials

Standard

- Adheres to the EducationUSA Principles of Good Practice, which can be found at www.educationusa.state.gov/principles-good-practice
- Maintains an up-to-date library of reference books/materials
- Employs, at minimum, one adviser, and offers hours sufficient to meet local demand at standard service level
- Employs advising staff proficient in spoken and written English
- Offers individual advising
- Provides information on financial aid

- Describes and compares U.S. and host country educational systems
- Maintains relationships with local high school counselors and university administrators
- Displays U.S. college- and university-provided materials
- Provides access to internet-based video conferencing equipment
- Offers pre-departure information/orientations
- Participates in college fairs, hosting the EducationUSA booth
- Provides briefings on the local education system for visiting U.S. representatives
- Verifies Ministry of Education recognition/certification of local high schools and universities
- Organizes general U.S. higher education orientation sessions, often featuring visiting U.S. school representatives

Reference

- Adheres to the EducationUSA Principles of Good Practice, which can be found at www.educationusa.state.gov/principles-good-practice
- Maintains an up-to-date library of reference books/materials
- Employs no adviser or offers only minimal personal assistance to students

Social Media

Social media and other virtual communication tools that link the EducationUSA network to students and to U.S. higher education institutions are critical to EducationUSA's goal of promoting U.S. higher education abroad.

Trends

Facebook, Twitter, and YouTube remain the dominant social media platforms for EducationUSA, where available. The flagship EducationUSA Facebook page reached more than 325,000 "Likes" in 2017 while the flagship Twitter account had approximately 21,000 followers. Platforms and applications such as Instagram, Snapchat, and WhatsApp continued to gain in popularity and use across the network over the past year. EducationUSA expanded its use of Facebook Live as well as Google Hangouts to expand and enhance communication. EducationUSA advising centers have also embraced country-specific social media platforms to better engage with the students they serve. For example, while advisers in Russian-speaking countries reach students on Vkontakte, and advisers in China connect with students via the WeChat application and the micro-blogging site Sina Weibo, those in South Korea employ Kakao Talk and Naver. Where an in-person advising presence is not feasible, such as in Belarus, Iran, and Syria, EducationUSA advising centers operate exclusively on virtual platforms.

EducationUSA Interactive Webinars

The EducationUSA Interactive series, produced in collaboration with the U.S. Department of State's Bureau of International Information Programs, consists of live, studio-produced, video web chats featuring international students, U.S. higher education representatives, and other experts discussing timely themes such as American campus culture,

financing U.S. study, college and university admissions, and the U.S. visa process. Other topics have included Muslim student experiences, LGBTI campus communities, support for international students with disabilities, exploring community colleges, and a session on U.S. campus culture for Latin American students and their parents conducted in Spanish. The Interactives attract viewers from around the world who are able to pose questions and get answers in real-time. Previously Livestreamed on the EducationUSA website with an accompanying chatroom feature, the Interactives moved to the Facebook Live platform in late 2017. EducationUSA records the Interactives and later uploads them to YouTube where they can continue to be viewed in their entirety. In addition, EducationUSA edits individual questions and answers from the presentations into short, digestible clips of no more than one minute for quick and easy reference.

EducationUSA Virtual Fairs

EducationUSA continues to partner with CollegeWeekLive (CWL) on a virtual international student college fair during International Education Week. The November 2017 event attracted more than 9,000 individual attendees. Students from approximately 180 countries and territories interacted with EducationUSA advisers and representatives, resulting in almost 27,000 unique connections with U.S. institutions. EducationUSA also partnered with CWL on three additional global virtual fairs, attracting a total of approximately 33,000 attendees over the course of the year. At each virtual fair, EducationUSA staff

presented thematic sessions related to U.S. study. EducationUSA expects to continue its involvement in these fairs in the coming year as part of its public-private partnership with CWL.

EducationUSA Website

EducationUSA's mobile-friendly website, www.educationusa.state.gov, serves as the central information hub for the EducationUSA network, where international students and their parents can find reliable information about studying in the United States. Advisers regularly post information to the site about upcoming in-person and virtual events, making it the best place to find listings of EducationUSA events worldwide. In addition, social media posts from Facebook, Instagram, Google+, and Twitter that use the hashtag #EducationUSA are pulled onto the homepage, creating a more interactive and dynamic site. Furthermore, with links to social media on each page, users can share pertinent information about study in the United States with their own social network. The site also provides resources for U.S. higher education, as well as foreign institution and government users. Higher education professionals can request a login to access REAC contact information, and submit scholarship opportunities and news stories targeted to the international student audience for posting to the site. All users can now access student Mobility Facts and Figures sheets for 179 locations worldwide.



Facebook
Likes: 4.7 million+
Pages: 215



Twitter
Followers: 680,000+



Instagram
Followers: 68,000 +

EducationUSA Regional Reach

Contacts Made in 2017 by Region

Region	Sub-Saharan Africa	East Asia and Pacific	Europe and Eurasia	Middle East & North Africa	South & Central Asia	Western Hemisphere
Total contacts made through advising centers	324,556	106,370	226,940	70,887	288,361	416,749
Advising center-based contacts	323,217	104,136	224,468	70,301	287,681	413,284
U.S. institution representative contacts	1,339	2,234	2,472	586	680	3,465
Total contacts made through outreach activities	159,736	270,923	285,532	97,097	200,046	294,755
Education fairs	60,833	82,492	164,711	39,057	80,394	146,684
American Corners/Centers	17,498	29,054	8,658	3,788	10,126	9,969
Local universities/secondary schools	60,587	92,123	48,372	20,512	76,389	71,876
Other fairs/conferences/seminars	16,978	25,862	46,653	29,420	23,172	31,541
Host government events	430	11,039	368	2,481	305	2,856
Embassy/consulate events	1,010	1,654	9,656	1,137	1,063	12,216
Public locations	793	3,448	3,825	515	6,563	12,006
Other activities	1,607	25,251	3,289	187	2,034	7,607
Total contacts made through virtual platforms	1,348,216	1,569,457	1,014,580	851,054	1,067,044	573,579
Social media platforms	1,346,410	1,568,797	1,007,040	848,628	1,065,425	571,500
Webinars, DVCs	1,806	660	7,540	2,426	1,619	2,079
GRAND TOTAL	1,832,508	1,946,750	1,527,052	1,019,038	1,555,451	1,285,083

*Changes in classification and methodology have resulted in variances that should not be interpreted as trends over time in specific categories.



In the 2016-2017 academic year over one million students from around the world chose to study in the United States. The U.S. Departments of State and Commerce are committed to increasing this number, and to ensuring that the United States remains the top destination of choice for millions of globally mobile international students. The departments' activities complement one another, and they collaborate wherever possible including through joint presentations, participation in each other's events, and support for each other's activities around the world.

U.S. Commercial Service

Education service exports ranked 6th among service exports in 2017. International students studying in the United States contributed over \$43.1 billion* to the U.S. economy in tuition and living expenses during the 2017 calendar year, for a trade surplus of \$35.2 billion.

The U.S. Commercial Service is the trade promotion arm of the U.S. Department of Commerce's International Trade Administration. The U.S. Commercial Service has trade professionals located in over 100 U.S. cities, and in more than 75 countries at the U.S. embassies, consulates, and business centers dedicated to helping U.S. education services providers get started in exporting and developing partnerships in new global markets.

The U.S. Commercial Service and its Global Education Team assists U.S. educational institutions to build a recruitment pipeline and partnership channels through the various program offerings unique to the education sector. The U.S. Commercial Service provides counseling on market potential for programs and develops market research for the education industry. Programs offered include pre-scheduled meetings with potential partners, virtual events, trade missions, assistance at trade shows, and single school promotions. The U.S. Commercial Service also supports the U.S. educational state consortia across the United States with development, promotion, and strategic planning for international recruitment, and to highlight their states as study destinations.

To find out more about how the U.S. Commercial Service and its Global Education Team can help you achieve export success, please visit export.gov/industry/education.

export.gov/industry/education

*Preliminary education service export data issued by the U.S. Bureau of Economic Analysis, U.S. Department of Commerce. Data is revised annually during the month of June.



EducationUSA

EducationUSA is the U.S. Department of State's global network of more than 425 international student advising centers staffed by approximately 550 professionals in 180 countries worldwide. EducationUSA is the Department's official source of information on U.S. higher education and promotes the value of U.S. higher education to students, families, institutions, and governments abroad in an increasingly competitive global environment.

The EducationUSA network also provides strategic guidance on international student recruitment and campus internationalization to all accredited U.S. colleges and universities through a suite of basic services that are free of charge. EducationUSA advising centers are based at a wide variety of host institutions abroad such as U.S. embassies and consulates, Fulbright Commissions, bi-national centers, and local universities.

Advisers provide prospective international students with accurate, comprehensive, and current information about opportunities to study in the United States, application procedures, testing requirements, student visas, and financial aid. EducationUSA also funds the annual Open Doors report produced by the Institute of International Education (IIE), an annual census of international students and scholars in the United States and of U.S. students studying abroad.

EducationUSA's Opportunity Funds program assists highly qualified, economically disadvantaged students by covering the array of up-front costs associated with applying to and enrolling in U.S. colleges and universities.

educationusa.state.gov



Sub-Saharan Africa

Regional EducationUSA Profile

Angola, Benin, Botswana, Burkina Faso, Burundi, Cabo Verde, Cameroon, Central African Republic, Chad, Comoros, Republic of the Congo, Democratic Republic of the Congo, Côte d'Ivoire, Djibouti, Equatorial Guinea, Eritrea, Ethiopia, Gabon, The Gambia, Ghana, Guinea, Guinea-Bissau, Kenya, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mauritius, Mozambique, Namibia, Niger, Nigeria, Reunion, Rwanda, Sao Tome & Principe, Senegal, Seychelles, Sierra Leone, Somalia, South Africa, South Sudan, St. Helena, Sudan, Swaziland, Tanzania, Togo, Uganda, Zambia, Zimbabwe

51

EducationUSA Advising Centers in the Region

35 Comprehensive
13 Standard
3 Reference



¹ "Africa" in this section refers to the 51 countries of Sub-Saharan Africa

Sub-Saharan Africa has a growing EducationUSA presence with 51 EducationUSA advising centers in the region—35 comprehensive, 13 standard, and three reference—with 55 EducationUSA advisers carrying out a full range of activities. U.S. embassies host all EducationUSA advising centers, with one exception. As a result of these close ties to U.S. embassies, EducationUSA programs are integrated with other embassy and U.S. Department of State programs, including Access English for disadvantaged teenagers, the Young African Leaders Initiative (YALI), as well as academic exchanges and Fulbright programs. In addition, there are Opportunity Funds programs in Ghana, Nigeria, Togo, Botswana, Ethiopia, Kenya, Malawi, Namibia, Rwanda, Swaziland, South Africa, Uganda, Zambia, and Zimbabwe.

In keeping with African cultures, most advising takes place in person, and adviser availability is important to effectiveness. Intensive small group cohort advising has been particularly successful in this region, with advisers welcoming parents who want to be involved to join planning sessions.

Regional Overview

Africa marked record-high numbers of students in the United States in academic year (AY) 2016–2017, at 37,735, a healthy 6.7-percent increase over the previous year. West Africa is responsible for 51.0 percent of Africa's total population studying in the United States, followed by East Africa with 22.5 percent, Southern Africa with 17.2 percent, and Central Africa with 9.3 percent. Although there was a

2.7 percent decrease in F-1 visa issuances in FY17, after years of steady growth, the Student Exchange Visitor Information Systems (SEVIS) By the Numbers reports a modest but encouraging increase of 2.9 percent in African students on F and M visas between March 2017 and March 2018.

Africans are studying in 2,300 institutions in all 50 states plus the District of Columbia. Texas is the most popular state, with nearly 15 percent of all Africans, followed by New York, Massachusetts, California, Florida, Pennsylvania, Georgia, Minnesota, Illinois, and Ohio. Residents of African countries took 9,050 Graduate Record Examinations (GREs) and 3,697 Graduate Management Admission Tests (GMATs) in 2017.

African students are oriented toward credentials and degrees. Fewer than four percent of Africa's students in the United States are enrolled in non-degree programs. Online education has been slow to catch on as a result of the desire to get the full U.S. experience with hands-on practical exposure, and ongoing uncertainty about recognition of online credentials.

Graduate students. The number of graduate students studying in the United States is rising, particularly from West Africa, which recorded an increase of 8.5 percent in AY 2016–2017. Countries sending the most graduate students to the United States include Nigeria (39.2 percent of Africa's 10,800 graduate students in the United States), Ghana, Kenya, and South Africa. Countries reporting more than 35 percent of their



students in the United States at the graduate level include Botswana, Eritrea, Ghana, Malawi, Namibia, Nigeria, Sudan, and Uganda.

Preliminary indicators such as the Council of Graduate Schools and Student and Exchange Visitor Program (SEVP) surveys report that first-time graduate enrollment from Africa increased by 27 percent in AY 2016-2017, and total African graduate students studying abroad in the United States increased by 8.5 percent, in sharp contrast to declines in other parts of the world.

At the graduate level, many students initially look for professional degrees that carry funding, a rarity in the United States. After further research, goal-oriented students find programs and funding that meet their needs.

Undergraduate students. Undergraduate growth is greatest in East Africa, which recorded a 15-percent increase over AY 2015-2016, five times greater than the world average. Twenty-six percent of Sub-Saharan Africa's 21,128 undergraduates are enrolled in community colleges, and enrollment rates vary widely:

- Central Africa: 47 percent of undergraduates are enrolled in community colleges
- Lusophone/Spanish-speaking Africa: 39 percent
- Francophone West Africa: 35 percent
- East Africa: 22 percent
- Anglophone West Africa: 21 percent
- Anglophone Southern Africa: 18 percent

Central Africa's undergraduate growth topped the Africa region at 7.1 percent, with nearly half of all Central Africa's

undergraduates enrolled in community colleges. Cameroon's U.S. enrollments and student visa issuances are rebounding, and the Democratic Republic of the Congo continues to surge forward as well.

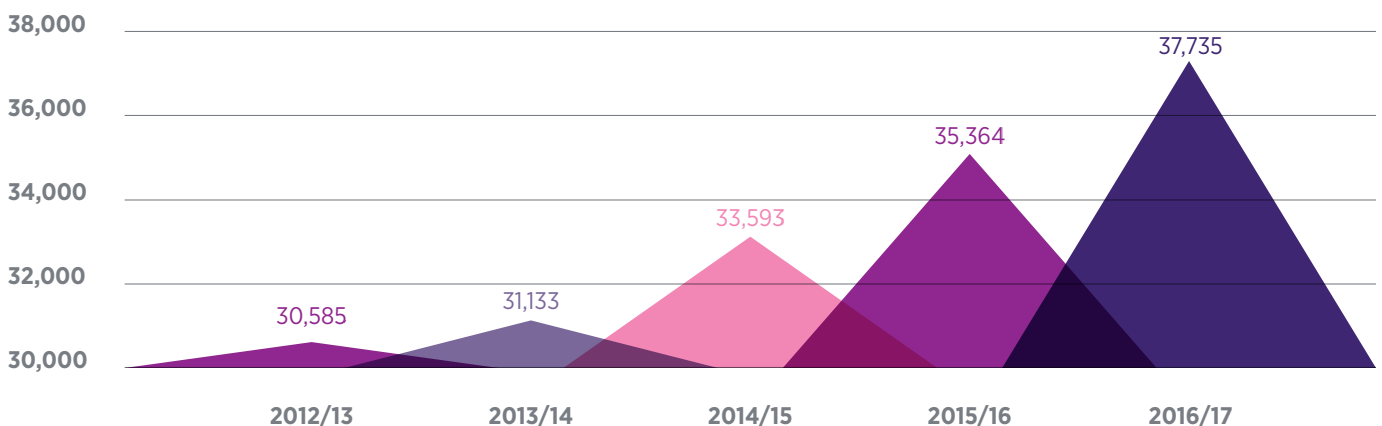
Intensive English Programs (IEPs).

IEP enrollment is very low in Africa, constituting about two percent of world total and decreasing steadily. In 2016, only 2,300 African students were enrolled in IEPs. Students should consider linking these programs to an on-campus program, and ensure that they have attempted a standardized English proficiency test before applying. One in every five IEP students comes from Angola or the Democratic Republic of the Congo.

Partnerships. Private higher education institutions (PHEIs) enroll 20 percent of Africa's tertiary students. The best private institutions promote educational flexibility, market responsiveness, and an entrepreneurial outlook that were unheard of a quarter century ago. Partnerships between U.S. and African PHEIs can tap into populations that seek mobility while maintaining strong ties to home. Also, academic partnerships between American and African HEIs are increasingly dynamic and promote African development. A prime example is Michigan State University's Alliance for Africa Partnership, the culmination of relationships dating to 1960.

Promise. Africa holds significant promise for the future of international education. The region offers diversity of perspectives

Student Mobility in the Region (Five-Year Trend)



Sub-Saharan Africa

and backgrounds, highly motivated students who seek out opportunities, a track record of high educational mobility, and 200 million young people between the ages of 15 and 24—equaling 20 percent of the total population. Africa also offers unique resources for research and fieldwork as well as academic and higher education partnerships. International education is woven into Africa's higher education framework, not only in terms of student mobility but also in curricula, employers' expectations, and career options. African students distinguish themselves on U.S. campuses with active participation and a notable work ethic.

A new report by the Pew Research Center confirms that Sub-Saharan Africans rank among the world's most mobile people, with 25 million living outside their countries of origin and eight of the ten fastest growing migrant populations. African emigration grew by 31% between 2010 and 2017, trailing only the MENA region. Two-thirds of migrants have remained in Africa, but six percent, or 1.5 million people, now live in the United States. These emigrants represent a strong source of remittance funding – projected to be \$39 billion in 2018 -- and support for African students in the United States. University World News reports that globally, Africans account for more than ten percent of mobile students, twice the world average.

Over the past fifteen years, Africa's higher education enrollment has grown from 2.25 to 6.34 million; coupled with rapid population growth and a demographic

youth bulge, the demand for higher education will explode over the next decades. Half of Africa's mobile students remain within the region, but unless capacity expansion accelerates, large numbers will seek education elsewhere.

In countries with robust economic prospects, U.S.-educated students are returning home to set up their own businesses and take advantage of opportunities in economies that are opening up. Leveraging tech hubs and startups is popular, as are investment and finance businesses, innovative agricultural ventures, and niche markets of all kinds. The ethic of giving back has inspired students to set up coding and robotics camps at home during summer vacations, and social entrepreneurship is dynamic and popular. U.S. universities will do well to tap into this energy and these initiatives.

Economic factors. Africa's economies are also moving forward. In 2017, Africa again claimed six of the world's ten fastest-growing economies: Ghana and Ethiopia lead with growth exceeding eight percent, followed closely by Cote d'Ivoire, Djibouti, Senegal, and Tanzania. Nigeria and South Africa make up almost half of Africa's GDP, but East Africa is the region's fastest-growing sub-region overall.

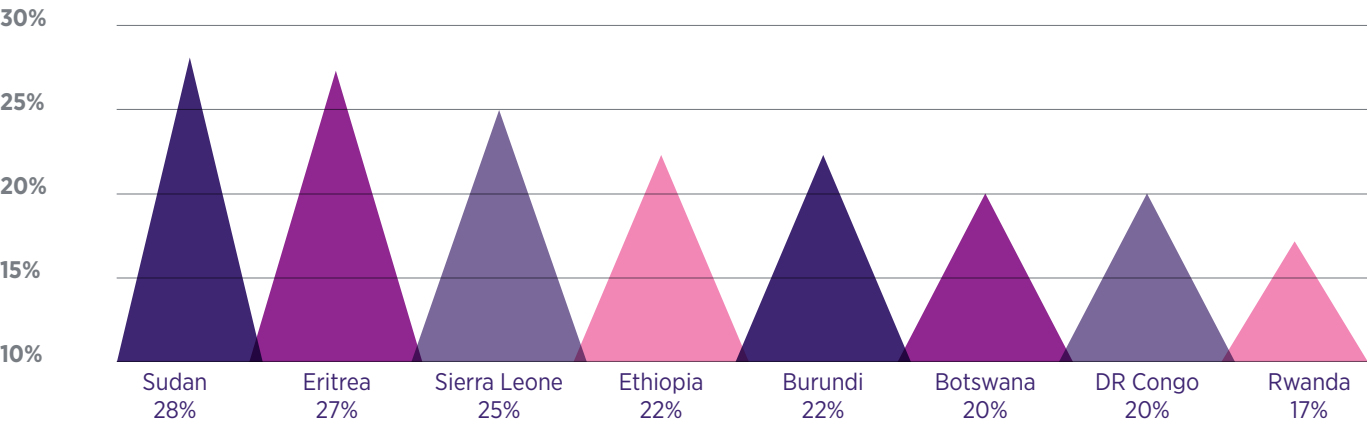
According to the World Bank, "[Economic] growth in the region is anticipated to pick up to 3.2 percent in 2018 from 2.4 percent in 2017. Stronger growth will depend on a firming of commodity prices and implementation of reforms. A drop in commodity prices,

steeper-than-anticipated global interest rate increases, and inadequate efforts to ameliorate debt dynamics could set back economic growth. South Africa is forecast to tick up to 1.1 percent growth in 2018 from 0.8 percent in 2017. Nigeria is anticipated to accelerate to a 2.5-percent expansion this year from 1 percent in the year just ended."

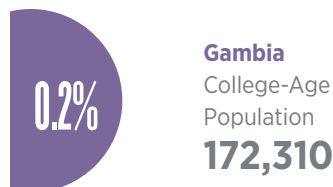
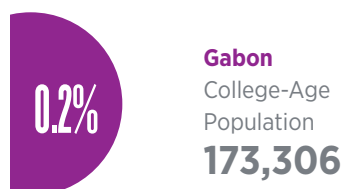
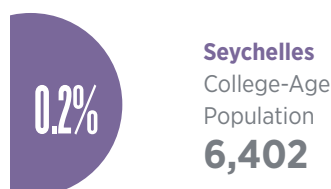
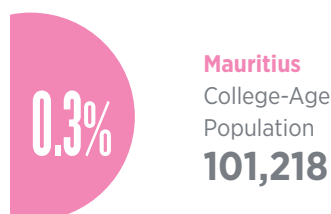
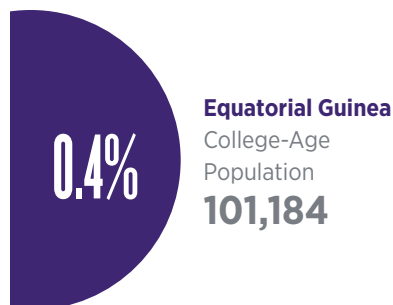
African students in the United States spend more than \$1 billion per year on their education. U.S. HEIs are increasingly willing to invest in African students to get the best talent the region has to offer. Consolidation of scholarships into meaningful funding awards makes a big difference in landing African students. Evaluating applicants in terms of their grit, resilience, motivation, and work ethic brings out more than grades and scores alone.

Cohort approaches. Cohort advising—intensive small group programs for dedicated, highly competitive students—has proven EducationUSA Africa's most effective strategy for improving outcomes for African students. Groups are called EducationUSA Scholars or Competitive College Clubs and operate in two dozen EducationUSA centers across the region. Most focus on undergraduate admission, with others focusing on sports scholarships and graduate admission. Cohort groups run for one to four years depending on language and other readiness. They build academic skills such as research, technology, writing, reading, communications, test-taking, critical thinking, and decision-making. U.S. colleges and universities recognize

Fastest-Growing Countries in the Region (with over 100 students): One-Year Increase



Five Countries of Origin in the Region with Highest Per Capita College-Age Student Mobility to the United States



Source: UNESCO Institute of Statistics; Indicator: 2015 Population of the official age for tertiary education, both sexes

that EducationUSA cohort students are an excellent investment, and the list of institutions awarding financial aid and scholarships grows longer each year. After a decade of experience, EducationUSA has seen that cohort students remain close in college, supporting each other, performing better, and distinguishing themselves in leadership.

A creative cohort model is thriving in the Gambia where Peace Corps Volunteer teachers lead cohort groups in rural high schools with a focus on basic study skills and motivation. Gap-year students who have successfully completed high school are invited to a U.S. embassy-sponsored weeklong boot camp, after which they start their college applications under the guidance of the EducationUSA adviser in Banjul.

Areas of study. Most African students start their U.S. study in traditional STEM and pre-professional (engineering, information technology [IT], business, and health) fields but exposure to new fields inspires them to change. The freedom to choose their majors, combine disparate fields, and get practical experience is particularly appealing to Africans. Africans increasingly take advantage of Optional Practical Training (OPT) but lately more have returned home rather than face perceived challenges surrounding employment authorization. Internships integrated into the academic program can be a key factor in attracting students to the United States.

Many students want majors that lead to independent careers: self-employment, professional qualifications, small firms, flexibility, and mobility. They also want to give back and seek careers with developmental impact. For this, the U.S. liberal arts system is increasingly recognized as the ideal.

Francophone and Lusophone students. Students from Francophone and Lusophone Africa are more likely to seek social science and business majors, often starting from a campus-based English or pathway program. They are looking for barrier-free admissions and less expensive schools. The intricacy of applying for scholarships is a challenge, but discounts and merit awards are appealing.

A major issue for Francophone students is the three-year Licence degree. Although all

of Africa's Francophone universities have converted to the Bologna LMD system, and many countries run a 13-year pre-university system, graduates encounter barriers to entry into U.S. Master's programs. EducationUSA recommends individual evaluation of applicants from three-year Licence degrees and for recognition of Bologna equivalents.

Despite large enrollments in France, Francophone Africans willing to undertake the extra work and expense seek an American degree because, in the words of one EducationUSA adviser, "It gives better access to good jobs, reflects the value of English in globalization, and the belief that American education is more practical than the theoretical model used in French universities."

Students from Anglophone countries have been acculturated to value science and engineering careers, which carry greater prestige. Although many stay with these majors, others discover the appeal of social sciences and non-STEM professions, and change their majors. Strong academic

African Students by Level of Study in the Region

Associate	7,179
Bachelor	18,769
Master	10,888
Doctorate	4,377
All Other	4,070

Source: SEVIS, December 2017

Regional Student Totals Top Five Countries of Origin

Country	2016/17	% Change 2015/16
Nigeria	11,710	9.7%
Kenya	3,189	5.6%
Ghana	3,111	2.0%
South Africa	1,911	5.4%
Ethiopia	1,847	21.8%

Sub-Saharan Africa

advising and a wide range of majors will best serve these students.

Travel to Africa. Travel to Africa requires more advance planning and can be expensive, but families are more likely to invest in educational institutions with which they have had face-to-face contact. EducationUSA and U.S. embassies actively support U.S. HEI travel in the region to maximize visitors' experiences.

Although many developing countries have constraints related to travel connections and means, reliability of electricity, and connectivity issues, determined students have mastered the art of overcoming challenges. Also, testing agencies do not all offer computer/internet-based testing in every country yet.

Recent Trends

Over the past two decades, African student mobility has been less affected than other world regions by global economic and political fluctuations as a result of isolation from major financial networks. Although a generally positive view of the United States motivates families to send students, US. HEIs should not take this attitude for granted. Parents are concerned about safety and security above all, which affects decisions about where to study.

Among African students, France is the most popular destination, with about 40,000 students, followed closely by the United States (37,700) and the United Kingdom (28,000), all relatively stable figures according to UNESCO's Institute for Statistics. In all, countries with historical ties

to Africa enroll close to 100,000 students, 70 percent of whom are in France or the United Kingdom. Areas of greatest growth include inter-African mobility, with an estimated 75,000–100,000 African students studying in other African countries, and study in Muslim-majority countries, the top seven of which enroll 30,000 students, led by Saudi Arabia and Malaysia.

Countries in the Spotlight

Nigeria. Nigeria enrolls 31 percent of all Africans in the United States and ranks 12th in the world as a sending country, with 11,710 students in AY 2016–2017, and annual growth above ten percent for the past several years. Growth in graduate enrollment (11 percent) is faster than growth in undergraduates (7 percent), and both are well ahead of the pace for Africa and the world as a whole. At the graduate level, Nigerians are looking for universities with strong reputations that carry weight internationally because they will be returning home to a highly competitive job market. At the undergraduate level, Nigerians are looking for good value for money, lower costs, and scholarships. Once on campus, they are determined to prove themselves and aim for top graduate schools.

U.S. universities face tough competition from the United Kingdom for Nigerian students, especially as Brexit is driving the United Kingdom to recruit more actively in Nigeria. Students from northern Nigeria are especially attracted to the United Kingdom over the United States, and Canada is also gaining Nigerian students.

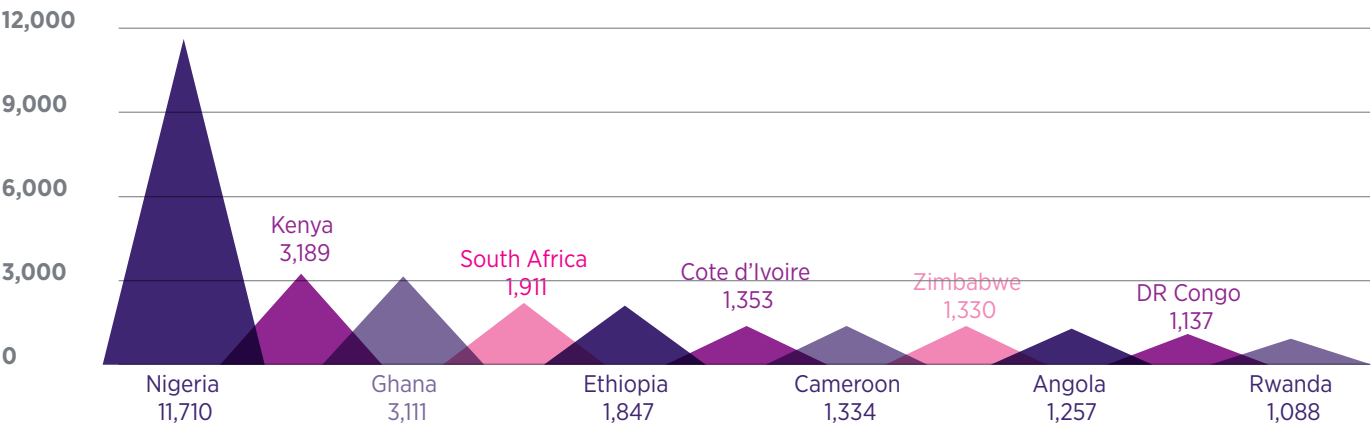
EducationUSA Nigeria provides additional services for admissions representatives from accredited institutions and attracts dozens of U.S. universities to its annual fairs held in September.

Kenya. Kenya is Africa's second largest source of students in the United States, and the United States remains the number one destination of Kenyan students by a wide margin, with 3,189 students in AY 2016–2017. A surge of almost ten percent in undergraduate enrollments in 2017 shows that Kenya is heading for a period of growth. There is renewed interest in engineering as development-oriented youth seek to build their country.

Kenya's government tightened university admission policies a year ago, and this, coupled with an unprecedented crackdown on grading in the Kenya Certificate of Secondary Education (KCSE) exams in 2017, has reduced university enrollments significantly. Only 11 percent of students (70,000 of 615,000) passed the KCSE with the required grade of C+ or higher to enter university, all of whom will be sponsored by the government. Private universities are particularly hard hit because public universities are able to absorb most of the qualified students. Many students will still seek U.S. education as first-year or transfer undergraduates because of strikes and inadequate facilities at local universities.

Ghana. With a robust 3,111 students, the United States is Ghana's top destination. Ghana has become so stable in the region that it attracts 20,000 international students into its 26 public and 87 private degree-granting universities. Academic

African Countries with More than 1,000 Students in the United States



partnerships and study abroad with the United States are also popular.

Graduate education in the United States is the fastest-growing sector. Forty-five percent of Ghanaian students are enrolled at the graduate level, considerably ahead of world and regional averages. Thanks to innovative on-campus programming, EducationUSA Kumasi is encouraging U.S. study among graduates of a leading university, Kwame Nkrumah University of Science and Technology (KNUST). Ghana has two universities participating in the MasterCard Foundation Scholars program, and several Centers of Excellence.

South Africa. South Africa is closing out a tumultuous year in which student campaigns for tuition-free university education and more equitable representation symbolized political and economic pressures. South Africa's greatest growth in U.S. enrollment is at the undergraduate level, increasing by nine percent from AY 2015-2016 to AY 2016-2017, and ushering in a fresh generation of students. South Africa cannot absorb all of its qualified students, resulting in many choosing to study abroad. The United States is South Africa's primary destination, and the most popular fields of study are engineering, biology, business, and performing arts.

Cote d'Ivoire. Cote d'Ivoire has recorded twelve successive record-breaking years of increasing enrollment in the United States, more than doubling its U.S. enrollments to 1,353, the highest in Francophone Africa. Community colleges claim 29 percent of Cote d'Ivoire's undergraduates. The most popular fields are business (especially Master of Business Administration), engineering, and computer science/IT. Cote d'Ivoire has a long history of entrepreneurship. As the uncontested economic hub of Francophone Africa, Cote d'Ivoire is globalizing through the establishment of private English-medium universities.

Cameroon. School and university closings in the country's Anglophone western provinces are driving students to apply to the United States in greater numbers, with an increase of ten percent in AY 2016-2017, and more in AY 2017-2018. Students tend to apply to less competitive schools where the admission process is

easier; community colleges account for 42 percent of undergraduates. Popular fields of study include business, health, and political science. Students pursue fields that enable them to return home and enter the private sector either by opening their own business or joining a family business. Cameroon is known as Africa in Miniature as a result of its diversity in culture, language, landscape, climate, and population.

Up-and-coming countries to watch include Rwanda, Eritrea, Ethiopia, Botswana, and Cabo Verde, where strong student mobility and fresh initiatives are promoting study in the United States.

What to Expect in the Next Three to Five Years

- EducationUSA Africa is cautiously optimistic about the potential for growth in the number of African students studying in the United States over the next few years, particularly the encouraging report from the Council of Graduate Schools that new African enrollment in U.S. graduate programs

increased by 27 percent in fall 2017 and from SEVIS By the Numbers that African enrollments on F visas alone increased by 2.9 percent between March 2017 and March 2018. Healthy undergraduate enrollment increases in AY 2016-2017 further encourage the expectation that Africa's U.S. enrollments will stay relatively stable.

- Factors that could reduce the flow of African students to the United States are positive for Africa: increased political stability, stronger national economies, and expanding local university systems, including the private higher education sector. African university enrollments increase by 15 percent per year, a substantial rate that still does not meet the demand by qualified students and exacerbates overcrowding. African universities are also internationalizing and adopting more flexible systems, harmonizing sub-regional systems to allow for exchanges and credential transfer. Reluctance by U.S. universities to recognize three-year Bologna Licence

U.S. Study Abroad

Top Five Receiving Countries in the Region

Destination	2015/16	% Change
South Africa	5,782	10.2%
Ghana	1,564	112.2%
Tanzania	1,254	3.1%
Uganda	722	37.0%
Kenya	681	7.4%

Five Countries (with over 100 students) with Highest Percentage Growth, U.S. Students in the Region (Five-Year Trend)

Country Name	2011/12	2015/16	% Change
Malawi	162	217	33.9%
Rwanda	308	411	33.4%
South Africa	4,540	5,782	27.3%
Ethiopia	267	302	13.1%
Tanzania	1,115	1,254	12.5%

Sub-Saharan Africa

degrees as equivalent to a Bachelor's degree could repress Francophone interest in U.S. HEIs.

Virtual and Social Media Usage

African students bound for the United States are at the forefront of technology use and operate from their mobile phones, even if these phones are not the latest models, as much as any young people around the world. Across Africa, 93 percent use mobile devices and will top Europe by 2020, by which time half of all Africans will have smartphones. WhatsApp is by far the most popular platform, used for individual and group communications. In Zimbabwe, WhatsApp accounts for 44 percent of all mobile internet usage in the country. Facebook Live is challenging Skype and webinars which are not easily run on phones, and is popular for chats between students on U.S. campuses and applicants back home. Students and parents appreciate recorded webinars or videos on university admissions pages and Facebook. Graduate applicants will make a point to participate in departmental webinars on the admission process, faculty research, and the like.

Successful Recruiting Strategies

Colleges and universities should use funding awards judiciously, as these can make the difference in a decision to enroll. Given that competitors such as the United Kingdom, Canada, and Australia offer little or nothing in scholarships, although overall costs are lower, the United States can provide a unique approach and advantage.

Consolidating small awards into a few larger ones is most effective for African students.

- Small group travel works well in Africa because it facilitates logistics and makes a greater impact on audiences. Small group travel also personalizes the admissions process in ways that African students and parents appreciate. Small groups can work with EducationUSA in each country to set up programs.
- EducationUSA advisers recommend mini fairs and cluster school visits, at which a group of secondary schools gather on one campus to meet visiting admissions representatives. It is important to start planning with EducationUSA at least two months ahead of time.
- Alumni in-country are essential because of their first-hand experience and students' ability to identify with them. Building a cadre of alumni in target countries will accelerate recruitment. Alumni can also represent U.S. HEIs at fairs and local events when an admissions officer cannot be present. EducationUSA holds alumni-college fairs in countries that attract few U.S. visitors.
- U.S. HEIs can leverage existing connections with Africa (alumni, academic partnerships, faculty coming from or working in target countries, community connections, sports) to energize recruitment in new countries.
- EducationUSA advisers recommend considering waiving application fees, as they are a challenge to process because Africans use local mobile money accounts

on their phones more than bank cards and obtaining U.S. dollar checks from banks is an expensive and cumbersome process.

- Paying for the College Scholarship Service (CSS) Profile is impossible for many financial aid applicants. U.S. HEIs need to be flexible and give vouchers freely or accept a hard copy International Student Financial Aid Application (ISFAA) to enable as many students as possible to complete their applications.
- In English-speaking countries, students are willing to take the SAT/ACT or GRE/GMAT, but resist duplicating their efforts with an English proficiency test. In countries where English is not the medium of instruction, students should be encouraged to take an English-language proficiency test to help demonstrate to the admissions office and the Consular officer that they are serious students.
- HEIs should offer flexibility in testing requirements, which is especially important in countries where certain tests are not offered or offered as paper-based (GRE, TOEFL) only three times a year.
- In-house credential evaluation at U.S. HEIs allows more students to complete their applications as it eliminates the cost and time element of independent evaluation, which may be a deterrent.
- A unique and clearly stated value proposition from U.S. HEIs is important and can influence African students and their families.

Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students in the Region (Five-Year Trend)

Country	2012/13	2016/17	%Change
Congo, Dem. Rep. of	386	1,137	194.6%
Rwanda	565	1,088	92.6%
Equatorial Guinea	196	360	83.7%
Sudan	187	324	73.3%
Sierra Leone	123	209	69.9%

194.6%

Congo, Dem. Rep. of has the largest percentage growth in the region over the last five years (with over 100 students)

- U.S. HEI websites and literature should provide detailed costs and scholarship/financial aid amounts, stating clearly which funds international students are eligible for. Availability of scholarships attracts applicants and sets up healthy competition.
- Admissions office responsiveness to student enquiries make them feel welcome and wanted.

Foreign Government and Private Funding

Funding from governments of African countries is rare to nonexistent, especially in a context of falling oil prices. Cote d'Ivoire and South Africa are the only countries reporting limited scholarship schemes at present.

Regional EducationUSA Events

EducationUSA Africa will hold its Regional Forum in Kampala, Uganda, from September 18–20. EducationUSA advisers from all countries with advising services in Africa, REACs, U.S. Department of State officials, Institute of International Education representatives, and representatives of U.S. HEIs will attend. The program includes sessions, workshops, a country showcase, and a college fair open to the public.

Fairs and Conferences

- **Cabo Verde.** May–June: EducationUSA college fair in conjunction with U.S. Army Cadet Command, on three islands
- **Chad.** May: Career fair organized by alumni of Sacre Coeur High School
- **Lesotho.** November: EducationUSA college fair
- **Mauritius.** February: International Career



and Expo Fair, sponsored by Rotary Club and November: Campus Abroad Education Fair

- **Nigeria.** September 24–25: EducationUSA annual college fair in Lagos, September 26–27 in Abuja
- **Togo.** April: Salon International des Etudes et Formations
- **Uganda.** March: Education Fair and September: Careers Fair sponsored by Rainbow International School
- **Zimbabwe.** July: EducationUSA annual college fair in Harare

For details on fairs and best times to visit, see individual country pages at www.educationusa.state.gov.

U.S. Study Abroad in Africa

Study abroad participation in Africa rebounded in AY 2015–2016, gaining almost 20 percent with 12,738 U.S. students in Africa. South Africa is by far the most popular destination, welcoming 5,800 students, followed by Ghana (1,600), Tanzania (1,300), Uganda (700), Kenya (700), and Rwanda (400). The leading Francophone destination is Senegal, receiving nearly 300 students.

Best and Worst Times of the Year to Interact with Students (Face to Face and Virtually)

Recruiting is a year-round process in Sub-Saharan Africa. The best times to plan travel are when schools are in session.

West and Central Africa. The best times to visit are January to March, May to mid-July, and October to November.

Southern Africa. The best times to visit are February to May and July to August.

East Africa. The best times to visit are March to June and October to November.

Times to avoid travel: Ramadan, Easter, Christmas, and exam periods (April to June and November to December).

East Asia and Pacific

Regional EducationUSA Profile

Australia, Brunei, Burma, Cambodia, China, Federated States of Micronesia, Fiji, Hong Kong, Indonesia, Japan, Kiribati, Laos, Macau, Malaysia, Marshall Islands, Mongolia, New Zealand, Palau, Papua New Guinea, Philippines, Republic of Korea, Samoa, Singapore, Taiwan, Thailand, Timor Leste, Tonga, Vietnam

61

EducationUSA Advising Centers in the Region

22 Comprehensive
24 Standard
15 Reference



EducationUSA advising centers in East Asia and Pacific (EAP) cover a wide geographic area and serve a diverse student population that varies greatly in terms of academic goals, financial needs, and social/cultural preferences from one country to the next. Advising centers are located at U.S. embassies and consulates, Fulbright Commissions, and American Corners, as well as at local universities, libraries, and non-governmental organizations (NGOs). Three EducationUSA Regional Educational Advising Coordinators (REACs) are assigned to the large region, and more than 80 EducationUSA advisers provide guidance and regional expertise to prospective students, U.S. higher education institutions (HEIs), and other stakeholders.

Regional Overview

The EAP region encompasses an expansive area of land and sea, with almost a quarter of the world's population and a wide range of religions, languages, and cultures. This region includes many of the top places of origin for international students in the United States. With a total sending population of 522,594 students in AY 2016–2017, the region accounts for approximately 48.4 percent of all international students in the United States, and the numbers continue to grow each year.

Recent Trends

The region has exhibited steady growth in student mobility over the past five years due to continuing interest in the American higher education sector and the value attributed to international educational experiences by communities across EAP. However, as competition for international students increases, and more destinations in the region and worldwide expand their capacity and presence in the international higher education market, the U.S. higher education

sector faces a unique set of opportunities and challenges in meeting the ongoing demand for quality higher education while maintaining its position as the leading academic destination worldwide.

Countries in the Spotlight

Australia. With more than 30,000 students studying abroad, and 327,606 international students studying in the country, Australia is both a strong source of international students and a major destination for study abroad students from around the world. Australia has had 26 years of uninterrupted economic growth, and education is its third largest export. Australia is the eighth leading host of U.S. study abroad students.

The number of Australian students studying in the United States has risen consistently over the past decade, and America is the top destination for Australian students. According to the 2017 *Open Doors* report, 4,933 Australian students are studying in the United States, a 3.8-percent increase over the previous year. Of the total, 48.6 percent are students at the undergraduate level, 23.1 percent graduate, and 9.2 percent in Optional Practical Training (OPT). Notably, OPT increased by 11.5 percent, which is consistent with students' interest in internships and work experience. Opportunities for athletic scholarships and sports programs at all levels are popular among Australian students, and Australia is the third largest sender of National Collegiate Athletic Association (NCAA)-eligible athletes to the United States. The graduate market is relatively untapped and is an area for growth potential.

Although travel costs and the size of the Australian continent can be a

challenge, U.S. intuitions can establish an effective recruitment strategy by prioritizing EducationUSA and other student recruitment fairs, targeting less commonly visited cities and Western Australia, and leveraging Australia's proximity to other growing markets including New Zealand, Indonesia, and the Pacific islands.

Brunei. AY 2016–2017 marks the lowest number of Bruneians studying in the United States for the past five years. The most recent 10.2-percent decrease in numbers reported by *Open Doors* is a reflection of Brunei's overall economic slowdown, an effect of the rapid falling of oil and gas prices causing a significant reduction in the funds allocated for national scholarship programs. These economic constraints have also affected Bruneian student mobility to other countries such as the United Kingdom, Australia, and New Zealand. Previously the Bruneian government sent between 300 and 500 scholars abroad every year for undergraduate and graduate programs. The United Kingdom, Australia, New Zealand, and neighboring countries are preferred destinations.

Cambodia. Cambodia's economy is one of the fastest growing in the world, and its gross domestic product is expected to continue growing at a rate of approximately seven percent per year. With Cambodia's booming economy, greater numbers of Cambodian students are in a position to fund their education abroad. Seventy percent of the population is under the age of 35, with more young people striving to continue their education past the primary and secondary levels. The number of high-quality private international high schools in the country is also rapidly growing, and these institutions serve as a pipeline of better prepared Cambodian students who meet U.S. academic and admissions requirements. Many Cambodian students consider American institutions of higher education to be of the highest quality and are increasingly interested in community colleges as a result of the benefits of affordability and accessibility. English is used widely in Cambodia, including in government, NGOs, and major private sectors. The top five fields of interest among Cambodian students are business, economics, education, political science, and English literature.

China. China remains the top sending country of international students to the United States, with interest in U.S. study from students at all levels. A new Chinese government initiative to develop world-class academic institutions and programs has increased the number of Chinese universities seeking partnerships with U.S. institutions, including joint and dual degree offerings. In AY 2016–2017, 350,755 students from China studied in the United States, an increase of 6.8 percent from the previous year. Science, technology, engineering, and mathematics (STEM) and business remain the most popular fields but increasing numbers of Chinese students are choosing to study arts, education, and humanities.

As of January 2017, the Chinese government will no longer issue licenses for study abroad agents. The impact of this policy change on academic recruitment and placement service providers remains to be seen.

According to World Education Services' research, Chinese students heavily weigh institutional rankings when selecting colleges and universities abroad. Other important factors for Chinese students include admissions rates, location, and future employment prospects. Reports in the Chinese media highlighting incidents of violence in the United States have a significant impact on students' choices and have motivated some students to choose Canada, the United Kingdom, or Australia for study abroad.

Indonesia. Based on the 2017 *Open Doors* data, nearly 9,000 Indonesian students are studying in the United States, which constitutes a 13-year high. More than 61.6 percent of the Indonesian students studying in the United States are undergraduates. Business management, STEM, language, education, and international relations are the most popular fields of study, and a large number of Indonesians are enrolling in community colleges. Indonesian universities tend to search for joint degree programs, research collaboration, and student and lecturer exchanges with U.S. HEIs.

Japan. After years of steep decline, the fall in the number of Japanese students studying in the United States has leveled, and Japan is currently the eighth largest sender of international students to the United States. America remains the top destination for Japanese students, followed by China, Taiwan, and the United Kingdom.

To foster greater global competitiveness among the next generation of citizens, the Japanese government aims to double the rate of study abroad by 2020. The Japanese Ministry of Education, Culture, Sports, Science, and Technology (MEXT) has set a goal of sending 120,000 Japanese university students and 60,000 high school students abroad by 2020.

In its effort to build global *jinzai*, or talent, MEXT has implemented an array of projects,



East Asia and Pacific

many in partnership with the private sector, to encourage universities to internationalize and to imbue the next generation of leaders with global competency. Key projects include the Top Global University Project, the naming of Super Global High Schools, and MEXT cooperation with the International Baccalaureate (IB) organization to increase the number of IB schools in Japan to 200 by 2018. In addition, an increasing number of academic departments and disciplines at Japanese institutions are making overseas study compulsory, and universities are increasing their offerings of English language coursework and programs to increase English proficiency.

Malaysia. The number of Malaysian students studying in the United States has increased steadily since AY 2007–2008, and the latest increase of 5.3 percent brings the total number to 8,247 for AY 2016–2017. However, the rate of increase has slowed among both undergraduate and graduate populations. Malaysian undergraduate student mobility to the United States grew by only 1.4 percent in AY 2016–2017 compared with a 7.7-percent increase in AY 2015–2016, and graduate student mobility grew by 5.5 percent compared with 6.7 percent the previous year. The majority of Malaysian students in the United States are members of the Chinese ethnic minority.

Malaysia is becoming an education hub and more than 100,000 international students from around the world, many from the Middle East and Africa, currently study at Malaysian institutions. Because the higher education system in Malaysia

is of high quality, many students, especially non-Malaysian students, choose undergraduate programs in Malaysia and then go abroad for graduate study. The Ministry of Higher Education in Malaysia has encouraged public universities to prepare university graduates for “Industry 4.0,” which is expected to be the next trend in manufacturing and will rely heavily on technologies such as data exchange, automation, robotics, and the “Internet of Things”.

Mongolia. According to the National Statistics Office of Mongolia, the country’s total population reached 3.1 million in 2016, with approximately 66.2 percent under the age of 35. Mongolia is recovering from an economic recession over the past few years with support from the International Monetary Fund and other international organizations. By the end of 2017, economic growth in Mongolia had reached five percent. With an economy significantly dependent on its mining sector, Mongolian economic projections remain positive as a result of higher prices for commodities such as coal and copper.

The number of HEIs in Mongolia has decreased in the past ten years, as the Ministry of Education has improved the standards for accreditation. The Mongolian higher education sector includes 18 public and 75 private colleges and universities, and many institutions, especially private universities, are seeking to establish joint degree programs and partnerships with U.S. colleges and universities. In addition, there are opportunities for teacher training programs in all fields, especially

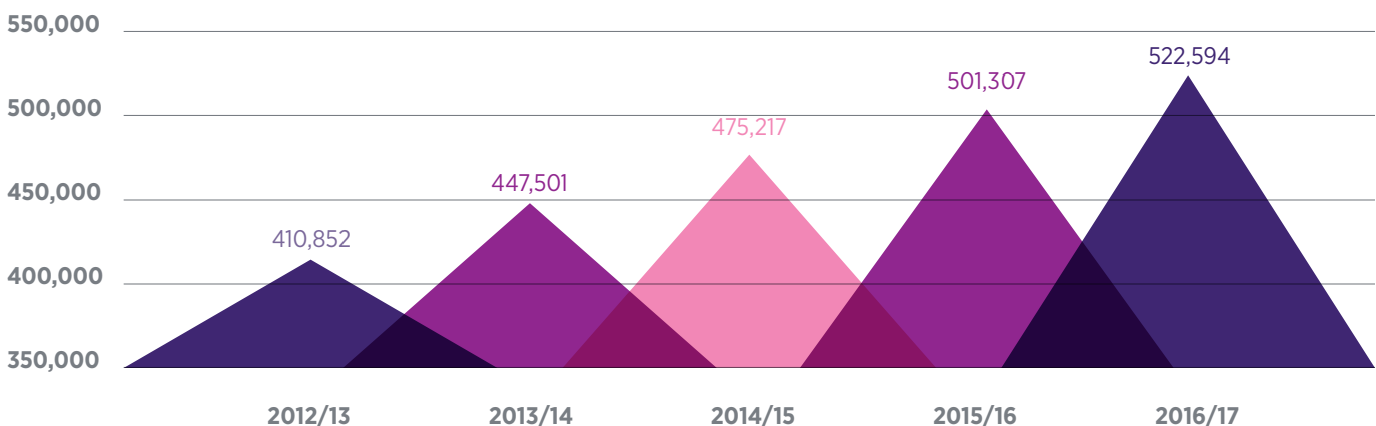
English language teaching, and Mongolian teachers are eager to pursue professional development.

New Zealand. Student flow from New Zealand to the United States continues to trend upward with a 33-percent increase in the past five years. The United States is the second most popular study destination for New Zealand students after Australia. Much of the increase is attributed to more students pursuing undergraduate degrees and OPT in the United States. Opportunities for students to explore extracurricular activities, employment, and internships on American campuses should be highlighted when engaging prospective students during the recruitment process. New Zealand is a top ten sending country for student athletes to the United States and sends the second most student athletes to NCAA programs per capita. The opportunity to play sports continues to be a key driver for undergraduate students.

New Zealand hosts a growing international student population of approximately 120,000 students from across the globe. Education New Zealand (ENZ), New Zealand’s government agency for building international education, is working to improve, diversify, and expand the country’s international education programs and secure international recognition of New Zealand’s academic credentials. ENZ also administers scholarships to send students abroad.

In late 2017, New Zealand’s newly elected government announced a plan for free tertiary education. The policy, which the

Student Mobility in the Region (Five-Year Trend)



government will phase in over several years, will grant three full years of free postsecondary study to any student who has not previously enrolled in tertiary education. Despite this proposed policy shift, EducationUSA offices in New Zealand continue to see a steady level of interest in U.S. study.

Philippines. According to the annual *Open Doors* report, the number of students from the Philippines studying in the United States increased 4.2 percent to 3,006 in AY 2016–2017. According to the International Consultants for Education and Fairs report on outbound mobility, in 2014, the major study destinations for Filipinos were the United States, Australia, and the United Kingdom. In-person recruitment in the Philippines remains an effective strategy. U.S. colleges and universities have a number of options including EducationUSA and other recruitment fairs that travel through multiple countries consecutively throughout the region each year. According to a recent presentation during the 2017 Commission on Higher Education General Assembly, students from the Philippines continue to prioritize traditional fields of study including business and management; engineering and technology; humanities, social sciences, and communications; as well as health-related fields

Republic of Korea. The Republic of Korea, often referred to as South Korea, is the third leading sender of students worldwide to the United States, though mobility numbers continue to decline as the result of a number of factors including a low birthrate, costs in relation to a U.S. education, and concerns about future employability. Historically, the United States has been the most popular destination for South Korean students; however, China has recently become the number one destination. Interest in Australia, Canada, New Zealand, and Europe is also on the rise, and the Republic of Korea itself is improving its already robust higher education sector to become a hub for international education in East Asia. Despite these shifts, more South Korean students are seeking full degrees and choosing more long-term study abroad programs in the United States.

Opportunities for U.S. institutions to effectively recruit in the Republic of Korea lie in sustained engagement, diversification of outreach, and mobilization of alumni,

current students, and other local institutional networks. Although the Seoul metropolitan area is still the major source of students, other cities can yield prospective students but currently have very little direct engagement with U.S. universities. Second and third tier cities and Ministry of Education schools remain untapped and attractive markets. Although mobility in all other academic levels fell, OPT numbers for the Republic of Korea rose ten percent over the last year; particularly for graduate students. U.S. institutions should highlight not only the opportunity to pursue internships and on-campus employment but also specific success stories, especially stories of recent South Korean graduates. South Korean students respond positively to alumni and current students from similar backgrounds; however, such content is noticeably lacking or difficult to find on websites, marketing materials, videos, and social media.

South Korean students in the United States pursue degrees in a wide array of academic fields, and although just more than one-third enroll in STEM programs, large numbers study business, fine and applied arts, social sciences, and other fields. With advanced planning and promotion, recruitment targeting niche markets and fields of study can be particularly effective. The Republic of Korea is a major recipient of students from the EAP region and numbers from other world regions, including the United States, are also rising. As the Republic of Korea seeks to solidify a position in the international education landscape but struggles with domestic demographics and the decreasing number of high school students, U.S. institutions seeking partnerships may need to emphasize the ways in which these collaborations are mutually beneficial and bolster South Korean universities.

Vietnam. Vietnam is the top sender in Southeast Asia of students to the United States and ranks sixth among senders worldwide. The 2017 *Open Doors* data highlights a 4.8-percent increase in enrollment over the past year, bringing the total number of students from Vietnam studying in the United States to 22,438. The most popular fields of study include business, finance/banking, and economics followed by STEM fields, social sciences, and humanities. Vietnamese students in major metropolitan areas have ample access to academic and English

language testing centers and preparatory courses; however, courses are often not available to students in the provinces. To take standardized tests, students from outside larger cities must travel, posing financial and logistical obstacles.

Approximately 40 United States–Vietnam joint programs offer BA, BS, MA, and MS degrees in various fields across the country. According to the Vietnamese Ministry of Education and Training (MoET), business administration, computer science, finance, and banking are the most popular majors within these joint programs. However, joint programs in Vietnam also face challenges such as high costs, complex legal frameworks, lack of qualified teaching staff, curriculum alignment with foreign partners, and quality facilities. There has been a rise in United States–Vietnam joint programs that offer Associate degrees in Vietnam followed by Bachelor's degree completion in the United States. Approximately 70 percent of Vietnamese students attend public high schools, but direct access for American institutional representatives can be challenging, so recruitment fairs continue to provide the best opportunity to engage students and parents.

What to Expect in the Next Three to Five Years

- EAP will continue to expand the variety and quality of its international educational opportunities. The growth of regional education hubs in Australia, China, Republic of Korea, Malaysia, New Zealand, and Singapore as well as existing international programs and the presence of foreign branch campuses will continue to provide an array of options for students to study abroad within the EAP region. Generous scholarships already encourage student mobility from within the region and beyond. New Zealand and Australia are actively working with other governments to increase recognition of their education credentials and create pathways for inbound and outbound mobility.
- China's One Belt, One Road (OBOR) initiative seeks to link countries in Asia, Europe, and Africa to enhance economic development and trade with these regions. China is investing heavily in related infrastructure projects including education and workforce development as the initiative creates opportunities for international commerce and development.

East Asia and Pacific

Several countries have signed agreements to offer scholarships funded by the government of China.

- EAP is a prime market for community colleges. According to the *Open Doors* report, the top four senders to U.S. community colleges are all EAP countries: China, Vietnam, the Republic of Korea, and Japan. Students from these top four countries account for 42.1 percent of the total international community college population in the United States. Prospective students are increasingly interested in community colleges as a result of the affordability and accessibility of these institutions, and the potential to complete four-year degrees in the United States through articulation agreements. Intensive English language programs at American community colleges that offer students opportunities to increase language proficiency while building strong academic foundations are also of interest to students across the region. Burma, Cambodia, Malaysia, and Mongolia are also promising markets for U.S. community colleges.
- Internationalization of higher education as well as primary and secondary education is a growing trend in the region. Based on high demand, the number of private, bilingual K-12 schools in China with international curricula geared toward students who intend to study abroad at the secondary and postsecondary level continues to grow. There are also increasing opportunities in second- and third-tier cities for collaboration with Chinese high schools and universities seeking partnerships with U.S. institutions.

High schools with international programs are seeking collaboration with U.S. institutions on extracurricular program development in STEM fields and academic disciplines prioritized by national governments in the region, such as artificial intelligence, cyber security, and others. The Japanese government is also making efforts, particularly leading into the 2020 Tokyo Olympics, to internationalize curricula at all levels and send more Japanese students abroad.

- The demand for mutually beneficial institutional partnerships will remain strong. Although Taiwan remains primarily a graduate market, more undergraduate students will participate in short-term study abroad programs and summer sessions in the United States. Most Korean institutions have fruitful partnerships in multiple countries, but they are prioritizing relationships with U.S. institutions that offer reciprocal student exchange. In Singapore, there has been an increase in university partnership programs with locally based branch campuses of foreign institutions that provide opportunities for local students to study at home and leverage subsidized tuition rates while obtaining an overseas degree. These partnerships are more prevalent among UK and Australian universities, as U.S. institutions have found collaboration with Singaporean universities difficult as a result of the difference in academic systems and calendars. Despite these challenges, there has been a recent increase in collaboration between polytechnic institutions in the United States and Singapore. HEIs in Singapore have

started to explore partnerships and joint degree programs with foreign universities when that model is most mutually beneficial. Demand for OPT and study abroad programs is growing in Australia and New Zealand, and some institutions have mandated international experience for specific coursework and disciplines.

- Student mobility from Southeast Asia to the United States will likely continue to increase. In Singapore, where the domestic demand for postsecondary education exceeds the number of seats available, students will look for opportunities to study overseas. Although cost is a challenge for students from Burma, the increasing number of recruitment visits by U.S. institutions is evidence that interest among prospective students, particularly in community colleges, is on the rise. Burma has recently announced the new President's Award Scholarships for Burmese students to study abroad for undergraduate and graduate courses, which might also stimulate a boost in application numbers.
- In Malaysia, the current strengthening of the ringgit against the U.S. dollar makes higher education in the United States more affordable for students and their families. Foreign degrees are an advantage in the current competitive job market, but American institutions face increasingly strong competition for Malaysian students from UK, Australian, and even Chinese universities that have branch campuses in Malaysia.
- The Philippines' integration into the Association of Southeast Asian Nations

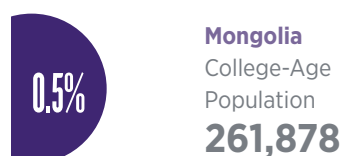
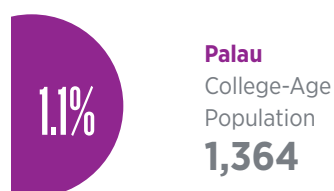
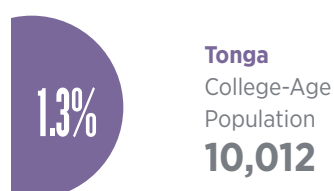
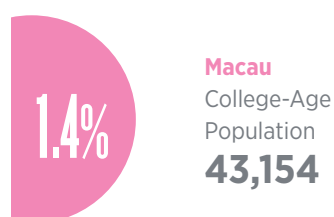
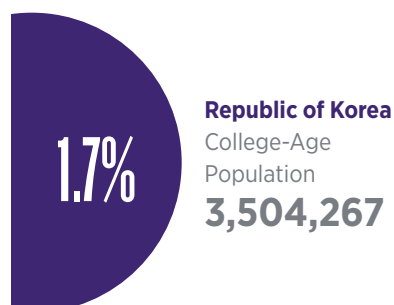
Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students in the Region (Five-Year Trend)

Country	2012/13	2016/17	%Change
China, People's Rep of	235,597	350,755	48.9%
Myanmar	955	1,351	41.5%
Vietnam	16,098	22,438	39.4%
New Zealand	1,311	1,741	32.8%
Cambodia	393	512	30.3%

48.9%

China, People's Rep of has the largest percentage growth in the region over the last five years (**with over 100 students**)

Five Countries of Origin in the Region with Highest Per Capita College-Age Student Mobility to the United States



Source: UNESCO Institute of Statistics; Indicator: 2015 Population of the official age for tertiary education, both sexes

(ASEAN) has resulted in a national policy requiring local faculty to obtain graduate degrees in their fields, presenting an opportunity for U.S. institutions. In addition, local institutions continue to express interest in practicum programs abroad and student exchanges.

- After 16 consecutive years of increased student mobility to the United States, Vietnam has developed a significant population of local alumni from U.S. institutions who, with the appropriate authorization and guidance, can be well positioned to promote their alma maters and U.S. study in their local communities. The Vietnamese government has prioritized the improvement of higher education quality, increased budget allocations for education, liberalized private sector involvement, and encouraged foreign participation in the development of education and training services. One noteworthy initiative in Vietnam is intended to establish a New Model University that will comply with international standards and include partnership agreements with an array of foreign institutions. Current examples of bilateral ventures include the Vietnam-Japan University in Hanoi, Vietnam-German University in Ho Chi Minh City, University of Science and Technology of Hanoi, and Vietnam-France University.
- In the coming three to five years, students from Thailand are expected to remain interested in international education, become better qualified to apply to U.S. HEIs, and see increased opportunities to engage with American colleges and universities. Based on trends in recent years, it is expected that full-length business and engineering programs as well as short-term English language programs in the United States will remain popular. Thai students' interest in U.S. education stems in part from shifts that have occurred since the opening of the ASEAN Economic Community that have encouraged students to develop cross-cultural communication and English language skills. The Thai government is improving the education system and curriculum to better reflect international standards and modern technology.

Virtual and Social Media Usage

Internet penetration across EAP is either

growing rapidly or already at high levels, and EducationUSA advisers rely heavily on social media platforms to connect with students in all countries across the region.

- Ninety-five percent of Filipinos are connected on Facebook alone. Social media use in Thailand continues to grow, with 80 percent of connected consumers using social media or instant messaging platforms on a daily basis. According to the eMarketer 2017 database, 75.8 percent of Taiwan's population (approximately 17.8 million people) use smartphones, and Facebook Live has also become an effective way to reach young people. The internet is widely available and very affordable in Singapore, and most public places (including the train system and many restaurants) have free WiFi access. Facebook dominates the field in Singapore where more than 70 percent of all citizens have an account. YouTube and WhatsApp follow closely, each holding 50-percent market penetration.
- Even emerging student markets in EAP are becoming increasingly connected via social media, and recent infrastructure upgrades have increased internet speeds in the Pacific Islands of Palau, the Marshall Islands, and Micronesia. An increasing number of Mongolians use smartphones to access online content, and internet penetration—currently at 36 percent (according to Internet Live Stats)—continues to grow each year. In Laos, as of December 2017, approximately 1.5 million people had access to the internet (about 20 percent of the population), and high-speed internet, LTE, and 4.5G access

Regional Student Totals Top Five Countries of Origin

Country	2016/17	% Change 2015/16
China, PR	350,755	6.8%
Rep. of Korea	58,663	-3.8%
Vietnam	22,438	4.8%
Taiwan	21,516	1.8%
Japan	18,780	-1.5%

East Asia and Pacific

is available in most major cities. Many businesses offer free WiFi connections; however, the price of internet service is quite variable, and users choose their own speeds and packages.

- Although there is some consistency across EAP, the social media platforms of choice among students can vary by country, so U.S. institutions interested in reaching students virtually are encouraged to contact EducationUSA centers for guidance on the most effective strategies. The most widely used platforms in the region include Facebook, Instagram, YouTube, and Twitter. Australia and New Zealand follow this trend, but Snapchat is also gaining popularity in the region, and webinars, partly as a result of time differences, are not as effective as in-person engagement.
- Social media is an important communication tool through which Chinese students and parents obtain information about studying in the United States, but many popular social media platforms such as Facebook, Instagram, YouTube, and Twitter, as well as Google products are blocked in China. EducationUSA encourages U.S. institutions to employ the Chinese social media equivalents to reach Chinese students and parents. The majority of the Chinese population is active on mobile devices, and WeChat is currently the most popular social media platform available on smartphones. Sina Weibo also holds a strong market share among Chinese social media users. Live streaming has recently become popular among young people in China, and many educational programs are streamed to reach the widest audience possible.
- Facebook and Instagram have grown in Korea recently, but Naver is still the search and social platform of choice. Kakao Talk and its suite of services is also used almost ubiquitously, and many U.S. institutions have taken advantage of Kakao Talk's many features for outreach. Twitter and YouTube are popular in Japan, and Instagram use has also grown significantly. *Instabae*, a newly coined Japanese term to describe things that look good on Instagram, was picked as one of the 30 candidates for the top buzzword of the year in Japan for 2017. Interestingly, the Japanese platform, LINE, dominates the

online experience in Thailand where 92 percent of connected consumers are users, according to *Connected Life*.

- As high-speed internet penetration increases, so do opportunities for online promotion of events, engagement with students through social media, and video outreach through platforms such as Facebook Live, Zoom, and Google. Many EducationUSA centers in EAP promote events through center or embassy webpages, and some offer opportunities for U.S. institutions to connect with students live virtually and archive videos of these engagements for future viewing on demand.

Successful Recruiting Strategies

- Provide specific information about financial assistance. Most students rely on personal or family funds to study overseas. Target information about funding opportunities to specific student demographics by producing materials in local languages and highlighting opportunities relevant to their needs.
- Provide information to students and parents about campus safety, student services, and extracurricular activities for international students.
- Provide information about student internship and work-study opportunities. Graduate students are especially interested in gaining laboratory, research, and teaching experience.
- Community colleges should provide detailed information about articulation agreements and the process of transferring to four-year institutions.
- Participate in EducationUSA high school counselor training programs, where offered. These programs can help build institutional relationships with influential local high school counselors and multiply the impact of outreach efforts as they share information with their students.
- Develop attractive, easy-to-navigate, mobile-ready websites and online resources for international students. Consider versions for country-specific platforms in targeted markets.
- Use video testimonials to share success stories of alumni or international students who currently study at an

institution. Work with EducationUSA centers to highlight this content on social media pages.

- Recognize that in-person recruitment travel in the region is a must. An investment in sustained engagement over time to build trust and name recognition remains very important in Asian context where students and families are brand conscious and parents are deeply involved in the selection of institutions.
- Attend EducationUSA fairs, regional forums, and other programs to maximize engagement with students and EducationUSA advisers.
- Diversify outreach strategies and target second- or third-tier cities, underserved communities, and less commonly visited countries.

Foreign Government and Private Funding

Brunei. To offset the impact of current economic challenges, the government of Brunei has introduced a student loan program offering partial or full low-interest loans with flexible repayment options. Successful loan applicants who perform at specified academic levels may also qualify for loan-to-scholarship-conversion benefits upon graduation. The government also designed loans to support high-performing students who have fallen just short of government scholarship criteria. The loan program also allows successful graduates to pursue work/study opportunities prohibited within the government scholarship programs.

Cambodia. The Cambodian government does not provide any funding to support students studying abroad in the United States. Leading sources of funding for U.S. study are the Fulbright Fellowship, SHE-CAN (www.shecan.global), and the Open Society Scholarship Programs (www.opensocietyfoundations.org/about/programs/scholarship-programs).

China. Of Chinese students studying abroad globally, 91.5 percent are self-funded, but the China Scholarship Council also offers hundreds of government scholarships for Chinese and American students and faculty. The Chinese government increased the FY2017 budget to support international study programs by 9.17 percent to more than RMB3.8 billion. This amount includes funding for Americans studying for a

degree or academic credit in China and for Chinese students studying abroad. The Chinese government also gives preference to countries affiliated with the OBOR initiative for additional scholarships.

Indonesia. The Indonesian government offers an array of scholarship programs, including the popular Indonesian Endowment Fund for Education's LPDP Scholarship, which provides full tuition and expense coverage for graduate studies (www.kemlu.go.id/newyork/id/Pages/Beasiswa.aspx#).

Japan. MEXT and Keidanren (Japan Business Federation) provide a number of scholarship options for Japanese students. In FY2014, MEXT launched the Japan Public-Private Partnership Student Study Abroad Program—TOBITATE! Young Ambassador Program (www.tobitate.mext.go.jp/guide/scholarship/index.html), which offers funding in support of the Japanese government goal to double the number of students studying abroad by 2020. The Japan Student Services Organization provides a comprehensive list of local government scholarships in an annual document and an updated resource online (bit.ly/JASSO).

The TOMODACHI Initiative is a public-private partnership between the U.S.-Japan Council and the U.S. embassy in Tokyo, with support from the government of Japan. Born out of support for Japan's recovery from the Great East Japan Earthquake, TOMODACHI invests in the next generation of Japanese and American leaders through educational and cultural exchanges and leadership programs as well as through scholarships for study abroad (usjapantomodachi.org).

Malaysia. The number of scholarships for U.S. study offered by Malaysian companies and government agencies has recently declined, but major companies such as Khazanah Nasional, Petronas, and Bank Negara continue to fund U.S. educational opportunities. Many of these scholarships are however reserved for *Bumiputra* students (Malay Muslim and associated ethnic groups). Thus, students from Chinese, Indian, and other ethnic groups must find other routes for financing their studies abroad.

The Public Service Department (PSD) in Malaysia offers full scholarships to its

National Scholars for undergraduate studies at top-ranked universities around the world, including those in the United States. PSD also offers bursaries (80 percent tuition coverage) to select students for study overseas. Other scholarships include Astro Scholarship Award, Maxis What's Next Scholarship, CIMB ASEAN Scholarship, and Maybank Scholarship Program.

Mongolia. The Ministry of Education, Culture, Science, and Sports (MECSS) supports study abroad opportunities for Mongolian students. MECSS also provides partial scholarships for graduate (Master's and Doctorate) students accepted to institutions listed in the Times Higher Education Top 500 list and QS World University Rankings. According to the Mongolian Education Loan Fund, MECSS will select 60 to 70 Master's and Doctorate students for this scholarship program with funding of USD\$16,000 per year (www.mecss.gov.mn/scholarship).

Philippines. The Commission on Higher Education (CHED) has established

Fulbright-CHED Scholarships administered by the Philippine Fulbright Commission (goo.gl/SVThwF).

Singapore. Singapore has a long history of providing both government and private sector scholarships for overseas study, and these scholarships typically cover the full cost of tuition and fees plus a living stipend and airfare. These scholarships often require students to attend highly ranked universities overseas. Among the well-known scholarship programs in Singapore are the Public Service Commission Scholarship, Ministry of Defense Scholarship, A*STAR Scholarship, and Singapore-Industry Scholarship. However, dozens of other organizations offer scholarships such as the Land Transport Authority and Singapore Press Holdings (www.brightsparks.com.sg, www.scholarshipguide.com.sg).

The Republic of Korea. The Korea Student Aid Foundation provides financial assistance to students through grants, scholarships, loans, and work-study

U.S. Study Abroad

Top Five Receiving Countries in the Region

Destination	2015/16	% Change
China, People's Rep of	11,688	-8.6%
Australia	9,536	8.2%
Japan	7,145	18.0%
New Zealand	3,806	14.5%
Republic of Korea	3,622	2.9%

Five Countries (with over 100 students) with Highest Percentage Growth, U.S. Students in the Region (Five-Year Trend)

Country Name	2011/12	2015/16	% Change
Cambodia	303	594	96.0%
Philippines	273	460	68.5%
Indonesia	369	597	61.8%
Malaysia	176	279	58.5%
Thailand	1,437	2,093	45.7%

East Asia and Pacific

programs. The foundation administers the Dream Scholarship, which provides funding for academically gifted high school students who want to study abroad in full degree programs. The government has increased the number of scholarships awarded per year (www.kosaf.go.kr).

In addition, the Korea Foundation for Advanced Studies provides funding for students to study in the fields of social science, natural science, computer science, and information technology-related disciplines at the graduate level (bit.ly/KFAS-Scholarship). The Mirae Asset Park Hyeon Joo Foundation provides one year of undergraduate scholarships for exchange programs (bit.ly/MiraeAssetScholarship). And the National Institute for International Education supports students with USD\$35,000 to USD\$50,000 per year to pursue a graduate degree in the United States (bit.ly/NIIEDGradScholarship).

Taiwan. Taiwan's Ministry of Education and other Taiwan institutions provide study abroad scholarships for Master's and Doctorate degree-seeking students (www.scholarship.moe.gov.tw/).

The Foundation for Scholarly Exchange (FSE) administers the Fulbright program in Taiwan. More information about FSE, including information about funding opportunities for Taiwan students to study in the United States is available online (www.fulbright.org.tw).

Vietnam. The Vietnamese government continues to invest in higher education to meet national human resource and workforce development needs. Since 2000, the government has established an array of nationally funded scholarship programs to produce Doctorate, Master's, and Bachelor's degree holders. The Vietnam International Education Development (VIED) program under MoET manages these scholarships (vied.vn/en).

The Project 599 (2013–2020) Scholarship provides undergraduate and Master's-level training. Eligible candidates include lecturers at Vietnamese postsecondary institutions; government officials; and students who are the first, second, or third prize holders in international Olympiads and international competitions in the fields of culture, arts, and fitness or sports organized by MoET and Ministry of Culture, Sports, and Tourism. The project aims to produce

150 Bachelor's degree holders and 1,650 Master's degree holders. The United States is among the eligible destinations for students.

U.S. Study Abroad in the Region

The EAP region includes five of the top 25 destinations for U.S. students: China, Australia, Japan, New Zealand, and the Republic of Korea. China is the sixth largest recipient of U.S. study abroad students and the number one receiving country in EAP overall. However, U.S. student numbers to China have declined in recent years.

In Northeast Asia and the Pacific sub-region, U.S. students are increasingly interested in Australia and New Zealand,

as the wave of interest in Korean popular and traditional culture increases. The momentum from the 2018 PyeongChang Olympics will also contribute to this trend.

According to 2017 *Open Doors* data, Southeast Asia experienced an overall 6.4-percent increase of U.S. study abroad students to the region. Malaysia, Philippines, Cambodia, Indonesia, and Vietnam all showed increased U.S. student numbers from the previous year. Specific student interest in Malaysia included agriculture, Islamic banking and finance, and religious studies programs. Meanwhile, American students who chose to study in Indonesia predominately selected programs in the STEM fields, business,

Best and Worst Times of the Year to Interact with Students (Face to Face and Virtually)

Spring and fall are the best times to visit most countries in the EAP region. Visitors should consider the lunar calendar, religious and cultural events, and diverse academic calendars within the EAP region. Each year, the specific dates of holidays and exam periods can shift, so please check with the local EducationUSA offices or school counterparts to ensure availability and a productive outreach itinerary.

Times to avoid travel:

- Lunar New Year (February 5 in 2019) the date of this holiday changes according to the lunar calendar and the surrounding days will be a season of closures and heavy holiday travel in much of the region
- April Songkran holidays in Laos and Thailand, Chaul Chnam Khmer or Songkran in Cambodia, and Thingyan in Myanmar
- Ramadan (Fasting month) and a vacation period afterward of approximately two weeks in countries that are predominantly Muslim
- Chuseok or Autumn festival holiday in Korea and China (September 23–26 in 2018) are major closure and travel seasons
- Major exam periods for high school students in Korea in mid-spring and fall (dates vary from year to year)
- Winter break (late December through late February) in Korea for high schools, unless advanced planning and promotion can ensure an audience
- Australia
 - Mid-April (around Easter)
 - Early to mid-July
 - Late September to Early October
 - Late December to late January

and these two countries continue to expand their visibility as their governments strengthen international education offerings and engagement. Japan has had consistently strong U.S. study abroad numbers, and as host of the 2020 Olympics Games, interest in, and awareness of, Japan is expected to grow. The Republic of Korea has also emerged as a top recipient of U.S. students, which will likely continue

and the social sciences. In Vietnam, only a small number of Vietnamese HEIs have the capacity to create exchange programs for international students; therefore, short-term programs of only one to four weeks are most common. Thailand still hosts the largest number of U.S. students studying abroad in Southeast Asia and welcomed 2,093 students in AY 2015–2016.

Europe and Eurasia

Regional EducationUSA Profile

Albania, Armenia, Austria, Azerbaijan, Belarus, Belgium, Bermuda, Bosnia and Herzegovina, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Georgia, Germany, Greece, Hungary, Iceland, Ireland, Italy, Kosovo, Latvia, Lithuania, Luxembourg, Macedonia, Malta, Moldova, Montenegro, Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, Turkey, Ukraine, United Kingdom

Regional EducationUSA Profile

In Europe and Eurasia, 120 EducationUSA centers (32 comprehensive, 41 standard, 47 reference) are located at Fulbright Commissions, local non-governmental organizations, universities and high schools, American Councils offices, bi-national centers, U.S. embassies and consulates, and American Spaces. EducationUSA has advising programs in 46 countries in Europe and Eurasia and 145 advisers who continue to expand the scope and quality of services and demonstrate creative innovation in programming.

Regional Overview

Student mobility from Europe and Eurasia to the United States has increased by more than eight percent over the past five years to 92,820 students, according to the 2017 *Open Doors* report. This number represents nearly nine percent of the total number of international students studying at U.S. colleges and universities. Seventy-two percent of students from the region are studying in full degree programs at the undergraduate and graduate level. The 2017 *Open Doors* report highlights an overall increase of nearly 16 percent in the number of undergraduate students since 2013. This number represents 58 percent of the total number of degree-seeking students from Europe and Eurasia. The increase is especially noteworthy in light of the 10-percent decrease over the past five years in the population of people ages 15–24 in the region (Source: census.gov).

EducationUSA advisers actively promote U.S. community colleges to students in the region. According to the 2017 *Open Doors* report, approximately 15 percent of all undergraduate students from the region

were studying at a community college in the United States. Despite a region-wide decrease in community college enrollment of slightly more than one percent over the past five years, *Open Doors* indicates that community college enrollment has increased by 50 percent or more in Albania, Cyprus, Iceland, Italy, Luxembourg, Montenegro, Netherlands, and Slovenia. In Albania, Armenia, Moldova, Sweden, and Ukraine, the percentage of students at community colleges is one-third or more of the total undergraduate students from these countries. The community college model is attractive to students in Europe and Eurasia as a result of the relatively low cost of attendance, simplified admissions process, and Optional Practical Training (OPT) opportunities upon completion of the Associate's degree and before transferring to a four-year undergraduate program.

Student athletes are an important market among undergraduate students from Europe and Eurasia, and students from the region regularly earn athletic scholarships from U.S. institutions. Popular sports in the region include basketball, fencing, rowing, swimming, soccer, tennis, and volleyball. Southeastern Europe has traditionally been a strong sub-region for attracting student athletes, but U.S. institutions will find highly ranked student athletes throughout the region. In many cases, highly competitive athletes do not have the option to combine academic studies and their sport at the undergraduate level in their home countries, so they look to the United States for this opportunity.

The number of graduate students from Europe and Eurasia continues to decline but still makes up approximately 30

120

EducationUSA
Advising Centers
in the Region

32 Comprehensive
41 Standard
47 Reference



Europe and Eurasia

percent of the total number of students from the region in the United States. Factors influencing this decrease include population decline, the availability of quality English-language programs within the region, and the increased visibility of opportunities in Canada, Australia, and China. Countries with the greatest number of students at the graduate level include Turkey, the United Kingdom, Germany, France, and Spain. Graduate students in the region are particularly interested in science, technology, engineering, and mathematics (STEM) fields, business and management, computer science, and international relations. There is also sustained interest in Master of Laws (LLM) programs, especially in Western Europe and Ukraine. EducationUSA organizes an annual LLM tour in the region, which will be held in November 2018.

The Bologna Process, which aims to align higher education systems across Europe, makes it difficult for some European students to gain admission to U.S. graduate schools because of standard three-year European Bachelor's degree programs. Therefore, shorter programs such as semester-long exchange programs and thematic (non-English as a Second Language [ESL]) summer programs have gained in popularity over the past few years. Approximately 17 percent of students from the region are enrolled in non-degree programs in the United States, and this area is anticipated to grow over the next few years. Germany continues to be an important market for short-term programs; more than one-third

of the total number of German students in the United States are enrolled in these types of programs. Overall, programs offering only English language instruction are less popular than those offering a broader range of academic programs.

EducationUSA advisers, U.S. embassies, students, and parents recognize the benefits of cohort advising programs such as Competitive College Clubs (CCCs). These cohort programs are currently offered in Albania, Armenia, Azerbaijan, Belarus, Bosnia and Herzegovina, Macedonia, Montenegro, Portugal, Russia, Spain, Turkey, and Ukraine with a new cohort operating in Georgia beginning in January 2018. CCCs not only assist students to prepare for the admissions process but also deliver programming that helps prepare them for the U.S. classroom experience. Although CCCs are the EducationUSA network's best-known cohort programs, they are just one of many cohort advising models and programs available to students in Europe and Eurasia.

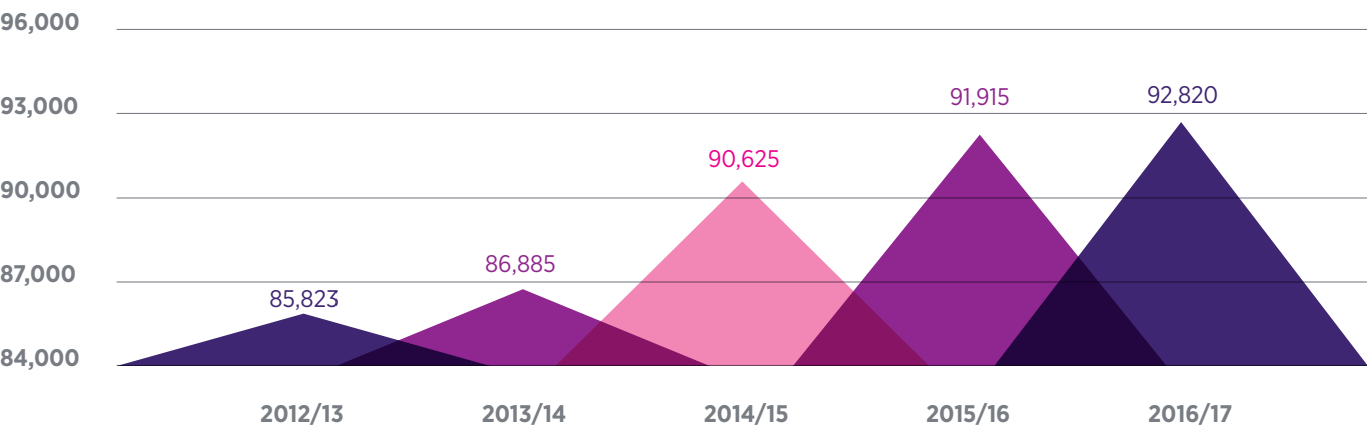
In Europe and Eurasia, the Opportunity Funds program is available to citizens and officially recognized refugees in Armenia, Belarus, Bosnia and Herzegovina, Bulgaria, Kosovo, Macedonia, Romania, Russia, Turkey, and Ukraine. The Bureau of Educational and Cultural Affairs at the Department of State offers Opportunity Funds to provide assistance to students who are academically gifted but unable to afford the costs of applying to and enrolling in accredited institutions in the

United States. Opportunity Funds cover all of the upfront costs of applying to U.S. institutions. Most students enrolled in the Opportunity Funds program who gain admission and a scholarship to an accredited U.S. institution are eligible to receive additional funding to cover visa and Student Exchange Visitor Information System fees, transportation to campus, and a modest settling-in allowance. If an institution is able to provide full funding to support one or more international student scholarships, engaging with EducationUSA Opportunity Funds cohort students is an excellent way to add talent and diversity to U.S. campuses.

Recent Trends

- In AY 2016–2017, *Open Doors* reported that 92,820 students from Europe and Eurasia studied in the United States, a record number representing a one-percent increase over the previous year and nine percent of the total number of international students worldwide. The top five countries of origin for U.S. study from Europe and Eurasia are the United Kingdom, Turkey, Germany, France, and Spain. These five countries represent 48 percent of all students in the United States from the region. Notable increases in student mobility occurred from Luxembourg (37.2 percent), Albania (10.8 percent), Italy (8.5 percent), Spain (7.9 percent), Ukraine (8.2 percent), Romania (6.2 percent), and Lithuania (5.7 percent). In AY 2016–2017, 26 of the 46 countries in Europe and Eurasia experienced positive growth in student mobility to the United States.

Student Mobility in the Region (Five-Year Trend)



- The major concern for students and parents from the region continues to be the cost of studying in the United States. Many families recognize that education is an important, and often expensive, investment, and are attracted to schools and programs that provide a return on that investment. Obtaining work experience in the major field of study is difficult for students completing education in their home countries or elsewhere in the region, so participation in OPT is a major draw when considering studying in the United States. The number of students from the region enrolled in OPT has increased by more than 29 percent over the past five years and is expected to continue growing as current degree-seeking students complete their studies.

- High-profile economic and political challenges in the region, especially in Greece, Russia, Turkey, and Ukraine, have not adversely affected student mobility. Instead, they often serve as a push factor for students to study in the United States. Many local currencies have fallen significantly versus the dollar in the region over the past five years, even as student mobility numbers have remained stable or even increased. For example, over the past three years, the Russian ruble lost 85 percent of its value against the dollar, and the Turkish lira lost 62 percent of its value (Source: Bloomberg Bloomberg Markets). Despite this, the number of students in the United States from those countries has remained nearly the same. In addition, the economic crisis in Greece did not negatively affect the number of Greek students pursuing their higher education in the United States. In fact, the United States has seen a 40-percent increase in the number of undergraduate degree-seeking students from Greece over the past five years. Ukraine also saw a 22-percent increase in students coming to the United States during the same time period.

- A growing number of parents are seeking better education opportunities for their children from an earlier age and are actively considering high school study abroad options. Throughout the region, EducationUSA advisers are regularly asked about boarding schools in the United States at events and in consultations, with notable interest from parents in Austria, Czech Republic, Denmark, Germany,

Hungary, Russia, and Ukraine.

- Pre-college summer programs are attractive for high school students and their families in the region as a means to prepare students for gaining admissions to U.S. institutions. Parents and students are looking for programming opportunities beyond English language instruction, though perfecting English language skills is a major focus for most students who participate in these programs. Although still a relatively new model, the EducationUSA Academy is gaining in popularity in the region. In the 2017 admissions cycle, 35 of the 135 total participants came from Europe and Eurasia. Many U.S. embassies in the region recognize the importance of pre-college summer programs, and a number of U.S. embassies in the region provide scholarships to support academically talented students. Many of these students come from low-income families, are minorities, or have no prior experience in the United States, and many are active members of cohort advising programs. Students also participate with funds from their family resources or external foundations. Students from Armenia, Austria, Azerbaijan, Bulgaria, Belgium, France, Georgia, Greece, Hungary, Luxembourg, Montenegro, Poland, Romania, Russia, Spain, Turkey, and Ukraine have participated in previous EducationUSA Academies.

- Students and their parents are increasingly focused on STEM education at the high school level throughout the region. In 2017, some high schools in Bosnia and Herzegovina introduced classes in robotics and coding, and Georgia implemented a national strategy to increase STEM education. All American Spaces in Europe and Eurasia now offer Makerspace programs for students, entrepreneurs, and citizens to have access to modern tools to design, build, and manufacture products. U.S. universities can expect STEM fields to remain a strong focus for students from Europe and Eurasia in the years to come.

Countries in the Spotlight

Albania. The number of Albanian students studying in the United States has risen more than 20 percent over the past five years. In Europe, Albania has the highest proportion of students ages 15–24, more than 17 percent of the total

population of Albania. The government is very supportive of Albanian students studying overseas and encourages alumni who have studied abroad to work for the government or to teach at public universities in Albania.

There are two EducationUSA advisers at the EducationUSA center in Tirana, Albania. The advisers work with 35 CCC students annually. U.S. university representatives are encouraged to get involved with the CCC students and engage with them virtually or in-person. More than 30 percent of students that visit the advising center in Tirana have expressed interest in 2+2 programs, and over the past five years, the number of Albanian students studying at community colleges in the United States has doubled to almost 150. Albanian students attract financial aid, and their parents are able to contribute significantly to their children's education. Albanian students are particularly interested in graduate studies, and there has been a 17-percent increase in students enrolled in graduate programs over the past year. Business, computer science, and engineering are among the most popular fields of study for students. Alumni are invited to participate in the alumni fair, which takes place in May. Albania will also be added as a new stop to the 2019 Southeastern Europe Tour.

Belarus. The EducationUSA team for Belarus, located in Vilnius, Lithuania, conducts extensive virtual outreach and programming for students in Belarus, which includes CCC and Opportunity Funds cohorts. Although options for in-country engagement for the U.S. higher education community continue to be limited, the EducationUSA team made significant progress in 2017 connecting with key stakeholders, local education contacts, and students in Belarus.

One of the most notable events in 2017 was a workshop for Belarusian university administrators on building the capacity to host American study abroad students. The workshop was conducted in Vilnius and included 25 Belarusian educators, representatives from the Ministry of Education in Belarus, the U.S. Embassy in Minsk, and the Charge D'Affaires of the Belarusian Embassy in Vilnius. This workshop was the first time such high-level Belarusian government officials actively supported and participated in an

Europe and Eurasia

EducationUSA workshop. It was the first of many workshops being planned for Belarusian university administrators and the Ministry of Education. U.S. HEIs are especially encouraged to collaborate with EducationUSA and local institutions in Belarus on projects that foster U.S.-Belarus partnerships for student and faculty exchanges, dual-degree programs, and study abroad programs for Americans.

Since early 2017, U.S. citizens and those from 79 other countries have been able to travel to Belarus for five days without a visa, which makes it significantly easier for U.S. higher education representatives to travel to the country for recruitment purposes. This visa-free travel option, in addition to the success of the capacity-building workshop with Belarusian university administrators, prompted EducationUSA Belarus to organize the inaugural U.S. Higher Education Fair in Minsk as part of the 2018 EducationUSA Eurasia and Baltics Tour. Previously, the only opportunity Belarusian students had to meet with U.S. HEIs was to travel to higher education fairs in neighboring countries. The EducationUSA Fair in Minsk is expected to generate significant interest in the United States among Belarusians.

Another positive recent development was the U.S. Embassy Minsk's recent announcement that it is issuing all categories of non-immigrant visas, including F visas. Belarusian students often traveled to Moscow in the past for their student visa interviews. This policy change eliminated one of the largest obstacles for Belarusian students who want to access U.S. higher education, and

EducationUSA is now actively informing students and their families of this important change.

Belarusian student mobility to the United States has been relatively steady every year. According to the 2017 *Open Doors* report, 319 students from Belarus studied in the United States in 2017. Belarusian students are particularly interested in graduate studies, and there was a 5.7-percent increase in the number of students enrolled in graduate programs over the previous year. The business and information technology (IT) sectors continue to be popular majors at both the graduate and undergraduate levels, but international relations, law, marketing, and the arts are also gaining popularity.

Croatia. The government of Croatia has a strong commitment to increasing student mobility and developed a policy to increase both inbound and outbound student mobility by at least 20 percent by 2020. Croatia is interested in developing partnerships with U.S. universities for study abroad programs for U.S. students. In addition, the number of U.S. study abroad students in Croatia has more than doubled since 2012 to more than 400 students. The EducationUSA team in Zagreb, which is hosted by the Institute for Development of Education, continues to work with several key stakeholders on developing innovative programs aimed at increasing student mobility.

In 2017, EducationUSA successfully organized a one-day expert seminar on internationalization and the

development of study abroad programs between Croatia and the United States. The seminar was supported by the Croatian Ministry of Science and Education and the Agency for Mobility. Stakeholders from Croatian HEIs, ministries, and agencies who work in the field of internationalization and academic mobility attended the seminar. Speakers from the Croatian Ministry of Science and Education, Agency for Mobility, Agency for Science and Higher Education, and representatives from the Croatian higher education community shared their best practices on study abroad initiatives developed with U.S. universities.

EducationUSA advisers in Zagreb will continue to work on new and innovative programs in 2018 to establish more university partnerships between Croatia and the United States and increase both inbound and outbound student mobility. Regarding outbound student mobility, Croatian interest in undergraduate studies is increasing, and there has been a 3.7-percent increase in Croatian students enrolled in U.S. undergraduate programs over the past year. Business, engineering, international relations, and diplomacy are among the most popular fields of study for Croatian students.

The United Kingdom has increased its recruitment efforts in Croatia over the past year. Nevertheless, the number of outbound students in Croatia who have chosen the United States as their study abroad destination is twice the number of students who selected the United Kingdom. A great way to meet

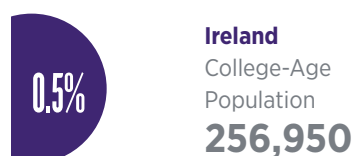
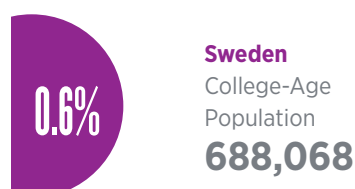
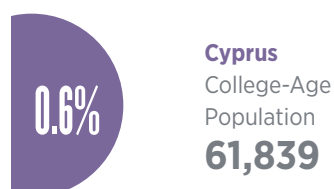
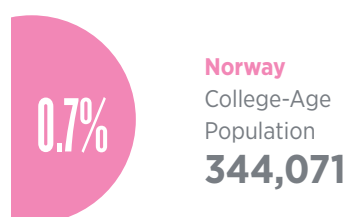
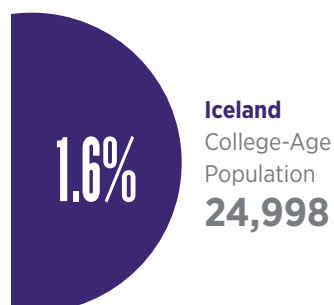
Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students in the Region (Five-Year Trend)

Country	2012/13	2016/17	%Change
Kosovo	106	244	130.2%
Spain	5,033	7,164	42.3%
Luxembourg	87	118	35.6%
Netherlands	1,948	2,551	30.9%
Italy	4,276	5,593	30.8%

130.2%

Kosovo has the largest percentage growth in the region over the last five years (*with over 100 students*)

Five Countries of Origin in the Region with Highest Per Capita College-Age Student Mobility to the United States



Source: UNESCO Institute of Statistics; Indicator: 2015 Population of the official age for tertiary education, both sexes

prospective students in Croatia is to attend the EducationUSA Southeastern Europe Fair in April, the Higher Education and Scholarships Fair in October, or the EducationUSA LLM fair in November.

Germany. Germany has an excellent and largely tuition-free system of higher education. The past few decades have seen a steady rise in private institutions: 117 of the 396 registered institutions of higher learning are private and fee-based. Students within this diversified and growing system can receive generous support to study abroad, including study in the United States.

Experience abroad is considered a key advantage for students, particularly in the fields of law, economics, business, medicine, and the social sciences. An increasing number of students, however, favors short-term programs or internships as a result of the high costs associated with study in the United States. In AY 2016–2017, 42.5 percent of German students participated in non-degree programs or OPT internships. Although the Bologna Bachelor's/Master's system allows for study or work abroad, the process has shortened the time in which a student is expected to finish a degree. International programs that combine both study and practical training are particularly appealing to these students.

Currently, one-third of all German students spends time abroad during their studies. The Federal Ministry of Education and Research aims for that number to increase to more than 50 percent by 2020. The European Union (EU)-sponsored Erasmus+ program is very popular and has contributed to the majority of German students staying in Europe for their study abroad experience. The United States remains, however, the number one destination outside of Europe with 10,169 German students currently enrolled in U.S. institutions. There are a number of financial support opportunities for German students seeking non-degree programs at U.S. HEIs. In addition to the German Academic Exchange Service (DAAD) and the German Fulbright Commission, German universities maintain more than 2,200 partnerships with U.S. universities. As there is almost no government financial support available from the German government

for full degree programs, students often look to U.S. institutions for merit and sports scholarships.

Although limited in scope, there is also a significant market for gap-year options for students younger than 18 who are interested in programs that provide an overview of various fields of study including business, language, and intercultural training courses. Secondary school students in a vocational track (ten general school years plus two to three years of practical training) find the flexible U.S. community college system appealing, as there is no German equivalent. Professional Master's programs, such as LL.M.s, also tend to be popular among German students. Each year, Germany sends approximately 20,000 J-1 participants to the United States. This includes large numbers of high school exchange students and au pairs who are often keen to continue their education in the United States.

Lithuania. In 2017, TAMO, the country's largest online school survey, polled 1,243 students in grades 9–12 on their attitudes toward emigration. Of the students polled, 77.6 percent indicated they intended to emigrate either for work or study. The survey prompted concern among authorities as the country's population decline has accelerated since joining the EU in 2004. In the past five years alone, the population age 15–24 has declined by 146 percent (Source: census.gov). To increase the quality and competitiveness of Lithuanian higher education, the government enacted a series of reforms to consolidate HEIs in the country from 14 to eight (Source: The Times of Higher Education). The plan

Regional Student Totals Top Five Countries of Origin

Country	2016/17	% Change 2015/16
United Kingdom	11,489	-0.9%
Turkey	10,586	-1.0%
Germany	10,169	0.2%
France	8,814	0.6%
Spain	7,164	7.9%

Europe and Eurasia

aims to focus on STEM fields and reduce the number of majors offered from 1,800 to 700. This reduction in available degree programs is expected to be a push factor for students who want to study abroad.

Establishing personal connections with students is an effective way to recruit in Lithuania, yet few U.S. HEIs travel to the region or have any region-specific online marketing efforts. Each year, EducationUSA advisers participate in the annual “Days of International Education (STUDIES)” fair, the largest education fair in the Baltics which reaches close to 40,000 students and parents from the entire region. EU institutions are active participants in the STUIDES Fair as well as other international education fairs in the country, yet U.S. schools are noticeably absent. U.S. institutions interested in recruiting students in Lithuania should consider participating in the EducationUSA U.S. Higher Education Fair on October 30, which is part of the 2018 Eurasia and Baltics Tour. Institutions that cannot travel to the region should engage all U.S. study abroad students, alumni, current Lithuanian students, professors, and staff traveling or living in the region to further their outreach efforts to students in Lithuania.

UNESCO’s student mobility data shows that close to 12,000 Lithuanians are currently pursuing educational opportunities outside of the country, roughly 41 percent of whom are studying in the United Kingdom. Lithuanians are closely watching developments around Brexit with regard to continued access to educational opportunities. Should study in the United Kingdom become more difficult, it is likely that many of those students would look to opportunities in the United States. The United States is the seventh most popular destination for students from Lithuania. Countries that offer English language education with competitive tuition fees include Denmark, Poland, Netherlands, Germany, and Russia. However, American higher education is gaining in popularity among students and parents. According to the 2017 *Open Doors* report, the number of Lithuanian students in the United States has increased by 17 percent to a total of 333 students. The U.S. Embassy in Vilnius is actively fostering this positive mobility to the United States and has started to prioritize outreach to niche populations in the country such as student athletes and musicians for undergraduate

admissions, and students returning from U.S. summer work and travel programs for graduate studies.

Luxembourg. In 2017, the number of Luxembourgish university students in the United States increased by more than 37 percent from the previous year to a total of 188 students. In the coming years, EducationUSA programming initiatives such as the administration of the Luxembourg College Night, EducationUSA school outreach visits, and scholarships for the EducationUSA Summer Academy program are factors that will help increase interest in study in the United States.

Brexit in the United Kingdom could potentially increase the competitiveness of U.S. HEIs, and Luxembourg’s affluence and significant government support for university studies will remain push factors for mobility to the United States. In 2017, close to 20 U.S. HEIs and more than 450 students, parents, and administrators attended the inaugural Luxembourg College Night. The 2018 College Night is scheduled for October 4. It will be expanded to accommodate as many as 40 institutional representatives.

Many of Luxembourg’s students see their future in areas where U.S. universities excel: biomedical innovation, IT, aerospace, financial systems, and other STEM fields. Degrees from American universities are recognized and respected by Luxembourgish employers, and more than 100 U.S. companies have their European headquarters in Luxembourg including Amazon and Goodyear. Other companies, such as Google, are reportedly considering significant investments in Luxembourg.

With fewer than 50 public and private high schools in the country, direct recruitment and establishment of meaningful institutional connections are the key for success in Luxembourg. Prioritizing quality interactions over several years will establish name recognition for HEIs and will demonstrate to students, parents, and school administrators the kind of steady commitment that has significant cultural value.

The University of Luxembourg was established in 2003. Prior to its establishment, Luxembourgish students had to study abroad for most of their higher education needs. According to the Organization for Economic Cooperation

and Development (OECD), Luxembourg is in the top five countries for completion of higher education degrees in the 25–34 and 35–44 age ranges, so there is a long-standing dedication to higher education in the country. Historically, the neighboring countries of Belgium, France, and Germany have absorbed the largest numbers of students leaving Luxembourg in pursuit of a university degree. In the past several decades, however, the United Kingdom, the Netherlands, and Canada have proven to be popular destinations for students from Luxembourg as well.

For most U.S. HEIs, Luxembourg represents an engaged population of well-prepared students who speak English well and are enthusiastic about the United States. From a young age, Luxembourgish children learn in multiple languages with exceptionally diverse classmates. English is part of the basic curriculum from age 12 and most students in Luxembourg finish high school fluent in four languages: Luxembourgish, German, French, and English.

In addition to its affluent population, Luxembourg has the highest public spending per student among all OECD countries. Every student resident of Luxembourg is eligible to receive financial support for higher education studies. Depending on the family’s financial circumstances, the level of annual support ranges from USD\$5,000 to USD\$14,000 and is provided in the form of grants and minimal interest (0.2 percent) loans with generous repayment provisions. Students can use this financial support for a study abroad experience, depending on the financial situation of the student’s family. The Centre de Documentation and Information sur l’Enseignement Supérieur (CEDIES) is the governmental agency that oversees this program, and is where the EducationUSA office is located.

Ukraine. As a result of the ongoing conflict in parts of eastern Ukraine and the situation in Crimea, the Ukrainian Ministry of Education has implemented measures for university and high school students in the affected regions to receive officially recognized academic credentials and alternative education options. Any student who completed secondary education or university in 2014 or earlier from an institution in the Donetsk, Luhansk, and Crimea regions can request their academic credentials

through a formal application process from the Ministry of Education. Beginning in 2014, 18 Ukrainian HEIs relocated from the Donetsk, Luhansk, and Crimea regions and are operating on the territory controlled by Ukrainian authorities. Since 2016, elementary and secondary students still living in the affected regions have been able to complete their education through the ministry's E-school program, called "Distance Education in School" (eschool.dn.ua). Those finishing the high school program receive an officially recognized attestation called "ATESTAT", allowing them to enroll in HEIs in Ukraine and abroad.

When reviewing academic credentials from Donetsk, Luhansk, and Crimea, U.S. university representatives should be aware that institutions bearing the names of the relocated institutions continue to operate in the affected regions. The Ukrainian Ministry of Education revoked the education licenses and accreditation for institutions still located and operating within the conflict zones, specifically including those in the cities Donetsk, Luhansk, Horlivka, Alchevsk, Makiyivka, and all that are located on the Crimean Peninsula. Diplomas from these "doppelgänger" institutions are not recognized as legitimate academic credentials in Ukraine and can be identified by the use of Russian as the original language on the transcript. All documents recognized by the Ministry of Education must be in Ukrainian. U.S. higher education representatives are encouraged to contact EducationUSA Kyiv for further information and assistance to determine which institutions are authorized to operate and issue academic credentials in Ukraine.

Even with the ongoing conflict in the country, EducationUSA continues to provide services to internally displaced students from these regions and virtually to those still living in the conflict zone. The U.S. embassy is eager to reach as many students as possible beyond Kyiv, and, for the first time this fall, EducationUSA will host a U.S. Higher Education Fair in Odesa in addition to the annual fair in Kyiv. Overall, student mobility from Ukraine has grown by 22 percent over the past five years and is currently at 1,817 total students. This increase is especially noteworthy in light of the 35-percent population decline in 15–24-year-olds (Source: census.gov)

over the past five years and currency devaluation by 232 percent compared with the U.S. dollar over the past three years (Source: Bloomberg Markets). The largest growth has been among undergraduate degree-seeking students, which has seen an increase of 35 percent over the past five years (Source: 2017 *Open Doors* report).

What to Expect in the Next Three to Five Years

- In Europe and Eurasia, ministries of education and academic institutions are expected to continue prioritizing the establishment of institutional partnerships and support efforts to increase American study abroad to their countries. Many EducationUSA centers and local education partners administer workshops and other events to promote and achieve greater student mobility in both directions.
- Many experts predict that Brexit will prompt the United Kingdom to significantly revamp and increase its

recruitment outreach efforts around the world, and particularly in Europe and Eurasia. Developments around Brexit will influence study abroad decisions for both students in the United Kingdom and students from within the EU. Although there is no evidence that UK students are less interested in studying abroad, a possible explanation for the decrease in their numbers to the United States is that UK universities have heavily promoted the European exchange program Erasmus+. With the uncertainty surrounding Brexit, British students may be choosing to study abroad in Europe "while they still can." If UK universities are unable to accommodate students from the EU, either through Erasmus+ or degree programs, this may open significant opportunities for U.S. universities to establish study abroad partnerships in the medium and long term.

The UK government has also made significant changes to high school

U.S. Study Abroad

Top Five Receiving Countries in the Region

Destination	2015/16	% Change
United Kingdom	39,140	2.50%
Italy	34,894	3.30%
Spain	29,975	5.80%
France	17,214	-5.40%
Germany	11,900	8.10%

Five Countries (with over 100 students) with Highest Percentage Growth, U.S. Students in the Region (Five-Year Trend)

Country Name	2011/12	2015/16	% Change
Serbia	51	179	250.0%
Iceland	254	688	170.9%
Portugal	211	523	147.9%
Estonia	63	151	139.7%
Lithuania	66	154	133.3%

Europe and Eurasia



qualifications, which affect students in England, Wales, and Northern Ireland applying to U.S. universities. These changes will affect the academic qualifications awarded for the completion of high school, referred to as the AS, A, and General Certificate of Secondary Education levels, which will impact students from the United Kingdom in different ways. The UK government will provide additional clarification about these changes in the coming months.

- Russia, China, and Turkey are increasing the number of scholarships they offer to European students and are expected to continue attracting students from the region with these opportunities. Both Russia and China are actively recruiting throughout the region, and many of the programs they offer include one year of language preparation classes before

students begin academic studies. HEIs across the region are also offering more degree programs in English and actively recruiting students from the region, and from other countries with large numbers of international students, such as China.

- The U.S. government recently launched the Future Leaders Exchange (FLEX) program, a one-year placement at an American high school, in Estonia, Latvia, Lithuania, Poland, and Romania. The first alumni cohorts returned to their home countries in 2017. The Bureau of Educational and Cultural Affairs (ECA) at the Department of State funds the program and American Councils for International Education administers it. FLEX alumni are academic achievers and possess the skills to become community leaders and cultural ambassadors in their home countries. They are ideal candidates

for admission to U.S. HEIs and to promote U.S. education to their peers. As the number of alumni cohorts grows, EducationUSA expects interest in U.S. higher education to increase in these new FLEX countries. In the broader region, FLEX programs are also located in Armenia, Azerbaijan, Georgia, Moldova, Montenegro, Serbia, and Ukraine. The Kennedy-Lugar Youth Exchange and Study (YES) program, a similar high school exchange program available to students from Albania, Bosnia and Herzegovina, Bulgaria, Kosovo, Macedonia, and Turkey, is another ECA-funded program that supports bright young students at the high school level who are well positioned to succeed in U.S. higher education.

- With Norway's economy closely tied to world oil prices, the number of Norwegians studying abroad increases or declines with the value of oil. In 2018, the Norwegian government will produce a white paper on Norwegian student mobility. The paper aims to establish a strategy for how to increase the number of students studying abroad. It will likely affect both funding opportunities and authorization of certain degrees (e.g., medical licenses). In addition, the higher education system in Norway has recently been restructured, and public universities and colleges have merged to centralize academic communities. This change will likely lead several universities and colleges to renegotiate study abroad agreements and to seek new partnerships.

Virtual and Social Media Usage

EducationUSA advising centers in Europe and Eurasia incorporate a variety of social media platforms to interact with prospective students and alumni and to conduct effective outreach in the region. There are no technical issues or bandwidth constraints regarding any of these platforms, as internet connectivity is very stable, reliable, and inexpensive throughout Europe and Eurasia. The following list highlights the most prominent social media platforms.

- Facebook is by far the most popular social media platform used in the region and is essential to reach target audiences in some countries. EducationUSA Belarus, for example, has

a community of nearly 14,000 members. All members are vetted and verified to be from Belarus. VKontakte also remains an extremely important platform for the Russian-speaking communities in the region. EducationUSA Bosnia also has a wide community of 11,000 members who receive daily updates on upcoming events and higher education news.

EducationUSA advising centers promote videos with their alumni on their Facebook pages to share success stories and inspire new audiences. EducationUSA Montenegro and Macedonia work closely with their alumni studying in the United States to create short #20questions videos that they then share on their respective U.S. embassy Facebook pages to generate more interest. EducationUSA uses some of the videos as a promotional tool for the Southeastern Europe Tour scheduled in the fall. EducationUSA alumni and U.S. HEIs are encouraged to continue sharing these videos, which are an engaging, free recruitment tool for students in the region.

- EducationUSA Armenia, Azerbaijan, and Macedonia have regularly used Facebook Live to share their in-center and outreach events, and this platform has expanded the reach of traditional webinars. Advising teams in other countries are also starting to experiment with this platform, and U.S. higher education representatives should consider doing country-specific Facebook Live sessions in coordination with EducationUSA.
- Although “live” webinars in Europe and Eurasia have waned in popularity in the region over the past few years, EducationUSA advisers still regularly use webinars when working with specific audiences. EducationUSA advisers encourage U.S. higher education representatives to provide thematic content for cohort students, such as inviting professors to speak about popular majors on campus, career services to speak about career planning and major selection, and current international students from the target region or country to lead an informal webchat. Webinar recordings are an effective way to reach students, especially if they cover topics related to university admissions (e.g., The

Common Application, essay writing). One example of such targeted programming in the region is EducationUSA in Bosnia and Herzegovina. The advisers work with all six American Spaces across the country and incorporate webinars in their programming as an efficient outreach tool, not just for students but for teachers as well. EducationUSA Kyiv also hosts weekly presentations at America House, which are broadcast throughout the country. Visiting U.S. higher education representatives are welcome to join these sessions as guest speakers. U.S. HEIs interested in engaging virtually should contact EducationUSA advisers in their target countries to learn about upcoming programming they can join or for recommendations on format and content to reach their target audience.

EducationUSA advisers in Europe and Eurasia participate in monthly webinars as part of their ongoing professional development with REACs and their peers. HEIs interested in being guest speakers should contact the REACs for Europe and Eurasia.

- EducationUSA in Armenia, Azerbaijan, Belarus, Spain, Georgia, Russia, Albania, Bosnia and Herzegovina, Ukraine, Sweden, Norway, and Poland actively use Instagram to connect with audiences by highlighting in-center events, outreach trips, adviser participation in U.S.-based conferences and training, and student success stories. EducationUSA advisers are eager to show images from U.S. campus life to local student audiences as well. For example, Virtual Student Foreign Service e-Interns working with EducationUSA Armenia feature on the feed one institution per week that uses the interns’ content about campus life and other student experiences available in the United States.
- The Belgian and Luxembourg Fulbright Commission runs a very popular YouTube channel that features instructional videos as well as interviews with students, Fulbright grantees, and representatives of U.S. universities. Centers in Belarus, Czech Republic, Russia, and Ukraine also have active channels where they livestream events, include short instructional videos, and

feature interviews with EducationUSA advising alumni. The Russian language content produced by Belarus and Russia is shared throughout the Russian-speaking world.

- Snapchat is becoming increasingly popular, especially with younger audiences. In Sweden, for example, a student corps of high school students who are proficient with that platform manage the advising center’s Snapchat account and reach hundreds of students to promote upcoming fairs and events. This platform is also popular with younger students in Germany.
- U.S. HEIs are encouraged to send short social media video content or attractive and unique highlights for advisers to share on social media. Examples include interviews, video or blog testimonials by current students from the target country, or other connections the institutions have such as professors from the country, courses or majors related to the region, and study abroad students visiting the country. Students are also interested in learning more about the communities where U.S. institutions are located, so videos featuring how international students live and study in the community are effective.

Successful Recruiting Strategies

- Alumni fairs have become popular events for promoting U.S. higher education. They display the diversity of institutions and the students who study at them and introduce potential applicants to institutions that are otherwise not actively recruiting in the region. Albania, Armenia, Azerbaijan, Georgia, Romania, Serbia, Macedonia, and Ukraine host annual events each spring. Estonia and Russia also began hosting annual alumni fairs in 2017 and Moldova will host an alumni fair for the first time in May 2018. Other countries are expected to add alumni fairs in the near future. Local alumni and American alumni at these locations are welcome to participate and volunteers often include Peace Corps Volunteers, Fulbright English Teaching Assistants, study abroad students, and U.S. diplomats. Best practices include providing training to alumni on how to represent their institution effectively and mailing promotional materials to the advising center for distribution at the event.

Europe and Eurasia

- Students outside capital cities in Europe and Eurasia rarely have the opportunity to meet with U.S. higher education representatives in person, making the extensive outreach outside capitals that EducationUSA advisers conduct all the more valuable. EducationUSA advisers can provide guidance on untapped destinations to visit in their countries and can often assist with organizing presentations at regional schools, universities, American Spaces, or youth centers. Depending on their travel budget, they might also be available to travel with U.S. higher education representatives to certain destinations. EducationUSA advisers also organize or participate in higher education fairs in regional cities and welcome U.S. HEIs to join them.
- Emphasizing internships and career advising services is essential during the recruitment process. Present long-term study plans to students, including OPT opportunities. Explain how the university provides support to students to identify OPT and internship opportunities and use alumni profiles as success stories to reinforce this message.
- The current generation of students loves to travel, and students in Europe and Eurasia are likely to already have had a study abroad or international travel experience before starting their education in the United States. These students are attracted to options that allow for short-term study abroad or internships while pursuing their degrees in the United States, and institutions should highlight benefits and opportunities their campuses offer during the recruitment process.
- Many students in Austria and the Czech Republic, in particular, participate in ESL-focused high school exchange or post-high school gap years, creating a market for community colleges willing to market themselves as a gap year option.
- The region is becoming increasingly diverse, especially the major cities. For example, ten percent of all young people in Norway (and 25 percent in Oslo) have a family background from Asia, Africa, the Middle East, South America, or Turkey. When engaging these students, universities should highlight the diverse nature of their campuses and plans to achieve greater inclusion.
- Students in the region tend to think about their higher education options much later than in the United States, so American HEIs should start promoting undergraduate programs to students in their sophomore year of high school and not just to junior and senior students. As many students in the EU are now completing their Bachelor's degree in three years, graduate programs should consider targeting current university students in their sophomore year of studies.
- Secondary-level educational systems in Europe and Eurasia have vocational and university tracks for students, usually starting with the ninth grade. In Southern Europe, local governments have started to place more emphasis on vocational programs as a means to address high youth unemployment. By developing a strategy for accommodating students on the vocational track, U.S. HEIs can have access to a population that is generally underrepresented in student mobility to the U.S.
- Many European and Eurasian students participate in gap year programs and mandatory military service after graduating from secondary school. In Sweden, for example, only 12.8 percent of all Swedish high school graduates start university immediately after they graduate. U.S. HEIs should engage with gap year program providers to meet with students in addition to recruitment efforts for students in secondary school.
- For universities interested in recruiting in Wales, the Welsh government set up the "Seren" network to open opportunities for the top ten percent of Welsh state school students. "Seren", meaning *star* in Welsh, has a network of 11 hubs that make reaching qualified students at several schools easier. They also hold a two-day conference in December at which universities can recruit students. Seren offers an excellent and efficient opportunity for U.S. universities to recruit Wales' best students.
- All Bermudian students must leave the country if they want to achieve a degree higher than the an Associate's degree. U.S. HEIs are encouraged to develop 2+2 partnerships with Bermuda College to support these students.

Foreign Government and Private Funding

EducationUSA advisers stay abreast of new and evolving scholarship programs in their countries. Although this list is as comprehensive as possible, higher education professionals are encouraged to contact advisers in the countries of interest to learn more about these programs and others as they are announced.

Erasmus+. Launched in 2014 as the EU's reorganized flagship suite of international education and student mobility programs, Erasmus+ provides a wide-range of opportunities to European and non-European students, educators, and administrators (ec.europa.eu/programmes/erasmus-plus/node_en). One of the program's goals is for four million participants to study abroad by 2021. Signature initiatives include Jean Monnet Activities to promote worldwide teaching and research; Horizon 2020, which provides billions of euros for research and innovation; Marie Curie Fellowships, which are awarded to individual researchers; and other offerings. All EU countries have Erasmus+ program administrators at the national and institutional levels who can provide additional information about how U.S. institutions can participate in these programs.

Fulbright. There are 23 Fulbright Commissions across Europe, each with its own program offerings (www.eca.state.gov/fulbright). In addition to the commissions, Fulbright awards are available in each country in Europe and Eurasia. The U.S. embassy websites provide more details on funding levels and eligible candidates.

Albania. The Excellence Fund for Albanian students, supported by the Ministry of Education, is a financial aid opportunity for students admitted to one of the top 15 (global) universities as determined by the Times Higher Education ranking. Students are able to qualify if they have earned a scholarship of 75 percent or more to any accredited university in the United States, and the maximum amount is 8,000 euros.

Armenia. More than 15 private foundations provide scholarships for Armenians to study in the United States (www.educationusa.state.gov/centers/yerevan-american-councils).

Baltic-American Freedom Foundation. The Baltic-American Freedom Foundation

funds citizens of Estonia, Latvia, and Lithuania to participate in educational and exchange programs centered on economic growth and democratic processes. Funding is available for research and internships in the United States, with awards ranging from USD\$30,000 to USD\$60,000.

Belgium. The Belgian American Educational Foundation provides scholarships for graduate studies and the Fernand Lazard Foundation offers interest-free loans. Students looking to spend a year at a U.S. university as part of their doctoral studies often receive financial support from their home institution in Belgium or from organizations such as Research Foundation - Flanders.

Bermuda. Bermuda has a comprehensive website for information on available scholarships (www.bermudascholarships.com). All private and government-funded opportunities for Bermudians are listed on this site.

Czech Republic. There are several private foundations that offer scholarships for study abroad: Bakala Foundation Scholarship (www.bakalafoundation.org), the Kellner Family Foundation University Scholarship (www.kellnerfoundation.cz), and the Krsek Foundation Scholarship (www.krsekfoundation.cz). Amounts for these scholarships vary, but all programs provide support of as much as USD\$30,000.

Denmark. The State Educational Grant provides generous support to Danish students to participate in a “youth education program” after secondary school. They are generally similar to gap year programs, and students already enrolled in an institution of higher education can participate (www.su.dk/english/state-educational-grant-and-loan-scheme-su/).

France. The French government gives grants only to students who are going to study through exchange programs at the undergraduate level. The Monahan Foundation gives as much as approximately USD\$50,000 for Master’s or a Ph.D. in STEM fields.

Ireland. The Irish Research Council provides support to researchers across all disciplines (research.ie/).

Macedonia. The Ministry of Education and Science awards academic scholarships to students accepted to a top-ranked university (according to the Center for World-Class Universities). The scholarships are restricted to several fields and the maximum award is USD\$40,000 per year for tuition costs, airfare, and a monthly stipend.

Moldova. The Western NIS Enterprise Fund (WNISEF) offers a seed grant program that provides financial support to managerially-talented students from Moldova who are admitted to one of the top 50 Master of Business Administration (MBA) programs in the United States (according to *U.S. News & World Report* full-time MBA program rankings) and are committed to investing their talents in Moldova.

Netherlands. *Studiefinanciering DUO* is a low-interest student loan for undergraduate and graduate study for Dutch students. The number of years one qualifies is limited, and it is only transferable to an institution abroad if both the HEI and program are approved as offering content and quality similar to programs offered in the Netherlands (www.duo.nl). Several foundations offer funding for prospective graduate students to the United States, including Prins Bernhard Cultuurfonds, VSB-fonds, and Vrijvrouwe van Renswoude (www.beursopener.nl). *Fondsenboek* is a printed resource with an up-to-date overview of all Dutch foundations, and Holland Scholarship is for undergraduate

and graduate students for short-term educational travel abroad (www.nuffic.nl/en/scholarships/holland-scholarship).

Norway. Norwegian students enjoy one of the most generous public financial aid programs in the world. The Norwegian government, through the State Educational Loan Fund, *Lånekassen*, provides non-merit-based financial aid for Norwegian students studying in the United States through a loan/grant package. Most of the funding is given as a loan, and most Norwegians who are eligible to enter university are also eligible to receive support from the program. The funding is for students in full-time academic programs at both the undergraduate and graduate levels. The loan/grant package depends on a variety of factors and criteria. Students studying at 56 highly ranked universities are eligible for an additional NOK 70,000 in grants. There are also private foundations with large funding opportunities for graduate studies in the United States including the Norway-America Association, Aker Scholarship, Eckbos Legat, Jansons Legat, and others.

Serbia. The Ministry of Youth and Sports awards graduate scholarships for overseas study based on enrollment at institutions that are ranked on the “Shanghai Ranking” as a top 500 institution. The ministry also awards scholarships for designated performing arts schools around the world (www.fondzamladetalente.rs).



Europe and Eurasia

Slovenia. The Slovenian government continues to offer various scholarships for study abroad. The most generous is the Ad Futura scholarship through which students receive as much as USD\$37,000 annually for the duration of their academic program. This scholarship program funds undergraduate studies in STEM fields or graduate studies in all fields except the fine and performing arts. For AY 2017–2018, approximately USD\$3.7 million was available, and 82 out of 160 students who applied were awarded scholarships. The same amount is expected to be available for AY 2018–2019. In subsequent years, the number of awards will depend on the amount of funding available and the financial need of the selected students (www.srips-rs.si). The Ministry of Culture awards other generous scholarships to undergraduate and graduate students of fine and performing arts, cultural management, and other fields.

Sweden. The Swedish Board of Student Finance is the government's academic financial aid program. It provides grants and low interest loans for tuition, fees, and living expenses. Students can receive loans and grants for a maximum of six years of study.

United Kingdom. The United Kingdom offers a wide range of support for students from diverse backgrounds who are interested in a variety of program types at various levels. This support includes the Sutton Trust Program, which welcomed its seventh cohort of students in April 2018. This innovative program provides generous support to economically disadvantaged students with outstanding academic qualifications who want to apply to U.S. colleges and universities. BUNAC also provides support, offering partial scholarships for British students applying for graduate school in the United States or Canada (www.bunac.org/bunac/scholarships-and-awards).

Ukraine. WorldWideStudies grants cover university fees, study materials, and health insurance for up to USD\$50,000 for Master's degree programs. Priority fields include agriculture, environmental studies, ecology, law and public administration, alternative energy, and aerospace engineering, but other fields are eligible for consideration. The WNISEF Seed Grant Program is also available to

students from Ukraine and can cover Master of Public Health programs in addition to MBA programs.

Regional EducationUSA Events

EducationUSA in Europe and Eurasia provides a wide variety of opportunities for HEI engagement in the region. Most EducationUSA advising centers plan local events throughout the year as well. Visit the EducationUSA website to find information about upcoming fairs, webinars, conferences, and other upcoming events and activities.

Fairs and Conferences

- **The EducationUSA Pavilion at European Association for International Education (EAIE) 2018** September 11–14, **Geneva, Switzerland.** Last September, more than 6,000 higher education professionals from more than 95 countries attended the EAIE conference in Seville, Spain. EAIE is the largest conference of its type anywhere in Europe. U.S. HEIs that exhibit at the booth have reported that the EducationUSA Pavilion led to an increase in their school's visibility at the event, more students from Europe on their campuses, and an increase in exchange-related income for their institutions. Accredited U.S. colleges and universities are welcome to join the EducationUSA Pavilion at the 2018 EAIE conference. Learn more at www.educationusa.state.gov/events/educationusa-pavilion-eaie-2018 or www.eaie.org/geneva.html.

- The major event for student recruitment in the **United Kingdom** is the annual **USA College Day** in late September. More than 4,500 visitors attend the fair over one-and-a-half days to meet with 170 U.S. colleges. Many U.S. universities visit schools and undertake targeted outreach earlier in the week before heading to fairs in other Northern European countries. Email collegeday@fulbright.org.uk for more information.

- The Fulbright Commission in **Belgium** will host the **34th Annual Brussels College Night** on October 1, 2018. This event is the only U.S.-focused college fair in Belgium and provides university representatives with access to high school students from across Belgium, including a number of international schools in the region of

Brussels. University representatives can learn more about the annual event and register online at www.brusselscollegenight.be.

- **EducationUSA France** will partner with several organizations on a series of events over the coming year, including the **Council of International Schools (CIS) Paris College Day**, (www.cois.org) the **Studyrama International Study Fair**, (www.studyrama.com) and L'Etudiant International Study Fair which take place in Paris (www.letudiant.fr).

- In the **Netherlands**, **Amsterdam College Night** will be held on October 5, 2018. For more information, contact info@fulbright.nl.

- Join EducationUSA fairs at the 24th annual **U.S. University Fair in Athens** on October 9, 2018, and **Nicosia** on October 10, 2018. These fairs are part of the 2018 European and Mediterranean College Fair Series organized by America-Mideast Educational and Training Service, Inc.; CIS; College Council; the Fulbright Commissions in Belgium, United Kingdom, and Greece; the U.S. Embassy Luxembourg; and the StudyUSA Higher Education Consultants in Nicosia. In 2017, the fair in Nicosia attracted more than 300 students from both the Greek and Turkish Cypriot communities. U.S. Embassy Cyprus partially supports the fair.

- **The Higher Education and Scholarships Fair**, organized by EducationUSA **Croatia**, is the largest fair of its kind in Croatia or any other country in Southeastern Europe. It is a unique event that will take place in major Croatian university cities including Zagreb on October 16, 2018, and the Adriatic coastal city of Rijeka on October 18, 2018. More than 10,000 Croatian students, parents, adult learners, and higher education professionals are expected to attend.

- The **8th Annual Eurasia Tour** (October 20–November 10) will again include the Baltic countries and introduce Belarus as a new recruitment destination. The tour will make 11 stops in 9 countries, with two new locations this year: Minsk, Belarus, and Odessa, Ukraine. More information about the tour is available at www.educationusaeurasiatour.org.

- EducationUSA will host its **4th Annual European LLM Tour** in November 2018. In 2017, the tour took U.S. law school representatives to eight cities in Europe: Amsterdam, Paris, Brussels, Luxembourg, Oslo, Prague, Zagreb, and Vienna. Representatives met with 550 participants at the fairs and participated in country briefings and visits to local universities. This year, additional cities will be added as a result of high demand. For more information, contact REACs Peter Baker (pbaker@educationusa.org) and Gordana Mirchikj (gmirchikj@educationusa.org).

school students. The fair will also take place in 2019 with the goal of expanding the program to reach students in other cities in Turkey.

- The **6th Annual Russian Winter Tour** will take place February 22–March 5, 2019, and make stops in Moscow, St. Petersburg, Novosibirsk, Yekaterinburg, and Vladivostok. Registration is expected to open in May 2018 and will be announced in upcoming U.S. Higher Education Monthly Updates. More information is available at winter.educationusarussia.org.

- Join **EducationUSA Sweden** at the following events in 2019: Malmö Borgarskola and VRG Stockholm in March, the SACO Fair in Stockholm and Malmö in November or December, and the Kunskap & Framtid Education Fair in Gothenburg in November.

U.S. Study Abroad in the Region

- In AY 2015–2016, more than half of the U.S. students who studied abroad studied in Europe. The top five destinations globally were the United Kingdom, Italy, Spain, France, and Germany. Other European countries in the top 25 include Ireland, Denmark, the Czech Republic, Greece, the Netherlands, and Austria.
- Other countries in the region have seen significant increases in inbound student mobility from the United States. The largest increases include Bulgaria, Estonia, Kosovo, Iceland, Lithuania, Montenegro, Romania, and Ukraine.
- In the spring 2018 semester, 52 percent of all Gilman Scholarships were awarded to U.S. students for study abroad experiences in 27 of the 46 countries in the Europe and Eurasia region.

Best and Worst Times of the Year to Interact with Students (Face to Face and Virtually)

In general, the best time to interact with students is September to November and February to May.

Times to avoid travel: Avoid recruitment travel or virtual programming in July, August, over the Christmas and New Year holidays, and around Easter. As always, institutions should check with the EducationUSA advisers in the country they want to visit before making any travel or virtual outreach plans. Advisers in each country know about national holidays and other factors, such as examination dates, that might affect students' ability to attend events.

- The **6th Annual EducationUSA Southeastern Europe Tour** in 2019 will include fairs in Slovenia, Croatia, Bosnia and Herzegovina, Serbia, Montenegro, Macedonia, Kosovo, and Albania, the newest stop on the tour. The tour generally takes place in April. EducationUSA will confirm the dates in summer 2018. Sign up to receive the EducationUSA monthly newsletter on Europe and Eurasia to keep in touch with recruiting events planned in the region as well as information about emerging trends at (eepurl.com/bUIBOT).

- Security concerns in **Turkey** over the past couple of years and visa issuance suspension have discouraged much of the outreach that Turkey normally sees by U.S. HEI representatives. Turkey remains, however, the second largest European sending country of students to the United States. EducationUSA, the U.S. Department of Commerce, and the Mezun Group hosted the country's second virtual college fair in 2018. This event was organized in Istanbul and attracted many university and high

- **BeSt³ Vienna**, the largest education fair in **Austria**, will take place in March 2019 and will focus on jobs, studies, training, and continuing education. Around 350 exhibitors provide their insight into innovative educational opportunities and highlight current trends in the career field. This fair will include a number of EducationUSA-led workshops.

- The **4th Annual Iberian Tour** will take place in March 2019 and include major cities across Spain and Portugal. For more information, please contact REAC Peter Baker (pbaker@educationusa.org).

- **College Day Scandinavia**, which usually takes place in March each year, is the best opportunity to meet a large group of Icelandic students interested in studying in the United States.

- EducationUSA **Norway** participates in the largest education fair in Norway, called **TaUtdanning**, in January/February. It also hosts the largest U.S.-focused fair in March called College Day Scandinavia.

- In 2017, the U.S. Department of State's study abroad branch provided funds to posts and Fulbright Commissions to develop programming aimed at increasing educational institutions' capacity to host American students in Armenia, Azerbaijan, Belarus, Belgium, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Greece, Hungary, Italy, Norway, Portugal, Spain, Slovenia, and Turkey.

- U.S. study abroad students are welcome to join EducationUSA programming activities throughout the region. U.S. institutions are encouraged to provide training to study abroad program participants prior to departing the United States so that students can promote the institution to local audiences. Students have delivered general presentations about their institution, joined conversation groups, assisted with mock admissions interviews, participated in alumni fairs, and participated in other events that allow them to engage with local high school and university students.

Middle East and North Africa

Regional EducationUSA Profile

Algeria, Bahrain, Egypt, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Palestinian Territories, Qatar, Saudi Arabia, Syria, Tunisia, United Arab Emirates, Yemen

28

EducationUSA Advising Centers in the Region

17 Comprehensive
6 Standard
5 Reference

EducationUSA advising centers in the Middle East and North Africa (MENA) are located at U.S. embassies and consulates, America-Mideast Educational and Training Services, Inc. (AMIDEAST) offices, and American Centers. EducationUSA advising activities in Iran, Syria, and Libya are conducted virtually. The region has 28 centers (17 comprehensive centers, six standard, and five reference centers) in 19 countries with 32 advisers who provide up-to-date services and programming.

EducationUSA advisers are knowledgeable about local educational systems and contexts. Each center provides students, U.S. higher education institutions (HEIs), and governmental partners with tailored programs and activities. EducationUSA advisers also serve as resources to government scholarship offices in Iraq, Kuwait, Oman, Qatar, Saudi Arabia, and United Arab Emirates (UAE). These efforts include connecting scholarship offices with potential U.S. HEI partners and advising scholarship students in finding appropriate study opportunities in the United States.

EducationUSA advisers in the MENA region work in an environment of frequent change and opportunity. Despite growth over the past ten years, the 2017 *Open Doors* report indicates a 7.6-percent decrease in students coming from the region during AY 2016–2017 from 2015–2016. This decline is the first from the MENA region since

2004–2005, with Saudi Arabia (-14.2 percent) and Libya (-13.4 percent) decreasing significantly as a result of the scaling back of government scholarship programs. In contrast, North Africa saw a 3.3-percent increase overall, with a 21.5-percent increase from Algeria.

The region boasts many Competitive College Clubs (CCCs) at which advisers meet semimonthly with academically engaged high school students to prepare them for study at U.S. campuses and to guide them through the unique aspects of the college application processes. Advisers work with students to find the best institutional fit—academically, socially, and financially. CCC activities include community service projects, book clubs, poetry recitals, spelling bees, guest speakers, test preparation, and information sessions on the application process. All CCCs foster student leadership skills. More than 140 students from the MENA region successfully completed a CCC program in AY 2017–2018 and will study in the United States in fall 2018. Currently, there are CCCs in Egypt, Lebanon, Morocco, the Palestinian Territories, Saudi Arabia, and Tunisia.

The Opportunity Funds program supports talented, economically disadvantaged undergraduate and graduate students by providing the upfront costs of applying to U.S. institutions, which can include testing, application fees, U.S. visa/Student Exchange Visitor Information System (SEVIS) fees, and travel to the



United States. In the MENA region, EducationUSA Egypt, EducationUSA Tunisia, and EducationUSA Lebanon support Opportunity Funds students.

EducationUSA advising centers in MENA conduct strategic outreach in collaboration with Public Affairs and Consular sections of embassies and consulates. Approximately half of the advising centers in MENA are based at an embassy or consulate and sit within the Public Affairs sections. Regional Educational Advising Coordinators (REACs) and EducationUSA advisers hold monthly education briefing and recruitment webinars for U.S. HEIs about local educational systems, trends, opportunities, and recruitment strategies.

Regional Overview

The United States remains one of the top higher education destinations for students from MENA, despite a 7.6-percent decrease in the number of Middle Eastern students enrolled at U.S. colleges and universities in 2016–2017. The decline in new enrollments is predominantly the result of the scaling back of government scholarship programs in Saudi Arabia, Libya, and Iraq. These countries combined

had a decline of 15.1 percent in the number of students sent abroad to pursue higher education. Scholarship programs across the region are being revised and restructured and are likely to be negatively affected by lower oil prices. Local institutions as well as an increasingly diverse range of countries are becoming attractive destinations as a result of cost, location, and institutional partnerships with local institutions. There is also new growth in the region, with notable increases in U.S. enrollment from Algeria, Egypt, and Lebanon.

Over the past decade, MENA has experienced one of the highest rates of population growth of any region in the world. According to the Central Intelligence Agency World Fact Book, more than 46 percent of the Middle East's population is younger than age 24. Student demand for postsecondary education far exceeds the capacity of local universities in many countries. In addition, the uneven quality of the higher education systems in the region leaves some students without the necessary skills to enter a competitive labor market.

Lebanon, the Palestinian Territories, and Tunisia are interested in exploring

the benefits of community colleges. Of the students who went to the United States from these countries, 32 percent chose to attend community colleges. Most countries in the region have engaged with the U.S. government and U.S. colleges and universities to expand local higher education capacity through institutional linkages.

Many universities in the Gulf are interested in hosting American-educated professors to develop their institutional capacity and are eager to connect with faculty at U.S. institutions for collaborative research and teaching opportunities. Although students in the Gulf region have adequate access to universities in their home countries, they have a strong interest in pursuing education in the United States, particularly at the graduate level.

Recent Trends

- Many universities in the region seek linkages with U.S. institutions. EducationUSA REACs and advisers provide local institutions with information about how to identify appropriate U.S. partners and tips on how to develop effective reciprocal student and scholar exchange

Middle East and North Africa

agreements. Government officials and HEI administrators from Egypt, Iraq, Israel, Jordan, Kuwait, Morocco, the Palestinian Territories, Saudi Arabia, Tunisia, and UAE participated in the EducationUSA Leadership Institutes between 2015–2017. A variety of U.S. institutions hosted these institutes on topics in internationalization, further developing their capacity to establish effective partnerships.

- Many countries in the region want their workforces to include U.S.-trained professionals. Governments support this goal through scholarship programs, short-term grants for faculty, and short-term training programs for government officials and administrators. This support is in response to the demographic boom and rapid urbanization across the Arab world.
- MENA students are interested in a variety of countries for study abroad; some choose Canada as a result of a perception that the country offers lower tuition rates and an easy student visa process. The United Kingdom is attractive because of geographic proximity and strong ties to Gulf countries such as Bahrain and UAE. For students from North Africa, France remains an attractive alternative because of geographic proximity and linguistic affinity. Increasing numbers are choosing to stay closer to the region, choosing institutions in Turkey, Oman, and UAE. In addition to U.S. branch campuses in Lebanon (one), Qatar (seven), and UAE (three), numerous local American-style HEIs have attained accreditation by

one or more of the U.S. accrediting organizations. Currently, there are six in Egypt, three in Lebanon, 11 in Saudi Arabia, and five in the UAE.

- Intensive English Programs (IEPs) have seen a decrease in student enrollments from MENA, with a significant drop from Kuwait (-30.0 percent), Oman (-30.0 percent), and Saudi Arabia (-45.2 percent). According to the Institute for International Education (IIE) *Open Doors* survey (funded by the U.S. Department of State's Bureau of Educational and Cultural Affairs), the overall number of students enrolled in IEPs fell by 18.7 percent in 2016–2017 compared with the year before. Many government scholarships that previously supported or required English language study have been reduced, or in a few cases put on hold and are imposing higher academic eligibility requirements, depressing enrollment. In some cases, students are beginning their English language instruction programs in-country before moving into degree programs in the United States.
- Recruiters are often asked to seek local government permission before entering secondary schools. The security process to gain access takes time, especially in government schools such as the STEM-focused schools. These schools tend to have the most qualified students for scholarships as well as those who demonstrate high financial need. Some countries, such as Jordan, are introducing new mandates requesting fair organizers to

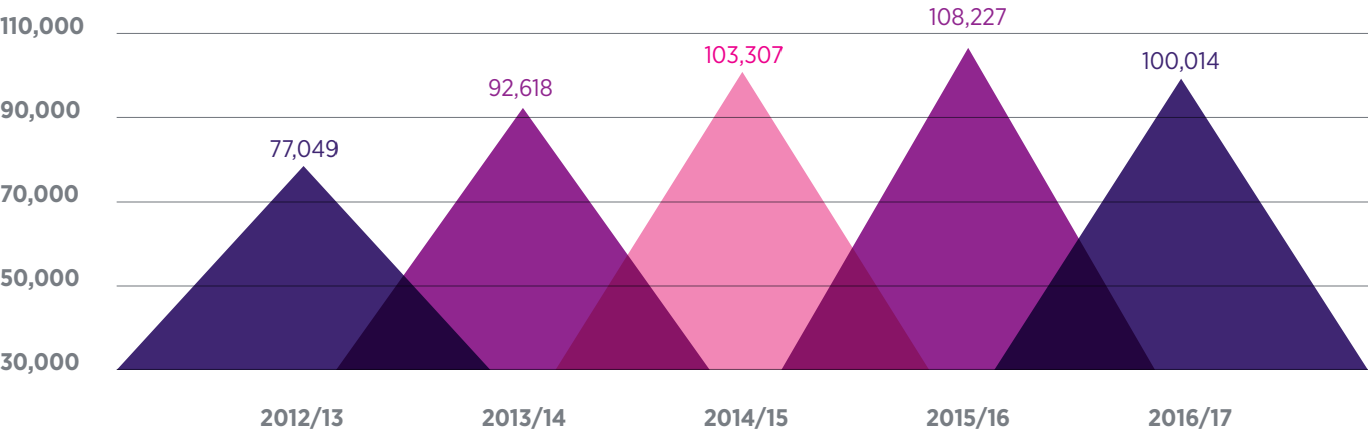
collaborate with a local agency when hosting public fairs.

- Over the past year, changes to scholarship programs, safety concerns, visa restrictions, currency devaluation, and in-country political instability have all contributed to the decline in Middle Eastern student enrollments. Increased concern among Arab students about their reception and treatment in the United States is also a factor. The #YouAreWelcomeHere campaign is one way that U.S. institutions can share messages and videos with the global student community about the importance U.S. HEIs give to having a diverse student population on campus and their welcome to international students. Visiting the region and holding recruitment events in person are positive ways to show that the United States welcomes students from MENA.

Countries in the Spotlight

Algeria. The number of Algerian students interested in studying in the United States is growing, with the younger generation enthusiastic about studying English. The U.S. higher education system offers welcome diversity and choice to Algerian students, specifically at the graduate level. This is the first time in years that Algeria saw an increase in students coming to the United States (21.5 percent). In April 2017, EducationUSA brought 18 U.S. HEIs to Algeria for the first-ever EducationUSA North Africa Fair Tour. This opportunity promoted study in the United States

Student Mobility in the Region (Five-Year Trend)



among the large and increasingly English-speaking Algerian youth population. The EducationUSA fair had more than 3,000 students and parents attend, proving that the historically low *Open Doors* numbers (158 in AY 2015–2016) are not a reflection of the actual interest in U.S. education among Algerians. The vast majority of Algerian students require partial or full funding for their studies. The government of Algeria does not presently offer any scholarships or financial aid to students who want to study in the United States.

Iraq. The government of Iraq’s Ministry of Higher Education and Scientific Research (MoHESR) has taken steps to grant accreditation to private, not-for-profit, American-style universities in Iraq. The American University of Iraq-Sulaimani and the American University of Kurdistan-Duhok received recognition from MoHESR in 2017. Recognizing the benefits of an American-style education and the value of offering more choices to students, MoHESR would like to open another American-style university in Baghdad. Education officials in the Iraqi Kurdistan region are also considering steps to accredit the American-style K-12 education offered at several private schools in the region.

Jordan. EducationUSA Jordan promotes graduate programs primed to contribute to Jordan’s economic growth through GradJobsJO, a series of interactive fairs that connect students with U.S.

institutions. In 2017, EducationUSA Jordan launched the second iteration of the EducationUSA fair, offering participation sponsorship packages to 25 U.S. colleges and universities funded by the U.S. embassy in Jordan. These fairs manage to attract a large number of Jordanian students and students from around the region, especially from Iraq, Syria, and Yemen.

Lebanon. Lebanon is made up of people from diverse socioeconomic and religious backgrounds, with 18 official sects in the country. The current crisis in Syria has created extraordinary economic and other challenges. With a population of about 4.5 million, Lebanon hosts 1.5 million Syrian refugees. Lebanon now hosts more refugees per capita than any other country in the world. The EducationUSA Lebanon office currently serves diverse student groups: Lebanese, Palestinian refugees, and Syrian refugees. Lebanese advisers use the CCC alumni network to reach out to various secondary schools and promote educational advising. The EducationUSA offices in Lebanon work closely with local high school counselors and depend heavily on social media platforms. The Lebanese government does not organize any education fairs. Recently, EducationUSA offices have seen increasing interest in students transferring to U.S. institutions in the middle of their degree programs. More students are looking to study abroad as the cost of education in Lebanon has

increased drastically. Many will apply for financial aid or merit scholarships. In August 2017, ten Lebanese CCC students departed to the United States to start their undergraduate degrees. With the help and direction of the EducationUSA center in Beirut, they were awarded a total of USD\$2.2 million in scholarships over a four-year period.

Saudi Arabia. Saudi Arabia, the largest sender of students from the region, saw a 14.2-percent decrease in the number of students sent to the United States in AY 2016–2017. This decline is the first since 2004–2005 and is attributed to the scaling back of the government’s foreign scholarship program. As the fourth largest sender of international students to the United States (after China, India, and South Korea), Saudi student enrollment has a significant impact on total international student enrollment at U.S. institutions. Better post-graduation job placement has the potential to increase enrollment. To improve job placement after graduation, the Saudi Arabian Ministry of Education (MOE) has developed strategic partnerships with government agencies and state-owned companies to provide jobs for graduates at the completion of their studies.

Syria. According to the United Nations High Commissioner for Refugees, there are more than five million Syrian refugees worldwide and more than six million internally displaced people in Syria. IIE estimates that the

193.5%

Oman has the largest percentage growth in the region over the last five years (*with over 100 students*)

Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students in the Region (Five-Year Trend)

Country	2012/13	2016/17	%Change
Oman	980	2,876	193.5%
Kuwait	5,115	9,825	92.1%
Yemen	353	658	86.4%
Syria	505	827	63.8%
Iraq	1,074	1,698	58.1%

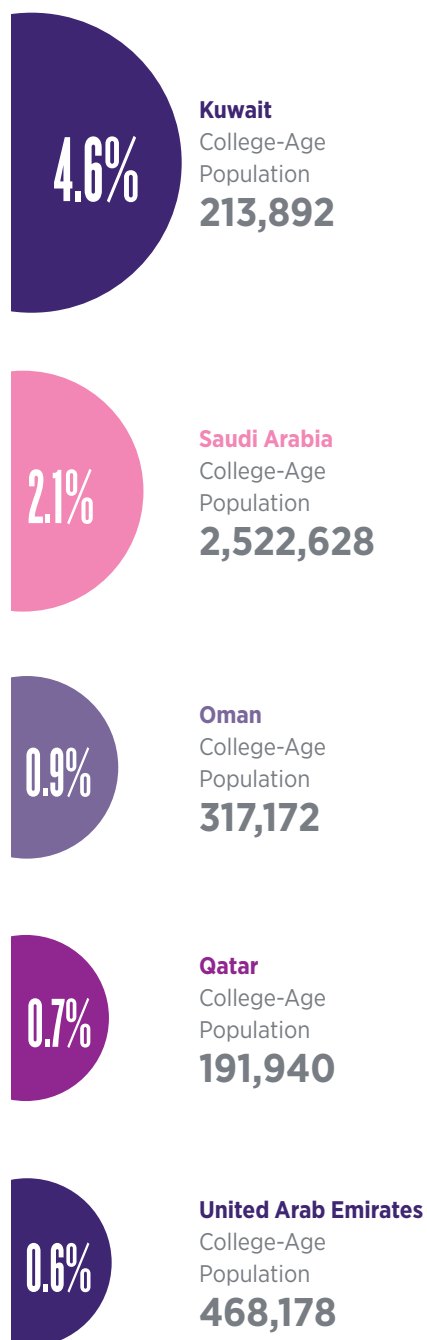
Middle East and North Africa

education of approximately 200,000 university-age Syrian students has been disrupted. Barriers to accessing higher education outside of Syria include lack of funding and insufficient scholarship opportunities, language barriers, and limited access to official documents and standardized testing. In March 2017, IIE launched the Platform for Education in Emergencies Response ([PEER] www.iiepeer.org). PEER is an online database of educational opportunities and additional resources that are available to Syrian students. Although PEER initially focuses on Syrians, it will eventually include opportunities for all displaced students. Universities, colleges, and other interested organizations can connect with PEER to feature scholarships and resources. EducationUSA Syria has advised Syrian students and refugees virtually since 2011 through email and social media platforms, including Facebook, Twitter, Skype, and Google+ Hangouts.

What to Expect in the Next Three to Five Years

- American HEIs will continue to see interest from students in countries offering government scholarships, particularly in graduate education and professional Master's degree programs. However, stricter standards might apply in the future to conditions of eligibility and location of study. Given recent domestic economic challenges, some countries are making policy changes to the conditions of their government scholarship programs. Scholarship recipients are held to strict standards in adhering to program criteria, approved areas of study, and the governments' lists of pre-approved institutions, which significantly affects how many students receive scholarships, where they study, and their programs of study. These changes to the scholarship programs may result in fewer students able to study in the United States for their degrees and a corresponding decline in students enrolling in U.S.-based English language institutes prior to their studies.
- MENA governments look to the United States for educational expertise and are eager to send students abroad to gain the knowledge and skills they need to contribute to higher education reform at home. American institutions should expect more calls for partnerships, linkages, and U.S. faculty visits to the region as local institutions see their U.S. counterparts as models. STEM subjects are the highest priority across the region. Many institutions in the region have funding to send faculty to the United States for teacher training and advanced research but sometimes struggle to find the right partnership.
- The Moroccan Ministry of Higher Education (MOHE) has a national strategy that aims to improve the quality of education, bolster scientific research, foster competitiveness in the global economy, and improve the governance of the national educational system. Many professors in Morocco are reaching retirement age, and there is strong interest in Ph.D.s for Moroccans in the STEM and English language fields. Morocco is striving to become the hub for higher education in North Africa. Many students from across North Africa choose to study abroad in Europe rather than the United States given proximity, the low tuition cost, the simpler application process, degree equivalency, similar education structures, and French-language instruction. However, there are still opportunities to attract Moroccan students, and nearly 1,640 Moroccan students studied in the United States in AY 2016–2017, a 9.3-percent increase.
- The eight universities in areas liberated from Daesh (or ISIS) in Iraq will require significant restoration and rebuilding to fully reopen and provide adequate services to students and faculty. Affected campuses were severely damaged and many buildings were destroyed in the conflict. Affected universities are eager for partnerships with U.S. institutions that can provide virtual lectures, training, and other programming. Rebuilding will require a significant financial investment by the government of Iraq and the international community. After the defeat of ISIS and the return of more peaceful conditions to Iraq, the higher education system seeks to expand its engagement with U.S. universities. Scholarship awards may gradually increase, though program changes are expected. There is interest in expanding the teaching of English in Iraq, and in government-funded scholarship programs to develop English language centers in partnership with U.S. providers. Reinvigorating the Iraqi economy and creating new jobs for young graduates is a priority, so career centers at colleges and universities and connections to industry, both local and international companies, will also be important. This situation will create opportunities for U.S. institutions to provide short-term certificate programs that prepare students for the workforce at both the baccalaureate and vocational/technical levels. The Iraqi MOHE recently provided official recognition to the first American-style university in Iraq, signaling an increased openness to U.S. higher education systems.
- The UAE MOE developed and is following its Education 2020 strategy, a series of ambitious five-year plans designed to improve the education system, especially in the way teachers teach and students learn. A key area of focus has been to ensure that students are fully prepared to attend universities around the world and compete in the global marketplace. As part of the overall development, the MOE developed and implemented a new exam, The Emirates Standardized Test (EmSAT), for grade-12 students in government schools or private schools that offer the MOE curriculum. EmSAT replaces the Common Educational Proficiency Assessment as an accredited admissions test at public postsecondary schools in UAE. EmSAT will initially cover English, Arabic, mathematics, and physics. The test aims to provide decision-makers with accurate and important information to enable them to make the necessary decisions to improve the education system. In the future, this standardized assessment can serve as a metric to aid in admissions to foreign institutions.
- Education is well represented in Saudi Arabia's Vision 2030. With 130 education initiatives, including an ambitious education reform program, the MOE focuses on all stages of education—early childhood, primary, secondary, and postsecondary. From 2017–2018, the MOE primarily focused on improving pre-K–12 education, with a strong emphasis on teacher training.

Five Countries of Origin in the Region with Highest Per Capita College-Age Student Mobility to the United States



Source: UNESCO Institute of Statistics; Indicator: 2015 Population of the official age for tertiary education, both sexes

At the start of 2018, the Saudi Royal Commission for Al-Ula introduced a new scholarship program for Saudi citizens from Al-Ula. The commission is tasked with developing the Al-Ula governorate to make it one of the most important archaeological and cultural destinations in Saudi Arabia. The Al-Ula scholarship program will send 1,000 students abroad over the next five years to earn undergraduate and graduate degrees in archeology, agriculture, and hospitality and tourism. The scholarship will also cover 12–18 months of English language training.

- The weakening of the local currency in countries including Egypt, Tunisia, and Yemen has caused students to consider a wide range of destinations, such as European countries that offer full scholarships. In contrast, many Gulf countries such as Kuwait, Saudi Arabia, and UAE have currencies pegged against a basket of currencies, creating greater stability for students contemplating study abroad. As of January 1, 2018, Saudi Arabia and UAE were the first Gulf countries in the region to introduce value-added tax at five percent on most goods and services, boosting non-oil economies.

• Many governments sponsor college and university fairs and appreciate U.S. institutions' attendance. EducationUSA advisers can provide guidance on participating in these events, gaining approvals, and facilitating communication with ministries of higher education. Countries that regularly sponsor these events include Kuwait, Oman, Qatar, Saudi Arabia, and UAE. U.S. institutions can also send faculty to EducationUSA-sponsored events where staff can arrange faculty-to-faculty dialogues and provide U.S. higher education representatives with a focused approach toward collaborative research projects. Alumni of U.S. institutions are often welcome to attend and represent their alma maters as well. Most events will indicate on the website if alumni may register.

- Many oil companies and other private firms in the region offer scholarships to their employees. These funds are available for current and future employees working in the STEM fields. Abu Dhabi National Oil Company,

SABIC, and Saudi Aramco all have programs for high school students who are on track to become employees following the completion of a Bachelor's degree in the United States.

Virtual and Social Media Usage

- According to Internet World Stats, there were 146 million internet users in the MENA region in 2017. Internet connectivity is generally sufficient in both homes and cyber cafés in large cities, with few exceptions (namely Yemen, the Palestinian Territories, Syria, Libya, and parts of Iraq). Challenges to virtual and social media usage include power outages, which are common in some countries, connectivity issues, and internet restrictions. As a result, large files can be difficult for students to open. U.S. institutions can send promotional videos and other large electronic files directly to EducationUSA advising centers where students can open and view them more easily.
- The EducationUSA Iran adviser, based in the United States, provides information about U.S. study options to students virtually, including via a dedicated website in Farsi (www.educationusairan.com). In 2018, the website is being revamped and updated in both English and Farsi and will have a specific section for HEI representatives. The adviser also provides information about the Iranian higher education system to the U.S. higher education community. Over the past year, EducationUSA has seen a record number of Iranian students participate in web chats, webinars, and

Regional Student Totals Top Five Countries of Origin

Country	2016/17	% Change 2015/16
Saudi Arabia	52,611	-14.2%
Iran	12,643	3.0%
Kuwait	9,825	0.5%
Egypt	3,715	7.9%
Oman	2,876	0.007%

Middle East and North Africa

virtual fairs. Telegram and Instagram are top platforms for Iranians. As a result of internet censorship and filtering, Iranians' access to some social media platforms including Facebook, YouTube, and Twitter is limited. It is strongly recommended that HEIs keep social media platforms updated and boost posts related to Iranian students. These tools enable institutions to overcome existing communication barriers and reach more Iranian students without the benefits of a physical center located in the country.

- EducationUSA advisers in Libya, Syria, and Yemen also continue to work virtually, assisting students through Skype and other online communication tools. In March 2017, EducationUSA hosted the first two-week massive open online course (MOOC) camp in Yemen, focused on "Searching and Researching Online." The course featured ten intensive workshops and two advising

sessions to enable students and young professionals to build the online research skills they need to identify appropriate universities and potential scholarship opportunities and to initiate the application process. EducationUSA virtual centers depend on these useful platforms to reach students.

- Facebook is the most-visited website in most of the region, with more than 87 million active users. YouTube is widely used by students to view videos posted by colleges and universities. Even in countries where the site is banned, students are often able to access it through proxy servers. SnapChat, WhatsApp, and Instagram also have a large following in MENA. In 2017, EducationUSA Saudi Arabia used YouTube to reach almost seven million Saudi students and parents with a nine-episode cartoon video series called Amreeka 101 (tinyurl.com/Amreeka101) about studying in the United States.
- Qataris are very engaged on Twitter

and Instagram. In addition to having the highest social media penetration in the world, Qataris also have the highest percentage of any population using social media through mobile devices. According to a Hootsuite report, about 2.3 million people access social media through mobile devices, which is about 95 percent of the Qatari population.

- Given the value of face-to-face communication, interactive platforms such as EducationUSA webinars offer creative opportunities to engage youth while informing them about educational opportunities in the United States. In UAE, EducationUSA is launching an application in summer 2018 specifically to reach students and parents.

Successful Recruiting Strategies

- Consider high school guidance counselors as a resource. Local high school guidance counselors meet frequently to share best practices in the admissions application process and to discuss topics such as applying for student visas, writing school profiles, meeting application deadlines, and selecting the institutions that best meet students' needs. The EducationUSA network provides counselors with college advising resources as well. The relationships that advisers share with these counselors ensure that visiting U.S. admissions officers have productive trips that allow them to interact with a broad range of students.

- Translate websites into Arabic, Farsi (Persian), or Kurdish and record videos of students from MENA as a means to engage parents and students with limited English language skills. Provide more visual information about living on campus. Particularly at the undergraduate level, students want to see what living arrangements are like. Highlight institutional support and student services (academic, extracurricular, social, security, and medical services) for those students who bring families and chaperones as well as for those who travel alone. Conduct focus groups with new students to ask them about how to simplify the application and settling-in process.

- Keep family members in mind. They play an important role in students' decision-making. Many graduate

U.S. Study Abroad

Top Five Receiving Countries in the Region

Destination	2015/16	% Change
Israel	2,435	-26.6%
Morocco	1,403	-0.7%
Jordan	969	-1.6%
United Arab Emirates	718	16.0%
Oman	143	55.4%

Five Countries (with over 25 students) with Highest Percentage Growth, U.S. Students in the Region (Five-Year Trend)

Country Name	2011/12	2015/16	% Change
Oman	51	143	180.4%
Morocco	957	1,403	46.6%
United Arab Emirates	661	718	8.6%
Jordan	976	969	-0.7%
Qatar	151	122	-19.2%

students will be in the United States with their families and prefer institutions that provide support for their households.

- Leverage the power of “word of mouth,” as it is particularly important in the region. Cultivate relationships with current international students and international alumni, and visit alumni when recruiting abroad. Alumni, many of whom have key positions in the public and private sectors, appreciate the opportunity to engage with admissions officers from their alma maters.
- Engage current international students on campus, as they can provide insights and advice to prospective students from their home countries and regions during the recruitment and student orientation seasons.
- Consider recruiting off the beaten path and going to North Africa. This market is untapped. The region does not get many HEI visits but has great potential. Contact EducationUSA to assist with a trip to Morocco, Algeria, Tunisia, or Egypt. More than 1,000 students attended each of the EducationUSA fairs held in Casablanca, Algiers, and Tunis, showing that students from North Africa are very interested in U.S. education and eager to meet admission representatives.

Foreign Government and Private Funding

Bahrain, Egypt, Iraq, Kuwait, Oman, Qatar, Saudi Arabia, and the UAE currently fund government scholarship programs. These governments maintain lists of approved receiving institutions, which can often be the chief barrier to recruiting funded students from these countries. One strategy to raise awareness of U.S. institutions and increase the chance of inclusion on these lists is to visit these countries’ cultural missions in Washington, DC, and to reach out to them directly by email or phone. A visit or phone call gives U.S. institutions the opportunity to inform these countries about their programs of study, express interest in hosting students from the region, and explain how U.S. institutions are prepared to be effective and qualified hosts for their international students.

Iraq. The government of Iraq’s Ministry of



Higher Education and Scientific Research (MoHESR) will award 100 scholarships for students with Bachelor’s degrees to earn doctoral degrees at institutions abroad, including the United States, with a focus on STEM and a variety of medical sciences. This award is the first time that the modern scholarship program has funded students to earn a combined Master’s/Doctorate degree abroad. Working with a U.S. partner, MoHESR would like to open an English language center at the ministry to provide scholarship recipients with English language instruction before they apply to U.S. institutions.

Jordan. Although there is no official government scholarship program for Jordanian students, several scholarships are available at U.S. institutions that are offered only to Jordanian applicants (i.e., Late King Hussein Scholarship at Elon University and the Queen Rania Al Abdullah Scholarship at Marymount University). Universities in Jordan offer a wide range of scholarships and

fellowships to students interested in pursuing graduate degrees abroad.

Kuwait. In 2014, the government of Kuwait increased the number of scholarships awarded to undergraduate students for U.S. study. Each year, the government continues to expand the scholarship program. With more than 9,800 students in 2016–2017, Kuwait is now the 17th leading place of origin, after joining the top 25 list only five years ago. The government scholarship is for either undergraduate or graduate studies and includes English language studies during the first year. Kuwaiti students receive their scholarship approvals in July every year. Government agencies and private institutions such as Kuwait University, Kuwait Institute for Scientific Research, the Civil Service Commission, the Public Authority for Education and Training—for graduate students only, and the Kuwait Investment Authority Master of Business Administration scholarship award offer additional scholarship opportunities for graduate students. The majority of Kuwaiti students studying abroad

Middle East and North Africa



comes from a public school background. EducationUSA anticipates growth in graduate studies and particularly advanced degrees in STEM education.

Qatar. There have been significant changes to the Qatari government scholarship program. In the summer of 2017, the MOE published a revised list of approved universities for global scholarships. The revision saw a dramatic decrease in the number of institutions, with the list reduced to 255 from 360, and the approved list for self-funded students reduced from 1,446 to 575. The government completely removed community colleges from the list, although scholarships are still available for one year of English as a Second Language at an approved institution. Globally, there was a reduction in the number of approved institutions. The government also reduced the number of UK universities by 20 percent. Students on scholarship, according to the new regulations, need to have a job offer from a government entity before they get their scholarship approved. Upon graduation, students need to work for twice the number of years for which they received a scholarship or repay the scholarship funds. The new changes, with the removal of community colleges in particular, will negatively impact the number of students who select the United States as their destination. The number one challenge for Qataris traveling to the United States to pursue their studies will be the availability of

Qatari government funding. As a result of low oil prices and the economic blockade of Qatar, the trend is for austerity in government spending. With that, Qataris may prioritize investment in local HEIs, including the six American university campuses in Doha.

Saudi Arabia. The government of Saudi Arabia remains committed to funding the foreign scholarship program for the next several years and is working to restructure the program to better align with the country's economic goals. The MOE implemented new eligibility requirements for students applying for scholarship funding after enrolling in institutions abroad. Students must be in one of the world's top 200 ranked universities, as determined by the MOE.

Regional EducationUSA Events

Across MENA, EducationUSA centers plan several in-person events throughout the year. Check the EducationUSA website and Facebook pages to find information about webinars, fairs, and workshops in specific countries. Make sure to participate in ongoing virtual outreach opportunities in challenging recruitment environments such as Libya, Syria, Iran, and Yemen, as well as in Egypt, where the majority of outreach is done online. Attend a monthly EducationUSA webinar where the REAC and in-country adviser will provide a one-hour briefing on a specific country and include information on the local

educational system. The webinars, organized by the REAC, are advertised in the EducationUSA monthly HEI newsletter and across various listservs and social media platforms. To find more information, search under "Find an Event" on the EducationUSA website. To date, there have been webinars on Algeria, Bahrain, Egypt, Israel, Jordan, Oman, the Palestinian Territories, Qatar, Saudi Arabia, Syria, Tunisia, and UAE.

While participating in the many in-person student recruitment opportunities, such as EducationUSA fairs and regional forums, representatives of U.S. institutions can build on these events by receiving a country briefing from EducationUSA advisers (in-person or by phone), meeting with U.S. embassy Public Affairs and Consular staff (subject to scheduling availability), making a presentation at an EducationUSA advising center, and visiting local high schools or colleges. Contact the EducationUSA center organizing the event to explore options for maximizing the impact of participation. The following examples highlight upcoming fairs and exhibitions with EducationUSA participation.

Fairs and Conferences

- **UAE.** NAJAH, the official government-sponsored education expo attracting more than 11,500 visitors, will take place October 31 – November 2, 2018 in Abu Dhabi, www.najahonline.com/en/visit.html.
- **Oman.** EduTrex, with the Sultanate of Oman MOHE, takes place in August 2018, in Salalah, Oman, www.edutrex.com.
- **Egypt.** The AMIDEAST Egypt StudyUSA Fair will be in Cairo and Alexandria, October 12–13, 2018.
- **Qatar.** The only university expo in Qatar will be held in Doha from November 28 – 29, 2018, education.knect365.com/university-expo-qatar/.
- **Iraq.** The Baghdad International Fair is held by the government annually and usually takes place in October; the International Book Fair is scheduled for March–April 2019.
- **Bahrain.** EDUTEX Bahrain Education and Training Exhibition will be at the Bahrain

International Exhibition and Convention Center in March 2019, www.edutex.org.

- **Saudi Arabia.** The International Exhibition and Conference on Higher Education is a MOE hosted annual university fair with hundreds of local and international universities participating. The fair is held every other year, with the next one expected to be held in April 2019 in Riyadh, Saudi Arabia, www.ieche.com.sa/en.

- **Oman.** Global Higher Education Exhibition, Oman's largest higher education Expo will be in April 2019, www.ghedex.om.

- Many EducationUSA centers in the region host regular web chats and video conferences for students. Advisers hold short, online discussions about different programs of study and undergraduate and graduate admissions issues MENA students face. Advisers also present regular weekly or monthly sessions on topics such as financial aid, writing a personal statement, and preparing for standardized tests.

- All centers conduct pre-departure orientations in June or July. Some centers in the Gulf also conduct orientations in January. American institutions should advise accepted students to check educationusa.state.gov or contact their local EducationUSA center for exact dates and times. Even if a student has not contacted EducationUSA at any point in the application process, he or she is welcome to attend a pre-departure orientation.

- Many centers host counselor monthly meetings with counselors from the surrounding secondary schools. These meetings are a great way to get to know different schools and meet prospective students. Interested representatives should contact an adviser and ask to attend the next meeting.

U.S. Study Abroad in the Region

The number of U.S. students studying in the MENA region has generally been relatively small compared with the number of U.S. students studying abroad in the rest of the world. The region hosted only two percent of all U.S. study

abroad students in AY 2015–2016. The region saw a decrease of 11.7 percent over the previous year, with numbers dropping in Israel (-26.6 percent), Kuwait (-17.9 percent), Lebanon (-21.6 percent), the Palestinian Territories (-50 percent), and Tunisia (-58.7 percent). Despite the decline, Jordan, Morocco, Saudi Arabia, and UAE remain popular study abroad destinations. Several U.S. students also come to study or participate in exchange programs at the six American universities at the Qatar Foundation. These universities have exchange programs with their home campuses and see a flow

of students between the U.S. and Doha campuses throughout the year. There are fewer opportunities for U.S. students to study at other HEIs throughout the country because instruction is predominantly in Arabic.

Although EducationUSA advising centers in the region do not host study abroad programs, they offer internship opportunities and are eager to work with American student volunteers. Study abroad staff can inform students about potential internships and connect students with the local advising center.

Best and Worst Times of the Year to Interact with Students (Face to Face and Virtually)

Algeria. The best time to visit is from November to February. Avoid traveling during Ramadan and the Eid holidays.

Egypt. The best time to visit is from October to December and mid-February to April. Avoid visiting during Ramadan, Eid, and other major holidays including Sham el Nessim (April) and Sinai Liberation Day (April 25).

Iraq. The best time to visit is in February. Avoid visiting during Ramadan and the Eid holidays.

Israel. The best time to visit is from November to January and March to May. Avoid major holidays such as New Years and Passover, which can vary each year.

Jordan. The best time to visit is from October to November or February to May. Avoid traveling during major religious holidays (Ramadan, Eid, Easter, Palm Sunday).

Lebanon. The best time to visit is from mid-October to March. First term exams take place in early January. Avoid visiting during major religious holidays.

Libya. Travel is not advised.

Morocco. The best time to visit is from October to November or March to April. Avoid visiting during Ramadan and the Eid holidays.

Palestinian Territories. The best time to visit is from September to November or February to April. Avoid traveling during Ramadan, Eid, major exam periods (October, December/January, May/June) and the summer break (June to August).

Qatar. The best time to visit is from October to November or March to April. Avoid visiting during Ramadan and the Eid holidays.

Syria. Travel is not advised.

Tunisia. The best time to visit is from October to March, avoid major exam periods (early December and late February to early March).

Yemen. Travel not advised.

South and Central Asia

Regional EducationUSA Profile

Afghanistan, Bangladesh, Bhutan, India, Kazakhstan, Kyrgyzstan, Maldives, Nepal, Pakistan, Sri Lanka, Tajikistan, Turkmenistan, Uzbekistan

32

EducationUSA Advising Centers in the Region

16 Comprehensive
9 Standard
7 Reference

EducationUSA advising centers in South and Central Asia (SCA) are located at U.S. embassies and consulates, Fulbright Commissions, American Councils for International Education offices, and offices of local non-profit organizations. There are 80 advisers at 31 EducationUSA centers in SCA, with several countries hosting multiple advising centers at various host institutions. The largest concentration of centers is in India, Pakistan, Bangladesh, and Kazakhstan. India has 34 advisers across seven centers, Pakistan has 14 advisers across three centers, Bangladesh has seven advisers across three centers, and Kazakhstan has five advisers across five centers. Advisers in SCA function as mentors and local experts in U.S. higher education, providing advising sessions at the center, engaging with students virtually and in person, and conducting outreach activities. The Opportunity Funds program currently operates at EducationUSA advising centers in Nepal, Pakistan, Sri Lanka, and Turkmenistan.

EducationUSA advising centers in SCA conduct strategic outreach in close collaboration with U.S. embassy and consulate Public Affairs and Consular sections. U.S. HEI representatives assist advising centers in conducting outreach by providing webinars to audiences of advisers, students, high school counselors, and graduate departments within local institutions. In addition, in-person visits to advising centers by U.S. college and university representatives allow EducationUSA to highlight outreach opportunities with local HEIs and facilitate personal interaction with students, parents, and local educational institutions.

Regional Overview

The largest youth populations in the world are found in SCA, a region of vast cultural and geographic diversity. The rapidly growing youth population translates to limited access to higher education locally. Countries across SCA recognize the need for change and for curriculums that prepare students with the skills needed in the workforce. People-to-people ties and international student exchange are crucial in this region. South Asian economies are among the fastest growing in the world, and the region is a tremendous market for recruiting highly qualified students.

Stretching from Kazakhstan in the north to Sri Lanka in the south, students in this diverse region share common traits: students seek similar fields of study (notably, STEM and business) and look for the development of practical skills that translate into jobs. They and their parents are impressed by the perceived prestige of particular academic programs, and view the award of a scholarship similarly, even a partial tuition award. But the region's differences are also pronounced, and across the region, there is a wide variety of educational systems, including local government-supported schools and private English-medium schools. In this region, students from Central Asia are the most likely to seek out English-language learning programs abroad. In India and the rest of South Asia, students are able to master English in their home countries.

The burgeoning youth population, with a median age of less than 26 years, poses unique challenges not just in relation to limited capacity and access to quality higher education locally but also in terms of access to resources generally. The ramifications of climate change are increasingly felt across the region, and



concerns with water shortages, floods, land mass erosion, and failing crops have led to greater migration of rural populations to urban areas, creating demands at all levels of society. The region recognizes the importance of investing in higher education capacity to avoid brain drain but continues to struggle with the slow pace of change in local education systems.

The internet is widely accessible in SCA, with the majority of users accessing the web through mobile devices. Some areas, usually major cities, have easy access to fast and reliable internet service, while other areas have weak connectivity, if any at all. Also, the average speed can fluctuate between big and small cities. Power disruptions are decreasing; however, some countries continue to face outages during peak summer and winter months. In addition, government-imposed restrictions limit online activity in some countries. Government limits on internet speed, certain applications, and services impact student use. This situation affects students' ability to access online applications, conduct research, take tests, and interact virtually. EducationUSA centers in the region offer students an alternative and reliable way

to connect virtually and provide students with access to computers with good internet connectivity.

Students are increasingly going abroad to study and obtain the skills needed to implement change at home. Trained specialists in the fields of resource sustainability, finance, business administration, water management, law, engineering, and social services are required to meet regional challenges. The U.S. higher education system is well-placed to make an important impact in SCA, and institutions that offer programs with real-world skills to address these challenges face good prospects for recruitment.

Although the United States remains the number one choice for higher education abroad, students and families are attuned to political developments and discourse in the United States and perceived attitudes toward foreigners. Students are attracted to countries where they anticipate ease in obtaining student visas, work, and permanent residency. Traditionally, students from the region gravitated toward the United States, Canada, United Kingdom, and Australia. However, over the past few years, China,

Japan, Malaysia, and India have attracted more students. These countries offer government scholarships and affordable tuition to students from the region that, combined with proximity to the students' home countries, make these countries an increasingly attractive alternative.

Reliance on consultants or agents is increasingly common among prospective students. These consultants or agents provide a range of services, from offering minimal advice to full completion of the application package on behalf of a student. Admissions counselors should communicate directly with prospective students about their application package when possible to ensure they are able to articulate their own academic goals. Institutional representatives should highlight their institutional recruitment standards and ethics as a particular strength when speaking with parents and students.

Recent Trends

According to the most recent *Open Doors* report, in the United States, 20.3 percent of the total international student population originates from SCA. In AY 2016–2017, *Open Doors* reports a 12.2-percent increase in mobility from this region to 218,937 from 195,135 students

South and Central Asia

the previous year.

- The majority, 54.2 percent, of the total student population from SCA are in graduate programs, and 28 percent are enrolled in Optional Practical Training (OPT). Undergraduate students make up only 16.6 percent of total students from SCA.
- Nepal (+20.1 percent), India (+12.3 percent), and Bangladesh (+9.7 percent) saw the fastest growth in the region for AY 2016–2017.
- The number of students coming from India increased by 20,349 students, reaching 186,267 students, though the growth rate was slower than the prior two years. The fastest growth was in OPT, increasing 35.0 percent to 14,804 students. Growth at the graduate level slowed from 19.7 percent in 2015–2016 to just 3.0 percent in 2016–2017.
- India and Nepal remained among the top 25 countries in the world sending undergraduate students to the United States in AY 2016–2017, according to the *Open Doors* report. These countries were in second and thirteenth place, respectively, with Bangladesh joining them at twenty-fifth and Pakistan not far behind. Other notable increases in undergraduate mobility from the region include Pakistan (+13.5 percent), Bhutan (+9.9 percent), Maldives (+8.7 percent), Afghanistan (+7 percent), Turkmenistan (+6.3 percent), and Sri Lanka (+6 percent).
- India, Bangladesh, Nepal, and Pakistan

were also among the top 25 countries in the world sending graduate students to the United States in 2016–2017, according to the *Open Doors* report. Other increases in graduate mobility within SCA include Turkmenistan (+7.7 percent), Kazakhstan (+4.6 percent), and Sri Lanka (+4.6 percent).

Several factors led to the growth in the number of graduate students from the region. Local HEIs often require a foreign terminal degree to join the faculty, fueling a growing interest in foreign doctorate (Ph.D.) programs. A lack of opportunity to pursue research in their home countries leads many students to seek foreign research institutions, especially in the United States. Savvy students understand that careers can be built on the important connections made during graduate studies, so students will prioritize a graduate degree abroad. The high cost of a U.S. undergraduate education is also an important factor causing students to wait to study in the United States.

In some countries, private English-medium secondary schools are focused on preparing students for undergraduate study abroad. Although such schools hesitate to sacrifice class hours to accommodate visiting college and university representatives, EducationUSA advisers may be able to assist institutional representatives in securing a meeting. Advisers are well-placed, well-connected, and able to invite appropriate students to meet representatives either at EducationUSA advising centers or during a college fair.

Students and their families are

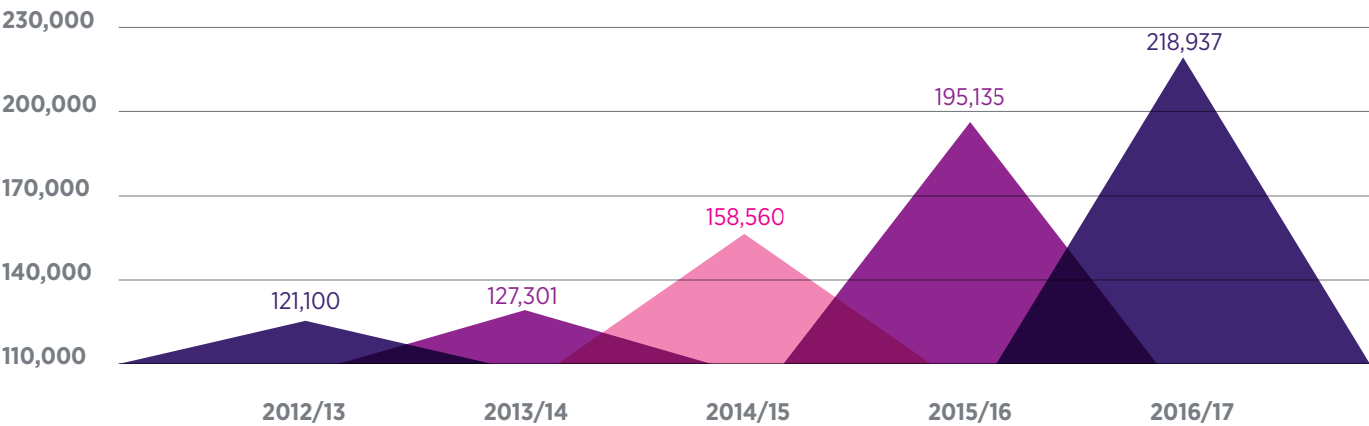
increasingly concerned about safety on campus and in the community at large. Many opt to apply to states and institutions with existing diaspora communities from the local culture or large international populations. Institutions able to demonstrate and address concerns about the safety of international students and their successful integration into the surrounding community will have an advantage.

Gap years are increasingly common among prospective students from the region. Local curriculums are rigorous, which makes it challenging for students to prepare for the required admissions tests. Thus, they will often take a gap year to prepare for the SAT or ACT.

Countries in the Spotlight

Bangladesh. Bangladesh has a long tradition of English language education, a booming education sector, and a rising middle class, all of which combine to make Bangladesh a prime target for student recruitment. Gross domestic product growth averages more than six percent per year. UNESCO reports more than 33,000 students studying abroad from Bangladesh, with the highest numbers in Malaysia, followed by the United States, United Kingdom, Australia, and Germany. The *Open Doors* survey reports a steady flow of Bangladeshi students studying in the United States, with an increase of 9.7 percent for AY 2016–2017. Bangladesh moved up to 25th in the list of countries sending the most students; Bangladesh’s growth rate is the third highest globally (jointly

Student Mobility in the Region (Five-Year Trend)



with Nigeria) and the highest among the Muslim majority countries in the region. Graduate students (Master's degree/Ph.D.) make up 60.5 percent of Bangladeshi students in the United States. The highest growth, an increase of more than 20 percent, was among students enrolling in extended OPT opportunities.

The most popular fields of study include engineering and business with a growing interest in the humanities and social sciences. There are sectors of the population that can afford to fully fund students' studies in the United States, but receiving a scholarship is a matter of pride and prestige. Students pursue higher education opportunities in Australia and the United Kingdom as a result of ease of access to visas, residency opportunities, and perceived affordability. Bangladesh is a relatively small country in area but is the second most densely populated country in the world, with 53 percent of the population younger than 30 years old.

Higher education in Bangladesh has made immense strides, but a foreign degree is still seen as a significant career asset. At the undergraduate level, practical education and skill development are closely tied to access to the labor market, and Bachelor's and Associate degrees offering enhanced vocational skills are popular.

Research opportunities at the graduate level are limited in Bangladesh, and many Bangladeshis acquire a Master's degree in Bangladesh before pursuing a second research-based graduate degree abroad. Competing in international research competitions has grown in popularity in Bangladesh. In 2017, a team from Independent University Bangladesh placed in the top ten in the NASA Mars Rover competition, and a team from Dhaka University placed first in the Facebook Global Digital Challenge. There is a steady growth in Bangladeshi Ph.D. applicants to foreign HEIs, mainly as a result of the local universities' requirement for a foreign Ph.D. degree to join the faculty.

India. By the year 2020, India will be the youngest country in the world. It is estimated that more than half of the total population is younger than the age of 26. Limited capacity and access to quality education and vocational

training continue to be concerns. The growing private education sector provides some relief to the expanding middle class. There are 114 Indian schools offering the International Baccalaureate diploma program and more than 400 high schools offering the International General Certificate of Secondary Education curriculum in India. Such high schools recognize the need for professional college counseling and are hiring staff to meet demands to help students apply to institutions abroad.

Indian students' international education preferences are complex and diverse. At the undergraduate level, the intense nature of academic preparation, emphasis on test scores, and competition to gain admission to a high-quality local educational institution pushes parents and students to consider destinations abroad for higher education. Flexibility of choice and research opportunities are important considerations in the decision-making process. At the graduate level, students do their research and seek programs that will provide them with specific and specialized knowledge to launch their careers. A degree from a top foreign university is highly valued in the Indian job market. Students may seek options within their previous area of studies or seek multidisciplinary programs to further diversify their knowledge base. Students are increasingly attracted to new fields of study in disciplines such as artificial intelligence, data sciences, and data analytics. There is growing interest in practical applications in emerging fields. For example, students are interested in game design and development, animation, filmmaking, graphic arts, music, and sound engineering. Finances, physical safety, research opportunities, and practical training opportunities (such as Curricular Practical Training or CPT, and Optional Practical Training or OPT) are important factors in students' decision-making. Student profiles and their fields of interest vary from region to region within India.

The latest *Open Doors* data shows 186,267 Indian students in the United States in AY 2016-2017, an increase of 12.0 percent compared with AY 2015-2016. The growth in graduate mobility slowed; however, there is continued growth in undergraduate mobility. Graduate students (Master's degree/Ph.D.) make up 56.3

percent of Indian students in the United States, and the highest growth, more than 35.0 percent, is among students enrolled in OPT. There was a 13.9-percent increase in undergraduate students, a growing trend over the past few years.

The majority of Indian students will take out bank loans to finance a portion of their overseas education. On average, bank loans finance about 80 percent of the cost of education, with personal funds covering the remaining 20 percent. Most families save funds in dedicated accounts over time, in fixed deposits, or in Employees' Provident Fund accounts (similar to U.S. retirement accounts). Many also possess fixed assets in the form of land, jewelry, or stocks and mutual funds. Converting fixed assets to liquid assets for proof of finances is a major concern for students.

The reorganization of the Indian higher education sector is an important factor in student mobility. The current government proposed a draft national educational policy to address issues and concerns related to institutional oversight, relevance of higher education offerings, vocational education, and HEI collaborations. This pro-reform stance of the Indian government could lead to several significant changes in the Indian higher education system. For instance, the government has already initiated digitization of all academic records under the National Academic Depository program to provide credible educational documentation to third parties such as HEIs and prospective employers.

Kazakhstan. The overall number of Kazakh students studying in the United States decreased by about 7.0 percent in AY 2016-2017. Although undergraduate numbers decreased by 9.0 percent, graduate student numbers increased by 4.7 percent.

Kazakh students interested in English-language instruction Bachelor's degrees typically first consider Nazarbayev University, the flagship national university that has partnerships with many U.S. institutions. The government's Nazarbayev Intellectual Schools and Nazarbayev University still offer free education to the country's high-performing youth; however, because of limited seats and highly competitive standards of admissions, many elite

South and Central Asia

Kazakh students seek to study abroad. Kazakhstan is a landlocked country with a population of more than 17 million. The rapidly growing economy is largely dependent on the country's oil and gas reserves. Exchange rate issues affect families' decisions about study abroad, with parents and students seeking more affordable educational options. Most consider studying domestically or in China, South Korea, Malaysia, Germany, or Russia. Kazakhstan's new minister of education announced that the education system will gradually become trilingual in 2018, and the sciences are expected to be taught in English in all schools across the country. Kazakhstan has more than 66,000 students studying abroad but less than 3.0 percent choose to study in the United States.

Pakistan. In AY 2016–2017, there was a 14.2-percent increase over the previous year of Pakistani students (7,015) studying in the United States, according to *Open Doors*. The increase was equally split among undergraduate and graduate students, with both groups increasing approximately 13.5 percent over the previous year. The major cities of Karachi, Lahore, and Islamabad/Rawalpindi have large populations of students who apply to study abroad, and cities such as Faisalabad, Sialkot, Gujrat, and Gujranwala also have large numbers of prospective students interested in pursuing higher education at foreign institutions. Colleges and universities planning to recruit in Pakistan should consider a broad range of cities for recruitment. The U.S. Educational Foundation in Pakistan administers several U.S. government

academic exchange programs and hosts all three of Pakistan's EducationUSA advising centers. Through these exchange programs, 19,000 exchange participants from Pakistan have come to the United States since 1946. Pakistani youth are academically strong and globally aware as a result of widespread internet use and exposure to 20 television news channels now available in the country. These well-informed young Pakistanis are increasingly interested in U.S. study options and are able to make discerning choices when comparing international study options.

Sri Lanka. Despite the 27-year civil war that began in 1983 and ended in 2009, the country maintains some of the highest literacy rates in South Asia. The population is about 22 million, slightly less than the population of Texas, with 40 percent under the age of 24. While primary, secondary, and higher education are free and accessible, capacity and quality are the primary challenges. Only ten percent of the 200,000 who sit for the national Advanced Level exam is accepted to local universities. As a result of the highly selective local admissions process and limited capacity of local institutions, Sri Lankans will continue to explore studying abroad.

The number of students enrolling from Sri Lanka grew 5.9 percent to 3,263 students in the United States in AY 2016–2017. The number of graduate students increased by 4.6 percent, and the number of undergraduate students increased even more, by 6.1 percent. However, graduate students make up a larger portion—50

percent compared with only 33 percent pursuing undergraduate education in AY 2016–17—of the Sri Lankan students pursuing studies in the United States.

Growth in the local private education sector has been strong and somewhat controversial. The Ministry of Higher Education recognizes fewer than 20 private HEIs. Wealthier families prefer private education opportunities to prepare their children to study abroad. An unregulated segment of the private sector operates “affiliated” institutions, which offer degree programs in partnership with foreign institutions. UNESCO reports that for 17,790 outbound students from Sri Lanka, the leading destination for study abroad is Australia, followed by the United States, United Kingdom, and India.

The number one factor that motivates Sri Lankan students is improved employment prospects at home. Most students gravitate toward existing Sri Lankan diaspora communities abroad. The population of outbound students, although very mobile, is quite small compared with regional counterparts in South Asia. One way in which EducationUSA lends support to students who prepare to study abroad is through outreach to the “affiliated” private institutions offering transfer opportunities to institutions abroad. Prospective undergraduate students from the government-supported institutions will likely need generous scholarships to study in the United States. EducationUSA Sri Lanka conducts Competitive College Clubs, cohort advising, and implements the Opportunity Funds program.

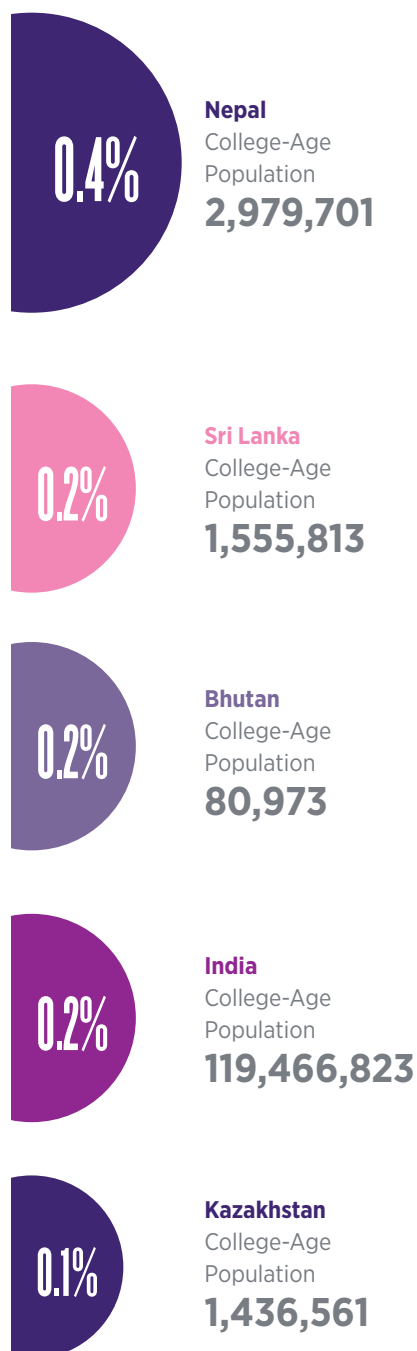
Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students in the Region (Five-Year Trend)

Country	2012/13	2016/17	%Change
India	96,754	186,267	92.5%
Bangladesh	3,828	7,143	86.6%
Pakistan	4,772	7,015	47.0%
Nepal	8,920	11,607	30.1%
Uzbekistan	445	505	13.5%

92.5%

India has the largest percentage growth in the region over the last five years (**with over 100 students**)

Five Countries of Origin in the Region with Highest Per Capita College-Age Student Mobility to the United States



Source: UNESCO Institute of Statistics; Indicator: 2015 Population of the official age for tertiary education, both sexes

Uzbekistan. Uzbekistan is Central Asia's most populous country with more than 30 million people, and more than 64 percent younger than age 30. More than 50 percent of Uzbek students in the United States are pursuing an undergraduate degree, including students at community colleges. The most popular fields of study are business administration, information technology/computer science, and economics/finance. Community colleges and short-term or English as a Second Language courses attract attention and interest. Students continue to pursue higher education in Russia, China, and the United Kingdom as a result of the ease of access and affordability. In spring 2017, the new president signed the resolution "On Measures to Further Develop the System of Higher Education." Under the new program, the Uzbek government invites at least 350 highly skilled foreign instructors and scientists to teach and research in relation to the development of Uzbekistan's colleges and universities each year, including the revision of teacher and specialist training to meet international standards. Uzbek universities are now required to establish partnerships with foreign universities. The higher education system will introduce advanced international experience to the education process and improve the skills of teachers and scholars via closer relationships with leading foreign educational and scientific institutions.

What to Expect in the Next Three to Five Years

- As South Asia's youth come of age, an increasing number of students will study abroad. Across the region, competition for limited seats at respected local undergraduate institutions, particularly in engineering and business, may result in an increase in undergraduate applicants to the United States.
- The U.S.-Pakistan university partnership initiative, funded by the Public Affairs section of the U.S. embassy in Islamabad, establishes long-term relationships between Pakistani and American HEIs. These three-year partnerships promote faculty professional development, curriculum reform, joint research, and increased

mutual understanding between Pakistan and the United States through sustainable peer-to-peer relationships. Eighteen partnerships have been established, and their success is expected to lead to more institutions seeking comparable programs.

- In Afghanistan, decades of war, civil unrest, internal conflicts, and political instability have destroyed the country's basic social service delivery mechanisms and have affected the educational system. The Ministry of Education's priority is to increase the share of faculty who hold a Master's degree or Ph.D. There is a strong push to continue to support female education at all levels. Afghanistan's education system desperately needs to produce a new generation of professional workers for the government and for the private sector who can lead the country into a more productive future. The government's aim is to raise university enrollment overall, with a focus on women and girls and more graduate and doctoral programs. As the country rebuilds its educational infrastructure and increases capacity, local institutions will look to the United States and other countries to build partnerships and create linkages.
- China's ambitious "One Belt One Road" project, which aims to develop infrastructure across Central Asia, South Asia, and on to Europe, includes education as a priority element. Future collaboration will attract prospective students to seize opportunities in the East Asia region.

Regional Student Totals Top Five Countries of Origin

Country	2016/17	% Change 2015/16
India	186,267	12.3%
Nepal	11,607	20.1%
Bangladesh	7,143	9.7%
Pakistan	7,015	14.2%
Sri Lanka	3,263	5.9%

South and Central Asia



Virtual and Social Media Usage

- Across the region, internet access is widely available but varies greatly in speed and accessibility outside of big cities. Where it is available, internet is easily accessible and most commonly used through mobile devices.
- Facebook, YouTube, Instagram, Snapchat, and WhatsApp are popular throughout the region. Telegram is also popular in Central Asia, where social media platforms are among the strongest ways to promote study programs, scholarships, and EducationUSA center events.
- Unreliable internet connections can't always sustain webinars and remote sessions; however, messaging tools and social media announcements are still highly effective. Messages about student success stories and short, engaging bits of information are most popular.
- EducationUSA advisers in India, Nepal, and Sri Lanka host virtual advising through weekly live chats on Facebook.

- EducationUSA at the Edward M. Kennedy Center in Dhaka, Bangladesh, schedules regular Skype sessions for students to interact with U.S. institutions.
- In Afghanistan, few people have regular internet access. Information is shared via SMS text messages. To send information via SMS about a U.S. institution or program, contact the EducationUSA advisers in Kabul for assistance.
- In Turkmenistan, restrictions on popular social media remain blocked and the government has denied access for almost all networking websites. Students primarily rely on traditional methods of advising: in-person, telephone, and email.
- YouTube, banned since 2012, became available to Pakistanis in 2015. Many Pakistanis continue to use alternative websites such as Vimeo and Daily Motion.

Successful Recruiting Strategies

- Connect with students through EducationUSA college and university fairs throughout the region. Graduate and undergraduate applicants appreciate the opportunity to meet institutional representatives in person, discuss available options, and have questions answered to feel well informed when making decisions about where to apply.
- Initiate summer programs for high school students. A positive experience at a summer program encourages students to continue toward a degree program at an institution.
- Connect and meet the EducationUSA advisers at centers in the region. Participate in informational seminars that showcase the breadth of U.S. higher education and highlight the strengths of U.S. educational institutions or offer insights into specific fields of study that might not be familiar. Although sessions must be strictly informational in nature

and not promotional, the institution's presence will attract attention and may enhance recruitment efforts.

- Combine multiple partial financial aid awards into larger awards for fewer students. Providing larger awards serves as a magnet to attract good students who in turn share their positive experiences with peers, encouraging the peers to apply. Word of mouth is the most effective recruiting tool in the region.
- Encourage alumni to become engaged and represent the college or university at EducationUSA fairs and to visit EducationUSA centers to meet students and conduct information sessions.
- Provide opportunities for parents of enrolled students to meet parents of prospective students to provide a sense of security to families anxious about sending children abroad.
- Clearly inform prospective students of options for internship possibilities and other practical training experiences. Career prospects greatly influence and pique the interest of applicants in the region.
- Talk to applicants and their parents via video chat and take advantage of multimedia capabilities and webinar options at advising centers. Students appreciate the opportunity to speak directly to an admissions representative or student.
- Expand the list of cities considered for recruitment destinations. EducationUSA can advise on how to effectively go beyond the capital cities to smaller cities and rural areas to reach students eager to expand their horizons through higher education abroad.
- Showcase success stories. Emphasize the value of a degree from a particular institution, options for affordable financing and scholarships, and the successful career trajectories of alumni. Publicize the successes of international students through the EducationUSA centers in their home countries. Advisers see a lot of interest in such highlights when they are shared on social media.

Foreign Government and Private Funding
Many governments in South and Central

Asia allocate funding each year for students to pursue higher education overseas. Because of lower tuition, proximity, and similar cultural traditions, however, students with government funding often attend schools closer to home in countries such as the United Kingdom, Turkey, and India. Many students still desire to study in the United States, and institutions able to offer competitive tuition or discounts have a recruiting advantage.

Bhutan. The Scholarship and Student Division at the Department of Adult and Higher Education, Ministry of Education, Royal Government of Bhutan hosts and manages scholarships offered by American institutions specifically for Bhutanese students. If interested in designing a scholarship for Bhutanese students, please contact the New Delhi-based Regional Educational Advising Coordinator (REAC) to facilitate meetings with the Ministry of Education. For more information, visit www.education.gov.bt/scholarship.

Kazakhstan. Since 2011, the government's Bolashak scholarship program has funded professional development and technical skills development to address a shortage of specialists in fields related to economic development. The Bolashak program includes funding for arts and mass media industry professionals along with public servants, academic and medical staff, engineers, and technical workers. The program provides full funding for study in the United States, including a monthly stipend for living expenses, roundtrip airfare, textbook allowances, and health insurance. Students can use scholarships for general English studies, Master's and Ph.D. programs, as well as short-term scientific training opportunities (www.bolashak.gov.kz/en/).

Sri Lanka. The Sri Lankan government encourages its students to study abroad with country-specific scholarships to a variety of countries including Russia, China, Japan, New Zealand, and India for both undergraduate and graduate degrees,

U.S. Study Abroad

Top Five Receiving Countries in the Region

Destination	2015/16	% Change
India	4,181	-8.6%
Nepal	370	0.5%
Sri Lanka	145	19.8%
Bhutan	114	178.0%
Kyrgyzstan	59	96.7%

Five Countries (with over 25 students) with Highest Percentage Growth, U.S. Students in the Region (Five-Year Trend)

Country Name	2011/12	2015/16	% Change
Bhutan	28	114	307.1%
Kazakhstan	26	56	115.4%
Kyrgyzstan	37	59	58.5%
Nepal	257	370	43.9%
Sri Lanka	102	145	42.2%

South and Central Asia

however there are no scholarships currently for students to study in the United States.

Uzbekistan. The Islam Karimov Foundation, established in 2016 in honor of the late

president, runs a competition to select gifted young people to study in American and European Master's programs. The grant is open for the following fields of study: natural sciences (renewable energy

from the end and chemistry), water and land resources management, engineering technology, food technology, food safety, food production and marketing, architecture (urban development and protection and restoration of architectural monuments), design (product design, industrial and architectural design), and fine arts/painting. The fund fully covers tuition and living costs in foreign countries for as long as two years. Uzbek students generally can afford as much as USD\$10,000 per year to study abroad.

Best and Worst Times of the Year to Interact with Students (Face to Face and Virtually)

With regard to holidays, note that the Muslim calendar is lunar-based, and dates vary from year to year. Please check the U.S. embassy websites and with EducationUSA advising centers for a complete list of annual holidays. Exam periods and religious holidays can vary because not all countries or school systems within a country are on the same academic timetable. Advisers try to accommodate representatives' needs and plans throughout the year.

Afghanistan. The best times to visit are October to November and February to April.

Bangladesh. The best times to visit are January to April and July to December. Avoid public holidays (e.g., Ramadan and Eid holidays).

Bhutan. The best time to visit is from March to June. Avoid travel between November and January during exams, school closings, and holidays.

India. The best time to visit India to recruit both undergraduate and graduate students is from April through December. To recruit graduate students, visit between mid-January through mid-March. States adhere to local holidays in addition to national holidays. Check the U.S. embassy in New Delhi's list of holidays to note regional holidays.

Kazakhstan. The best time to visit is October to April. Avoid visiting during major exam periods from January to February and May to June.

Kyrgyzstan. The best time to visit is October to February. Avoid exams and school holidays from May to August.

Maldives. The best time to visit is from February to July but be sure to avoid Islamic holidays. The worst times to visit are May and October when high school exams are scheduled and November to January when schools and universities are closed.

Nepal. Visit any time of the year except exam season from May to June and festival season, predominantly October but may vary according to the year.

Pakistan. The best time to visit is September to February. Avoid Ramadan, Eid, exams, and school holidays from May to August.

Sri Lanka. The best times of the year to visit are January to February, May to July, and September to November. Avoid visiting during local exams and holidays in March, April, August, and December.

Tajikistan. The ideal time for U.S. institutions to visit is September to October and April to May. Students are off school in December, March, and for summer break from June to August.

Turkmenistan. The best time to visit is from the end of June to November. The major exams period runs from late May to approximately June 20 and should be avoided.

Uzbekistan. The best times to visit are September to November and February to May.

Regional EducationUSA Events

Use the EducationUSA website to find country-specific information about upcoming fairs, webinars, and other events and activities. The most recent EducationUSA SCA Regional Forum was held in Kathmandu, Nepal, January 31–February 3, 2018. The event brought together 80 representatives of 71 colleges, universities, associations, and testing organizations as well as all of the advisers in the region. The event closed with a full-day fair, attracting almost 2,200 Nepali prospective students. Regional forums are held approximately every three years.

Fairs and Conferences

In addition to the many in-person student recruitment opportunities offered through participation in EducationUSA fairs and conferences, representatives of U.S. institutions often capitalize on these events to receive a country briefing from EducationUSA advisers, meet with U.S. Embassy Public Affairs and Consular Affairs staff (subject to scheduling availability), make a presentation at an EducationUSA advising center, or visit a local high school or college. Contact the EducationUSA staff organizing the event to explore options for maximizing the impact of participation. Visit www.educationusa.state.gov and select "Find an Event" to see the latest upcoming fairs, conferences, center events, and more:

- **Afghanistan.** For three consecutive years, the annual education expo has attracted large numbers of interested students. To share information at the expo, contact an EducationUSA adviser at iqbali@sesoaf.org.
- **Bhutan.** The Bhutan Chamber of Commerce and Industry organizes an annual International Education Fair in Thimphu in March. For details, please

contact REAC Ishrat Jahan at ijahan@educationusa.org.

- **India.** The EducationUSA tour in India is hosted in partnership with EducationUSA host institutions. The tour takes place in the fall and travels through as many as eight cities. EducationUSA India also hosts alumni fairs in December/January. For details, contact REAC Ishrat Jahan at ijahan@educationusa.org.
- **Kazakhstan.** EducationUSA centers participate in spring and fall international student fairs, the Begin Group spring and fall international education fairs, and the winter Globus Education Fair.
- **Kazakhstan/Kyrgyzstan.** The EducationUSA advising centers and U.S. Embassies in Kazakhstan and Kyrgyz Republic invite accredited U.S. higher education institutions to the 2018 EducationUSA Central Asia Fall Tour through Astana, Aktobe, Almaty, and Bishkek, October 6 - 16. Last year, 24 U.S. institutions participated and met with over 2,500 students. For details, contact EducationUSA in Kazakhstan at edusakztour@americancouncils-kz.com.
- **Pakistan.** The annual Dawn Education Expo in Pakistan runs for one week in February and travels from Islamabad to Lahore and Karachi. The event attracts more than 10,000 participants. In addition, EducationUSA hosts a fall and spring tour to Islamabad, Karachi, and Lahore. The fall fair is scheduled from September 30–October 9, 2018. In spring 2018, 27 U.S. universities attended. For information, contact EducationUSA Pakistan at advising@usefpakistan.org.
- **South Asia Tour.** Join the tour through Nepal, Pakistan, and Sri Lanka. The South Asia tour includes college and university fairs, secondary school visits, cultural activities, and visits to local universities relevant for graduate-level recruiters. The costs are deliberately kept as low as possible to offer an affordable recruitment opportunity. The tour takes place in the spring and fall each year, traveling through six cities. For details, email SouthAsiaTour@educationusa.org.
- **Turkmenistan.** The government sponsors an annual international



exhibition and scientific conference titled “Education, Sport, and Tourism in the Era of Power and Happiness” in Ashgabat in November. EducationUSA will be attending the GOTX Education Fair October 9–10, 2018, in Ashgabat and encourages U.S. higher education participation. The EducationUSA advising center in Ashgabat reaches thousands of high school and university students, parents, teachers, professors, and various organizations at this event. For details, contact the EducationUSA center at eac@americancouncilstm.org.

- **Uzbekistan.** The Expocontact Ltd. Company under the Chamber of Commerce and Industry of the Republic of Uzbekistan organizes an annual Education and Career Fair with support from the Ministry of Higher and Secondary Specialized Education of Uzbekistan. More than 30,000 high school students, university students, and faculty attend. This fair occurs twice a year, usually in early April and mid-September. U.S. institutions are invited to contact the advising center for more information.

U.S. Study Abroad in the Region

Language is a common reason for U.S. students to study abroad. Russian is widely spoken in Kazakhstan, which means it is an excellent site for Russian language learning for foreign students. Tajikistan historically has been a popular destination for students to study Farsi, and in 2017, more than 100 Americans were studying and mastering languages (Farsi, Dari, Uzbek, Tajiki, Russian, and Pashtu) in Tajikistan through various programs, such as the Critical Language Scholarship program, National Security Language Initiative-Youth, and Eurasian Regional Language Program.

SCA overall saw a decrease of three percent in the number of U.S. study abroad students in 2015–2016 compared with the previous year, with 4,980 American students traveling to different countries in the region. India continues to attract the largest number of study abroad students in the region, with more than 4,000 American students (84.0 percent) in 2015–2016, followed by Nepal with 370 students (7.4 percent). For AY 2015–2016, Bhutan, Kyrgyzstan, and Sri Lanka saw a slight increase in the number of American study abroad students.

Western Hemisphere

Regional EducationUSA Profile

Antigua and Barbuda, Argentina, Bahamas, Barbados, Belize, Bolivia, Brazil, Canada, Chile, Colombia, Costa Rica, Cuba, Dominica, the Dominican Republic, Ecuador, El Salvador, Grenada, Guatemala, Guyana, Haiti, Honduras, Jamaica, Mexico, Nicaragua, Panama, Paraguay, Peru, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Suriname, Trinidad and Tobago, Uruguay, Venezuela

142

EducationUSA Advising Centers in the Region

74 Comprehensive
53 Standard
15 Reference



The Western Hemisphere (WHA) has 142 EducationUSA centers:

- 20 comprehensive, 13 standard, and one reference center in the Andean sub-region
- 30 comprehensive, 16 standard, and eight reference centers in the North America, Central America, and Caribbean sub-region
- 24 comprehensive, 24 standard, and six reference centers in the Southern Cone sub-region

Advising centers in WHA are located at U.S. embassies and consulates, bi-national centers (BNCs), American Spaces, Fulbright Commissions, local higher education institutions (HEIs), national government ministries, public libraries, and non-profit organizations. Four new centers opened within the past year: three in Brazil (Belo Horizonte, Caxias do Sul, and Porto Alegre) and one in Chile (Santiago). The region has 156 advisers, 49 percent of whom are based at BNCs.

EducationUSA advising centers in the region offer at least one annual pre-departure orientation open to the public either in-person or virtually. Advisers collaborate with consular officers, U.S. higher education admissions, and international student services officers as well as alumni during these orientations in an effort to offer comprehensive information to the students and their families. Centers in countries with foreign government initiatives organize pre-departure orientations tailored to the needs of those programs.

EducationUSA fairs take place at least once a year in Mexico, Central America, the Caribbean, and South America,

which attract massive crowds of qualified students interested in study in the United States. Regional fairs in WHA highlight undergraduate, graduate, intensive language, and short-term programs; there are also specialized fairs and country-specific tours throughout the region. As a key public diplomacy tool for U.S. and local governments, fairs often include the presence of high-profile government officials. EducationUSA centers frequently support Education Trade Missions and state educational consortia visits organized by the U.S. Department of Commerce. EducationUSA advisers in the region also support U.S. embassy- and consulate-organized alumni fairs at which U.S. government officials share their experiences as college or university students with the public and distribute information about their alma maters.

EducationUSA advisers participate in local as well as commercial fairs organized by private organizations to promote exchange opportunities in the United States. EducationUSA advisers at these fairs host information sessions and interact with the public in the exhibit halls.

Hosting U.S. HEI representatives is a high priority for WHA EducationUSA advising centers. During these visits, advisers set up group presentations, open houses, one-on-one appointments, and specialized workshops for tailored audiences at EducationUSA centers and partner institutions. In addition, EducationUSA advisers record HEI representatives' workshops, interviews, videos, and podcasts to share virtually with the public through social media outlets.

Over the past year, WHA EducationUSA advisers hosted more than 400 webinars

to connect U.S. college and university representatives with local students, parents, and counselors to inform them about U.S. higher education opportunities and explain the application process. U.S. embassies and U.S. HEIs co-host EducationUSA webinars and viewing parties for virtual events such as EducationUSA Interactive webinars.

Advisers use virtual advising to target non-traditional audiences in remote locations like Patagonia, the Galapagos Islands, the Amazon, and the Canadian Arctic, as well as in countries or areas of a country in which the current political and security environment limits the possibilities of in-person presentations, such as in Venezuela. They use social media tools such as Facebook, Google+ Hangouts, Skype, and WhatsApp to promote EducationUSA services.

With at least one EducationUSA Facebook fan page in each WHA country and nearly 300,000 followers, EducationUSA advisers are expanding their reach through increasingly popular social media platforms such as YouTube and blogs, demonstrated by a growth of around 55 percent in both views and contacts.

Advising centers in the region connect with current international students in the United States as well as alumni of U.S. institutions and U.S. government programs to support activities such as alumni fairs, cohort advising, and outreach. EducationUSA advisers throughout the WHA region engage with U.S. students, volunteers, and professionals to promote the United States as a higher education destination. For example, Fulbright English Teaching Assistants (ETAs), Peace Corps Volunteers (PCVs), Gilman Scholars, and U.S. students studying abroad at local universities collaborate with EducationUSA on various levels, whether delivering writing workshops, tutoring students in English, or conducting outreach visits in remote areas.

Many universities overseas continue to express interest in developing and strengthening partnerships with U.S. HEIs to increase academic exchanges between the United States and WHA. To strengthen internationalization efforts, EducationUSA advisers in several countries act as liaisons between U.S. and local universities,



offering capacity-building workshops on best practices for study abroad, funded by the Bureau of Educational and Cultural Affairs' (ECA) USA Study Abroad Branch.

The Opportunity Funds program is currently available through EducationUSA centers in Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Paraguay, Peru, Uruguay, and Venezuela. During the past year, 40 students from across the WHA region were offered admission to U.S. colleges and universities and accepted more than \$3,000,000 in scholarship offers.

Regional Overview

Canada, Latin America, and the Caribbean make up the U.S. Department of State's WHA region, a diverse area spread across 35 countries that boasts a combined total population of approximately 900 million. With five countries among the top 25 sending countries of international students to the United States (Canada, Mexico, Brazil, Venezuela, and Colombia), and 106,720 students in the United States during the AY 2016–2017, the WHA region is second only to Asia in terms of international student mobility to the United States. With steady growth in the numbers of undergraduate and graduate students,

Western Hemisphere

WHA represents 9.9 percent of the global figure of international students in the United States.

In spite of economic and political challenges throughout the region, the economy in WHA continues to be generally stable. Petroleum, mining, agriculture, manufacturing industries, and services, including banking and tourism, continue to be a source of wealth for the majority of WHA countries. As a result, the Americas continue to allocate substantial resources to expand science, technology, and innovation as well as to develop a strong, capable workforce to continue growing local and regional economies. Advisers report that WHA students' top choices in 2017 for academic programs in the United States were in business and entrepreneurship; science, technology, engineering, and mathematics (STEM) fields; and social sciences.

Many universities and research centers throughout WHA have a new or increased focus on internationalization. In some countries, industry is investing in academia, and public-private partnerships to fund international educational initiatives are becoming more common. Workforce development has become a priority in bilateral dialogues, with a resulting focus on partnerships between non-traditional institutions such as technical universities and U.S. community colleges, supported by the private sector.

Teacher training through exchanges and virtual platforms is increasingly a key part of national and regional educational

programs and policy. Governments are focused on strengthening teachers' language and methodological skills and supporting their capacity-building efforts across the region. Many local governments are funding short-term English language programs for students and teachers, now more readily available in non-English-speaking WHA countries.

The leading education diplomacy initiative for the WHA region is the *100,000 Strong in the Americas* Innovation Fund—the public-private sector collaboration between the U.S. Department of State, Partners of the Americas, and NAFSA—leveraged by contributions from private sector entities, foundations, regional education partners, and universities. The Innovation Fund grant competitions encourage U.S. HEIs to forge partnerships with other universities in the Americas to create new student exchange and training programs to and from the region. Since its inception in January 2014, a total of 168 Innovation Fund grants have been awarded to teams of 325 HEIs from 25 countries. Forty-one U.S. states benefit from these partnerships. More than 1,750 HEIs form part of the Innovation Network (1,000 of those in the United States). EducationUSA centers and U.S. embassies encourage and support HEIs to create partnerships using these grants to increase student mobility. Bi-national centers are eligible to submit Innovation Fund grant proposals in partnerships with WHA and U.S. universities and colleges. To stay informed about 100,000 Strong in the Americas Innovation Fund grant competitions,

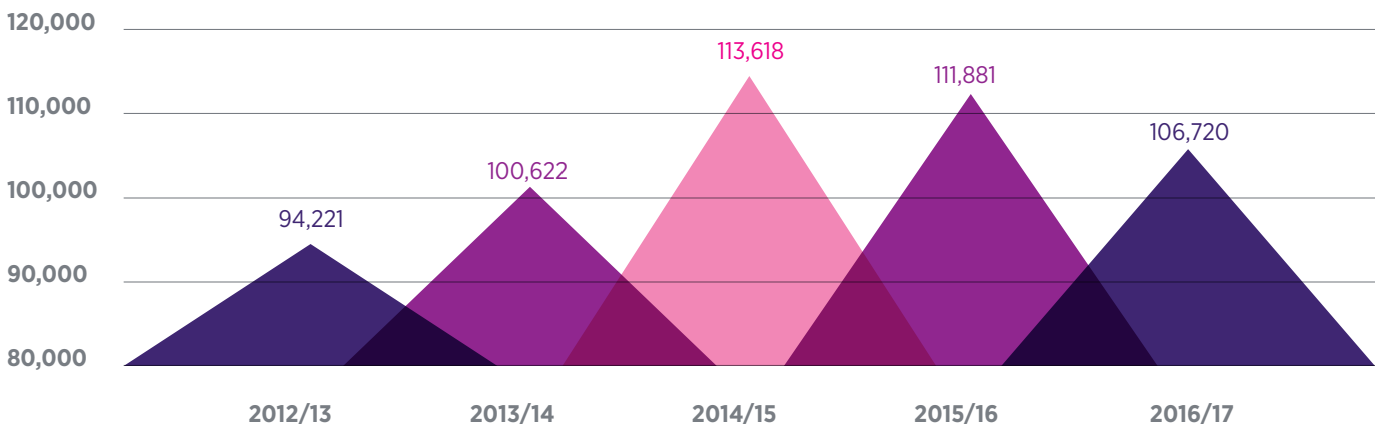
workshops, and special events, please visit www.100kStrongAmericas.org.

Though WHA seems to be a cohesive region, its languages, cultures, and educational systems vary by sub-region. Educational systems follow the British, French, Spanish, Portuguese, and Dutch models in combination with regionally developed credentialing models aimed at achieving standardization in the sub-regions. Academic calendars vary across the region, some of which make it difficult for students to submit the required documents on time for U.S. college and university admissions deadlines.

WHA countries have diverse economies and deep disparities in gross domestic product (GDP) per capita and purchasing power. Access to quality education at the primary school level and beyond is an issue for socially excluded communities across the region. Access to telecommunications varies greatly. Although on average, 65 percent of people in WHA have internet, internet usage ranges from 12 percent in Haiti to around 30 percent in most of Central America to more than 70 percent in the most prosperous countries in South America and 90 percent in Canada.

Flight options in WHA can be limited in that there are few regional hubs to facilitate direct travel between countries. In Central America and the Caribbean, flights typically connect through Miami, San Salvador, and Panama. In South America, Bogota, Lima, Santiago, Buenos Aires, and Sao Paulo are the major hubs.

Student Mobility in the Region (Five-Year Trend)



Flight travel between smaller cities is not always frequent. Ground transportation may be the only option for traveling within smaller countries. Travelers to the region should refer to the U.S. Department of State travel advisories for up-to-date guidance and recommendations, paying careful attention to local conditions.

Recent Trends

- During the past year, EducationUSA advisers have addressed increasing questions from students related to security concerns about U.S. campuses, obtaining student visas, and whether they will be welcome in the United States. EducationUSA advisers are working hard to demystify issues, explaining to students the actual environment in the United States, sharing examples of inclusion, and highlighting the benefits of U.S. study. Advisers have been pointing to the #YouAreWelcomeHere campaign message from HEIs across the country as evidence of campus, community, and state and local government welcome to international students. Such messages have been helpful to reassure students and their parents that U.S. campuses are truly dedicated to welcoming international students and are interested in their success and well-being.
- Local political and economic conditions in WHA continue to drive mobility to the United States. Instability and safety concerns are factors that encourage some families to send students abroad. Economic recessions force young professionals to delay graduate studies or look for more affordable options. Despite the cost of a U.S. higher education, many students in the region recognize its value and are willing to invest in it, resulting in modest increases in mobility to the United States. For example, Bolivia had a 5.7 percent increase of students studying in the United States in AY 2016–2017.
- Diasporic connections and offers of in-state tuition rates continue to attract WHA students to northeastern, southern, and western U.S. states. In the case of Mexico and Canada, as a result of their proximity to the United States, student interest is concentrated in states near the borders of those countries. An increasing number of international students appears to be expressing a preference for enrolling in institutions located in predominantly urban and coastal areas of the United States where they believe they will be welcomed and feel safer.
- Many students within the Caribbean community choose to study at the regional University of the West Indies. In an effort to retain more students in the region, Caribbean governments are beginning to transform other local HEIs from two-year to four-year models. Institutions seek to internationalize their campuses and build partnerships with U.S. institutions to improve the quality of their academic programs and attract more students by offering dual degrees, increasing transfer options for students, and facilitating faculty exchanges. The United States remains the top study destination for students from the Caribbean. The #YouAreWelcomeHere campaign has had a significant effect in assuring students from the Caribbean that they are welcome in the United States.
- The worsening of Venezuela's political and economic environment continues to expedite the flight of professors to other countries in the region. This loss of faculty has deeply affected the quality of local higher education and academic options available, resulting in more students looking for educational opportunities abroad. The United States continues to be the preferred study destination; however, Venezuelans who hold dual citizenship with European countries find it more affordable and easier to study there than in the United States. For economic reasons, many Venezuelans are also pursuing study options in nearby countries.
- In some countries, changes in government have led to more internationalization initiatives and partnership agreements to increase two-way exchanges between U.S. and local universities. For example, several Argentine higher education associations attended a 2017 meeting of the American Association of State Colleges and Universities (AASCU) in Washington, DC, where they established agreements to promote exchanges between the two countries. This collaboration is a direct result of a May 2017 study abroad capacity-building workshop hosted by Fulbright and

EducationUSA in Argentina and funded by ECA's USA Study Abroad Branch. This workshop initiated partnership discussions between Argentine and U.S. higher education associations.

- Central American countries continue to report steady northbound mobility with a high percentage of students enrolling specifically in two-year institutions. Honduras leads this sub-region in total number of students studying in the United States, with El Salvador being the top sender of students from Central America to U.S. community colleges. In the past year, the U.S. Department of Commerce organized and EducationUSA supported several education missions to Costa Rica and Honduras, highlighting two-year institutions as viable options for students from the region.
- Throughout WHA, especially in North and Central America and the Caribbean, there is increased interest in short-term and summer programs as well as pre-professional experiences including internships in the United States.
- A new trend in Brazil is the U.S.-Brazilian dual high school diploma. In cases where local high schools do not offer required English language courses for these diplomas, some BNCs in Brazil step in to offer these subjects. Such dual diploma programs have significantly increased the number of prospective students interested in applying to undergraduate programs in the United States.

Countries in the Spotlight

Brazil. There are 35 EducationUSA offices in Brazil, with a total of 42 EducationUSA advisers that cover a country similar in size to the United States. Advisers hold Facebook Live events to accommodate huge numbers of students that want information on U.S. study options; some Fulbright ETAs mentor EducationUSA students; and EducationUSA Brazil organizes general fairs and fairs that target specific fields of study such as the new Master of Laws (LLM) fair circuit. According to UNESCO statistics, the United States continues to be the leading destination for Brazilians, and Brazil ranks 10th in the world in sending students to the United States. GDP has grown in the past two quarters, and exports grew by double digits at the end of 2017. For 2018 and 2019, 2.5-percent economic growth is predicted.

Western Hemisphere

Brazil's Ministry of Education recently announced a major reform in secondary education, launching a new model of high school diploma with a flexible curriculum. Expected to be implemented in 2018, this cross-disciplinary and competency-oriented model, combined with English preparation, will better prepare prospective candidates for degree-seeking programs in the United States.

A rising number of private K-12 schools are implementing bilingual education in their curriculum to respond to families' desire to better prepare their children to succeed in an increasingly globalized society. During the past two years, more schools have begun offering dual Brazilian-U.S. high school diplomas. The majority of Brazilian students that receive these diplomas plan to pursue a college degree in the United States, and EducationUSA advisers have been targeting outreach visits to them.

Many Brazilian universities are establishing partnerships to introduce U.S. educational models, such as the one between Pontifical Catholic University (PUC) Parana and Kent State University, which will launch the first liberal arts dual degree in Brazil. EducationUSA offers an annual roadshow college fair circuit, ending in the host city of the large conference of the Brazilian Association for International Education (FAUBAI), to help facilitate more U.S.-Brazil partnerships. Brazilian universities have increased the number of classes taught in English to attract more international students, and those with state-of-the-art facilities are research partners in STEM fields,

taking advantage of specialties such as Brazil's expertise in undersea petroleum exploration and drilling. The Brazilian government requires all petroleum companies operating in Brazil to donate a percentage of their income to Brazilian universities to fund research.

Canada. The fifth largest sender of international students to the United States (*Open Doors* 2017), Canada offers great potential for expansion in student exchanges and academic mobility. With approximately 200 Canadian HEIs and a 12-percent college-age population, Canadians are seeking opportunities to study across the border. Based on historically low study abroad patterns (only 3.1 percent of college students engage in exchanges), Canadians are looking for access to diverse academic opportunities and specialized programs that are unavailable in Canada.

Canada has the world's 16th largest economy and highest GDP per capita in WHA. Its most prominent sectors are: services (70.5 percent), industry (28.9 percent), and agriculture (1.6 percent). Canada states that its immigration policies should be open and welcoming to demonstrate the government's priority to increase qualified human capital. Provincial governments and ministries have resources available for training and capacity building to strengthen priority economic sectors. As Canadian HEIs are generally less expensive than U.S. counterparts, most students considering U.S. studies are seeking articulation agreements that include discounts in tuition and scholarships.

With these issues in mind, Canadian HEIs continue to expand their internationalization efforts for Canadian students, mainly focusing on partnerships and sustainable pathways to promote short-term exchanges for their students. Consortium-like working groups are being supported in these efforts, such as the Ontario Academic Exchanges working group.

Canada has one EducationUSA advising center, based at the Fulbright Commission in Ottawa. The adviser collaborates with the U.S. embassy and consulates across Canada to multiply outreach efforts. EducationUSA Canada relies actively on virtual tools to deliver relevant and timely content to interested students. In addition, EducationUSA Canada provides training and support to local college counselors and coordinates outreach events open to the public.

Chile. In AY 2016–2017, 2,523 Chilean students were studying in the United States, which, according to UNESCO, continues to be the leading study destination for Chileans. Although there was a 17-percent increase in Chilean undergraduates at U.S. HEIs in AY 2015–2016, the number stayed basically flat in AY 2016–2017. The nearly 30-percent increase of students attending two-year colleges in AY 2016–2017 is also notable. At the graduate level, there was a slight decrease in AY 2016–2017 in students going to the United States.

After four years of discussions, the Chilean congress approved the Higher Education Bill, which will take effect in 2018. The new bill mandates free universal

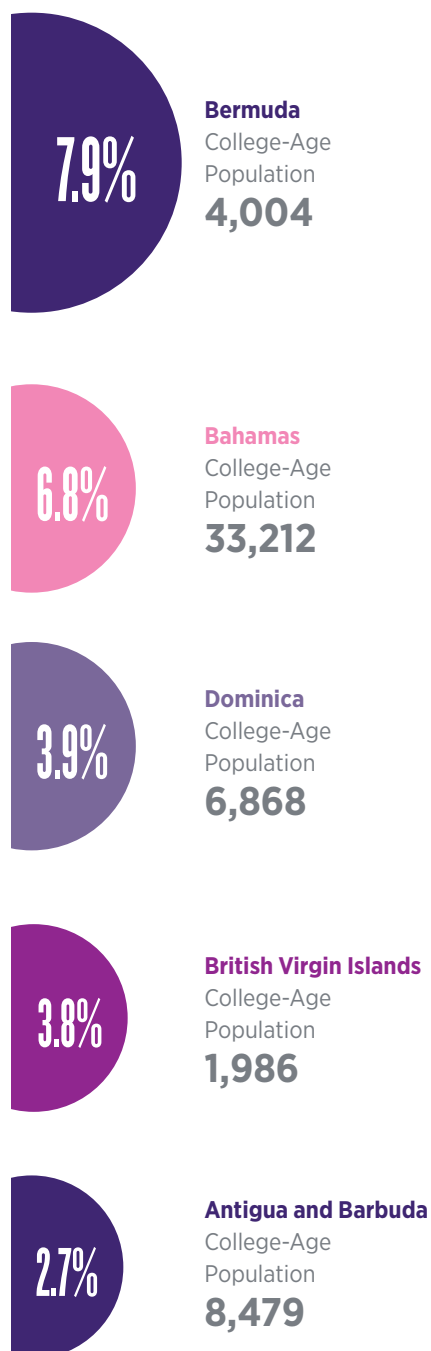
Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students in the Region (Five-Year Trend)

Country	2012/13	2016/17	%Change
Curaçao	4	118	2,850%
Cuba	76	119	56.6%
Paraguay	395	587	48.6%
Venezuela	6,158	8,540	38.7%
Bahamas	1,629	2,252	38.2%

2,850%

Curaçao has the largest percentage growth in the region over the last five years (with over 100 students)

Five Countries of Origin in the Region with Highest Per Capita College-Age Student Mobility to the United States



Source: UNESCO Institute of Statistics; Indicator: 2015 Population of the official age for tertiary education, both sexes

higher education, the modification of the current admissions system, and the creation of a higher education superintendent and regulates the accreditation of all HEIs and tuition.

There are 11 EducationUSA offices in Chile, including a new second office in Santiago inside the BNC. *Becas Chile* scholarships, now administered by the National Commission for Scientific and Technological Research in Chile (CONICYT), have increased the number of students studying in the United States. Since 2008, more than 7,500 scholarships have been awarded at the graduate and doctoral levels to study abroad. In November 2017, *Becas Chile* established water resources, natural disaster resilience, and digital transformation as priority areas for their Master's study abroad scholarship program, with a plan to designate 25 percent of scholarships to applicants in those areas. EducationUSA advisers diligently reach out to university students in Chile so that they will be more likely to consider the United States as the destination for their *Becas Chile* graduate scholarships.

The United States is the number two destination for *Becas Chile* Master's students (after the United Kingdom) and the number three destination for *Becas Chile* doctoral students (after the United Kingdom and Spain). The government of Chile continues to support study abroad through *Becas Chile* (Master's and Ph.D. scholarship program) and English Opens Doors (English pedagogy semester abroad program). In 2017, *Becas Chile* established water resources, natural disaster resilience, and digital transformation as priority areas for their Master's scholarship program.

Colombia. According to UNESCO statistics, the United States continues to be the main destination for Colombian students, followed by Spain and France. Colombia is ranked 22nd in the world for student mobility to the United States (*Open Doors* 2017). The percentages of Colombians pursuing U.S. undergraduate and graduate studies are now fairly equal. STEM fields, business, and law are the most popular fields of study for Colombians who study outside of the country. Colombia is the 11th top sending country of intensive English language

students to the United States.

The number of U.S. study abroad students in Colombia continues to increase. In AY 2015–2016, there were 828 U.S. students studying abroad in Colombia, a 24.7-percent increase from the previous year.

EducationUSA has 11 centers throughout Colombia, making it easier for U.S. universities to recruit students outside of Bogota. Medium-sized cities such as Bucaramanga, Barranquilla, and Cartagena are excellent recruitment destinations, as these cities have quality local schools and are economically prosperous. EducationUSA centers in Bogota at Colfuturo and Fulbright are strategically important, as these two institutions support many Colombian graduate students in the United States.

After the Peace Accord was signed in November 2016, the Colombian government declared education to be a key tool for post-conflict resolution. In this spirit, Colombia has made efforts to improve access to local higher education with programs such as *Ser Pilo Paga* (Being Studious Pays), a government program that provides forgivable student loans on the basis of merit and need to promote enrollment at local universities.

Colombian institutions are advancing rapidly in terms of internationalization and many are ready to enter into broader partnerships. The government of Colombia is working with Colombian universities on a campaign called *Colombia Challenge Your Knowledge* to promote Colombia as a study and research destination (www.challengeyourknowledge.edu.co/index).

Regional Student Totals Top Five Countries of Origin

Country	2016/17	% Change 2015/16
Canada	27,065	0.3%
Mexico	16,835	0.6%
Brazil	13,089	-32.4%
Venezuela	8,540	3.3%
Colombia	7,982	2.1%

Western Hemisphere

php). Policy changes are expected toward the end of 2018, as the new government is formed following the May presidential election.

Cuba. Cuba was the top receiver of U.S. study abroad students in the Caribbean region in AY 2015-2016, with nearly 4,000 students (a 58.6-percent increase from AY 2014-2015), according to *Open Doors*. Cuba continues to represent a hot market for many U.S. HEIs who seek to establish study abroad programs and research exchange opportunities with Cuban universities. The U.S. embassy in Havana hosts an EducationUSA center with one part-time adviser.

The Cuban government is open to institutional partnerships, prioritizing faculty exchanges and generally being more supportive of graduate versus undergraduate student mobility. In AY 2015-2016, the number of Cubans studying at U.S. HEIs increased by 63 percent to 153 but then dropped again in AY 2016-2017 to 119. Top fields of interest for Cuban students pursuing studies in the United States are music, social sciences, and STEM subjects.

As infrastructure in Cuba continues to develop, potential candidates for study in the United States still face challenges related to the application process such as limited internet access, lack of financial tools and mechanisms to complete specific transactions, difficulty in obtaining and mailing official transcripts, and limited testing options. U.S. HEIs interested in recruiting Cubans have demonstrated great flexibility in the process and have creatively accommodated applicants to meet requirements. Institutions committed to recruiting Cuban students also tend to provide full funding, as students rarely have access to personal or external revenue sources to pay for their education in the United States.

Cuba presents institutional partnership opportunities. There are 41 universities in Cuba, including seven major universities in Havana and at least one large university in each province. The U.S. government continues to authorize travel to Cuba for educational activities, though as of March 2018, the government issued a level 3 travel advisory, meaning U.S. citizens should “reconsider travel” to

Cuba. Intending visitors should check the latest advisories and regulations prior to traveling to Cuba.

Guatemala. With approximately 16 million inhabitants, 20 percent of Guatemala’s population is student age. However, only two percent of the population has access to tertiary education, with the highest concentration in Guatemala City. In AY 2016-2017, 1,217 students enrolled in academic programs on U.S. campuses.

Top fields of academic interest for Guatemalan students are engineering, education, architecture, and business at the undergraduate level and business, sciences, and technology at the graduate level. Undergraduate students are interested in athletics, study abroad programs, internships, and experiential learning. Graduate students are focused on professional development, internships, and research options (mainly in STEM).

With modest but positive growth, Guatemala’s economy is stable. Top developing sectors include agriculture, manufacturing, textiles, construction, call centers, tourism, commerce, and finance. Guatemala City is a hub for innovation and entrepreneurship. The private and public sectors support educational initiatives such as GuateFuturo, a private-public alliance that provides forgivable loans and scholarships. One-third of the recipients attend U.S. institutions.

Local universities are looking for international partners to improve their programs, increase student mobility, and serve as a destination for U.S. students. The U.S. embassy strongly supports the *100,000 Strong in the Americas* Innovation Fund. To date, Universidad de San Carlos de Guatemala and Universidad Rafael Landívar have been awarded Innovation Fund grants under the initiative to foster exchanges in the region.

Guatemala currently has two EducationUSA advising centers hosted at Instituto Guatemalteco Americano in Guatemala City and Quetzaltenango. One EducationUSA adviser based in Guatemala City manages both centers. EducationUSA Guatemala collaborates closely with the Guatemala School Counselors Association (GUASCA), to support HEI visits and events in

the country.

Mexico. As reported in the 2017 *Open Doors* report, approximately 17,000 Mexicans chose the United States as their study destination in AY 2016-2017. These students mainly pursued studies in business administration, engineering and STEM, social sciences, physical and life sciences, and fine and applied arts. There is high interest in programs such as AY abroad, summer and winter programs, ESL programs, research opportunities, and internships.

Economic growth has been stable over the past few years, particularly in sectors such as export-oriented automotive and aerospace manufacturing, mining and metallurgy, petroleum extraction, services, and tourism. Along with economic stability, Mexico has prioritized development in STEM innovation and entrepreneurship. Energy has taken on an important role in the national agenda; there is a new priority to allocate more resources, build capacity, and strengthen human capital in this sector, thereby opening a door for training abroad.

Through the implementation of the U.S.-Mexico Bilateral Forum on Higher Education, Research and Innovation (FOBESII), the following milestones have been recorded in support of international education since 2014:

- Approximately 20,000 *Proyecto 100,000* scholarships in support of short-term and language-focused programs have been awarded to Mexican teachers and students
- Nearly 1,000 students have engaged in summer research undergraduate opportunities
- Almost 2,000 students have participated in six-month community college exchanges
- Six EducationUSA U.S.-Mexico Academic Mobility Fairs have taken place, reaching more than 15,000 Mexican students in more than ten Mexican states.

Teacher training is an integral component of the bilateral education agenda, most recently reflected by the new *Mexico en Inglés* initiative focusing on English through teacher colleges (*escuelas normales*), aiming to create 1,000 jobs for qualified teachers.

Mexican HEIs continue to set

internationalization education goals. Many resources are available and events taking place with the objective of building capacity for Mexican institutions to host more U.S. study abroad students. These initiatives include ECA-funded U.S. study abroad capacity-building workshops, ECA-funded International Visitor programs, U.S. associations' international leaders programs, private sector-funded visits of Mexican university presidential delegations to U.S. institutions, public and private cost-share for mobility programs, and the establishment of Mexican state consortia in education hub states such as Jalisco and Puebla. Many public and private institutions allocate resources annually toward meeting the objectives of FOBESII. All of these investments demonstrate the high value that the Mexican government, private sector, and academia place on U.S. education.

EducationUSA Mexico has 25 advising centers covering all regions in the country. In close collaboration with the U.S. embassy and nine U.S. consulates, EducationUSA advisers advance U.S. public diplomacy goals by guiding students through the U.S. admissions process and by preparing them to apply to all relevant U.S. government exchange initiatives.

Peru. According to the latest *Open Doors* report, Peru has had a 9.8-percent increase in undergraduate students studying in the United States and a 0.8-percent increase in graduate students pursuing studies at U.S. institutions, in the past year. The percentage of non-degree students has dropped dramatically (-57.3 percent) because the government ended its scholarship for English as a Second Language (ESL) teachers to receive short-term training in the United States.

Spain is the number one study destination for Peruvian students, followed by the United States and Italy. The Peruvian government continues to implement policies to improve English language levels. *Inglés Puertas al Mundo* is a new government initiative seeking to double the number of hours of English language instruction offered at public high schools nationwide.

Peru has maintained sustainable economic growth during the past couple of years. A strong economy and an increasing

number of parents who recognize the value of studying in the United States are contributing factors to higher undergraduate numbers. EducationUSA has 11 centers across the country, and several medium-sized cities hosting these centers have strong recruitment markets for U.S. higher education. Engineering, business, and law are popular fields of study for Peruvian students.

Although the Peruvian government's scholarship for graduate studies is now for local studies only, Peruvians continue to value an international education. The government is considering the possibility of offering study abroad scholarships to high-achieving, low-income students selected to study at the *Colegios de Alto Rendimiento* (known as COAR schools), elite public high schools across Peru. EducationUSA advises many of these students and prepares them for success at U.S. HEIs through the Opportunity Funds program.

The *100,000 Strong in the Americas*

Innovation Fund 2017 grants for Peru increased interest in internationalization and partnerships with U.S. institutions. EducationUSA supports local universities to develop internationalization strategies and plans.

What to Expect Over the Next Three to Five Years

North and Central America and the Caribbean

- EducationUSA Canada's increased outreach and engagement with local partners, supported by the U.S. embassy and consulates in Canada, aims to expand internationalization strategies in tertiary education. One strategy is the replication of successful U.S. models, including the creation of higher education associations, state consortia, and bi-national initiatives to advance institutional partnerships between Canadian and U.S. HEIs.
- As workforce development continues to be a priority for most Central American

U.S. Study Abroad

Top Five Receiving Countries in the Region

Destination	2015/16	% Change
Costa Rica	9,233	-0.8%
Mexico	5,178	9.9%
Argentina	3,846	3.7%
Cuba	3,781	58.6%
Ecuador	3,751	0.1%

Five Countries (with over 100 students) with Highest Percentage Growth, U.S. Students in the Region (Five-Year Trend)

Country Name	2011/12	2015/16	% Change
Colombia	294	828	181.6%
Cuba	1,454	3,781	160.0%
Panama	730	1,256	72.1%
British Virgin Islands	104	159	52.9%
Haiti	454	689	51.8%

Western Hemisphere

countries, interest in short-term certificate programs and partnerships between local technical universities and U.S. community colleges continues to grow. The objective is to provide vocational education to workers in emerging industries such as renewable energy, tourism, and mining as well as traditional economic sectors such as agriculture, manufacturing, and services.

- The governments of Mexico and the United States continue to support academic exchanges focusing resources on short-term preparation, research opportunities, and internship-based programs. Under the framework of FOBESII, priority is given to minorities and underrepresented populations for support of new program initiatives as well as STEM fields, with a focus in energy, language acquisition, and training.
- Public-private partnerships in Mexico and Central America continue to be popular models for supporting and sustaining regional academic exchange initiatives. Mexico is the leading participating country in the *100,000 Strong in the Americas* Innovation Fund initiative and its institutions, including local government and the private sector. They seek innovative ways to enable exchanges and increase the spectrum of opportunities available for Mexican and U.S. students. In Panama, academia, local government, and the private sector support the *Knowledge in Panama* initiative, which aims to position Panama as the premier study and research destination in the region. In El Salvador, the U.S. embassy has established the *100,000 Strong Scholarship Fund* to increase resources for exchanges, public awareness of cost-effective options for overseas study, and the strengthening of Salvadoran educational institutions. The fund complements the goals of El Salvador's *Partnership for Growth* by investing in human capital and building long-term institutional strength in education. In Costa Rica, increased efforts to develop a qualified workforce to meet the demands of multinational companies in-country are creating new opportunities for collaboration between non-governmental organizations, the private sector, and academia in support of non-traditional exchanges and

virtual education.

- In June 2017, the U.S. government launched *Caribbean 2020*, a U.S. interagency strategy for engagement in the Caribbean. This strategy includes education as one of six priority areas, focusing on support for public-private partnerships that facilitate higher education and workforce development in the United States and the Caribbean as well as the efforts of U.S. colleges and universities to recruit qualified students from the region; deployment of U.S. academic experts to the region to develop early literacy curricula; and provision of technical assistance for education policy training to teachers, policymakers, and civil society.

South America: Andean Region

- Political and economic changes in the region are driving student mobility. All governments continue to prioritize educational opportunities for their citizens; however, the focus for the next few years will be on strengthening local institutions. It is therefore a great environment for U.S. institutions to seek partnerships with local universities.
- Peru is implementing a new law focused on improving the quality of HEIs. Institutions will look for international partnerships to achieve related goals. The local economy is set to continue to prosper over the near term. Though the current government scholarship program is focused on local study opportunities, Peruvians will continue to have a strong interest in studying abroad, and the United States will continue to grow in popularity. Political changes could continue to influence small shifts in the national education agenda, but all political parties identify higher education as a strategic investment for the country.
- Bolivia has maintained healthy economic growth, and EducationUSA advisers and the U.S. embassy in La Paz have implemented strong initiatives promoting U.S. study throughout the country. Advisers have seen increased interest across all academic levels in U.S. study, a trend that will continue over the next couple of years. Limited local higher education opportunities in Bolivia drive students to look for opportunities abroad.
- Ecuador is in the middle of an economic

recession, which will likely decrease student mobility over the next few years. Ecuadorians will continue to be interested in studying abroad though they will look for more affordable options. Several Asian and European countries have become popular destinations as foreign governments offer generous scholarships to Ecuadorians. The recent decrease of first-time U.S. undergraduate enrollment is partially because it has become more difficult for students to access government-funded student loans. The higher education law in Ecuador dictates that universities must implement internationalization initiatives, which means that in the next few years there will be many opportunities to engage with Ecuador through institutional partnerships focused on student mobility and research.

- As Colombia enters a period of greater stability following the peace agreement, the government will continue to invest in education, especially at the university level, pushing for more internationalization opportunities. Though the country's economy is doing well, the continued devaluation of the peso may have an impact on the number of students choosing to study in the United States. The new government, following the 2018 presidential election, may implement new higher education initiatives.
- The next three to five years seem likely to continue to be challenging for Venezuela. The current economic and political environment will continue to drive Venezuelans to send their children to study abroad. However, the number of Venezuelans studying in the United States will likely decrease as it is more affordable for Venezuelans to migrate to nearby countries in the region.

South America: Southern Cone

- For Brazil, political uncertainty in the country led to a hold on all federal educational funds for almost one year. The government has just announced that funds will be given directly to Brazilian HEIs, which will select international HEI partners. U.S. institutions of higher education can expect to receive more Brazilian students through already-established partnerships with Brazilian HEIs for the next two years. There will be a new administration in 2019 with predicted continued economic growth

and educational reform in 2018.

- Argentina is now the leading receiving country in South America for U.S. students as a result of the proactive efforts of the government and HEIs. Many Argentine universities have expressed interest in forming partnerships with U.S. universities to teach Spanish and Latin American Studies courses to visiting U.S. students. The current cabinet will remain in government for the next three years, and most of its members studied in the United States. The South America Fair is a great opportunity to recruit Argentine students, capitalizing on several new government scholarships.
- Chile is in the final stages of an educational reform, with the goal of offering free university education to all students. Aspects of the reform that have already passed into law include a gradual increase of free access to university and postsecondary education for the most vulnerable students and the creation of 15 public postsecondary vocational training centers. There is an anticipated increase in undergraduate students going to the United States, even though Chile has historically sent more graduate students.
- The Ministry of Education in Paraguay reached out to the U.S. embassy and the Regional Educational Advising Coordinator (REAC) for support to expand the number of trainers for graduate testing in the country so that more students could apply for graduate admissions at U.S. HEIs. Educational Testing Service (ETS) offered a *Propell* train the trainers workshop for major universities and testing centers in the country on how to prepare students for the GRE. More students will be coming to the United States next year under the government's graduate scholarship program.
- The government of Uruguay has incorporated English and technology into the public curriculum at all levels. With government organizations created in the past ten years, such as the National Agency for Innovation and Research (ANII) and Plan Ceibal (the organization championing Uruguay's national one-laptop-per-child initiative), the government of Uruguay is focused heavily on promoting 21st century

tools, such as English language skills, innovation, and technology. The REAC and the U.S. embassy in Uruguay are investing in capacity-building workshops for Uruguayan universities that will attend international conferences this year. AACSB is offering workshops to Uruguayan and U.S. HEIs to help them build partnerships for student mobility. Uruguayan universities are looking to expand their connections to U.S. universities, especially in fields of entrepreneurship and law. Universities are interested in increasing study exchanges, dual credit courses, and joint degree programs.

Virtual and Social Media Usage

EducationUSA advisers employ social media platforms such as Facebook, YouTube, Instagram, Twitter, and blogs. Advisers use the WhatsApp messaging application to disseminate information about upcoming events and as a tool for cohort advising. Advisers also use Skype for virtual advising and virtual office hours. Facebook event ads and Facebook Live are effective outreach tools in the region. All of these platforms are available for universities to promote their programs and are an effective method to engage with local audiences. The following examples highlight virtual initiatives in the WHA region.

- EducationUSA Colombia's virtual adviser, ED, is available 24 hours a day for consultations. ED also has a mobile application through which students begin to plan their studies using the EducationUSA *Your 5 Steps to U.S. Study* model. Interested U.S. institutions can follow ED on social media and share content.
- EducationUSA Mexico continues to implement its series of webinars and Facebook Live events, highlighting specific parts of the application process. Recorded webinars and podcasts on YouTube channels have exponentially increased the views of EducationUSA-produced content.
- EducationUSA Canada continues to rely on technology to reach students. During summer 2017, Canada hosted its first virtual essay writing boot camp of four sessions with the objective of helping participants finish their personal statements for submission with college

applications in the fall.

- EducationUSA Brazil has developed an online cohort advising program that is being reproduced in several cities to support virtual discussions. In addition, advisers have developed and implemented a cohort outreach program under which they return to a school or university three times to meet with a small cohort of students. During a series of three cohort sessions, the advisers explain how to: 1) choose a university, 2) fill out the Common Application, and 3) search for financial aid.
- EducationUSA Bolivia is focusing on outreach and advising through social media to reach a larger audience. EducationUSA has partnered for a second year with the U.S. embassy in La Paz to conduct a nationwide social media campaign promoting EducationUSA services and study in the United States.
- Venezuelans rely heavily on social media for information from U.S. universities. Internet connectivity issues and local power outages make virtual activities challenging. EducationUSA centers host viewing parties in the early afternoon to help local students view webinars at times when connectivity is more stable.

Successful Recruiting Strategies

- Interact with students through EducationUSA webinars and in-person presentations at advising centers.
- Use alumni to recruit students, but do not underestimate the value of sending representatives to build trust and name recognition. Consult EducationUSA when sending alumni to represent your institution.
- Connect current students on campus with potential students from the same country to share their experiences (via mobile videos, Skype, webinars, etc.).
- If visiting a major city, consider joining other universities recruiting in the country. High-traffic EducationUSA centers prefer to welcome small groups of universities instead of juggling many individual visits simultaneously.
- Reach out to EducationUSA advisers from off-the-beaten-track locations. Many of these are untapped resources of numerous students interested

Western Hemisphere



in studying in the United States. EducationUSA REACs and advisers can help identify these locations.

- Distribute materials in local languages: Spanish, Portuguese, English, French, and Dutch.
- Highlight anecdotes of institutional support, programs, and services that might be of interest to students from the region, especially related to culture, history, politics, sports, food, and the arts.
- Request an HEI login to the EducationUSA website and find out about conferences in the region that can be integral to student recruitment and the establishment of partnerships.
- Use local-language websites to attract students from government scholarship programs.
- International schools have often been the focus of recruitment efforts, but U.S. universities have recently begun to recruit qualified students from prominent national schools as well.
- Stay informed about faculty-led study abroad programs at your institution. Ask professors and students to stop by EducationUSA advising centers to meet local students and share experiences of being a student at your institution.
- Become familiar with existing institutional agreements between U.S. institutions and those of the countries of interest for recruiting.
- Be aware that short-term programs motivate students to return for full-degree programs.
- Send U.S. interns to EducationUSA advising offices to help advisers with local projects.
- Explore institution-wide partnerships that go beyond recruiting students. Institutions in several countries in the region have internationalization goals and mandates, and many are ready to enter into broader partnerships, such as faculty exchanges, research or internship programs, and group study abroad for both inbound and outbound students.
- Stay abreast of regional EducationUSA events. Check the EducationUSA website and country Facebook pages to find current region- and country-specific information about upcoming fairs, webinars, and other events and activities. Contact the appropriate REAC for specific activity information, such as beginner adviser trainings, thematic sub-regional workshops, and capacity-building workshops for local HEIs.

Foreign Government and Private Funding

- **Argentina.** In 2017, the Ministry of Education's Department of International Scholarships and International Cooperation (DGCIN) funded 1,000 scholarships to the United States, including 50 Master's degree students and Ph.D. candidates, 100 research grants, 300 Friends of Fulbright participants, and 400 teachers and principals for short-term courses. Fifteen U.S. HEIs are now hosting Friends of Fulbright students, and EducationUSA organizes pre-departure orientations for these students. The government also funds BEC.AR, 30 scholarships for Master's program and research grants

in STEM fields. The City of Buenos Aires Magistrates' Council awards five LLM scholarships through Fulbright. The National Funds for the Arts in Argentina created five scholarships for outstanding artists on short-term programs, and the National Scientific and Technical Research Council (CONICET) funds postdoctoral research grants (www.argentina.gob.ar/becar/en).

- **Antigua and Barbuda.** Antigua and Barbuda offer a government-funded grant of approximately USD\$5,000 annually as well as low-interest loans to students pursuing tertiary-level studies, including online study at the undergraduate and graduate levels.
- **The Bahamas.** The Lyford Cay Foundation scholarships are generally worth as much as USD\$15,000 per AY. In addition, the Ministry of Education of the Bahamas has implemented a tiered system to award grants and merit scholarships ranging from USD\$7,500 to USD\$35,000 for study abroad.
- **Barbados.** The *Barbados Scholarships and Exhibitions* are merit-based undergraduate scholarships awarded to approximately 30 students with very high scores on the Caribbean Advanced Proficiency Examinations (CAPE) or in an Associate's degree program at the Barbados Community College. The scholarship pays for tuition, airfare, and a small stipend of about USD\$3,500 per year for study at home or abroad. In addition, the *National Development Scholarships* provide approximately ten scholarships each year in various disciplines to people between the ages of 18 and 40 who have already been accepted at an internationally accredited university at the undergraduate or postgraduate level.
- **Bolivia.** In 2014, the Bolivian government launched a scholarship program called *Soberanía* for pursuing graduate studies at top international universities. In 2018, the government added eligible fields of study for this scholarship, in addition to STEM fields, including medicine and law. The scholarship covers all costs, including, in some cases, local costs of language preparation. One challenge is that the scholarship award dates are not synced with the deadlines for accepting admissions offers from U.S. universities.

The Ministry of Education is looking for partnerships with HEIs to implement the scholarship more effectively (www.minedu.gob.bo/index.php/programa-100-becas).

- **Brazil.** Although the Brazilian government has discontinued the federal scholarship program known as the *Brazil Scientific Mobility Program*, the government has launched the *International CAPES Print Programme*. This initiative provides approximately USD\$100 million for the next four years for higher education and research institutions to fund scholarships abroad for one-year doctoral research programs, senior visiting professors, and short-term professional development programs. Funding will also include short-term scholarships for programs in Brazil targeted at international visiting scholars, young talent, and postdoctoral professionals with experience abroad. U.S. HEIs should look to their Brazilian university partners or establish partnerships, as Brazilian universities are the ones to submit and receive the grants from the Brazilian government (www.capes.gov.br/cooperacao-internacional/multinacional/programa-institucional-de-internacionalizacao-capes-print). The Fulbright Commission in Brazil is working with CAPES to expand Fulbright's professional development support for public school teachers and has sent more than 1,000 teachers to U.S. HEIs for one-month teacher training programs.
- **Canada.** The *Killam Fellowships Program* administered by the Fulbright Commission provides an opportunity for exceptional undergraduate students from universities in Canada to spend one semester or a full academic year as an exchange student in the United States. This program provides a cash award of USD\$5,000 per semester (USD\$10,000 for the full AY).
- **Chile.** *Becas Chile* is a government scholarship now administered by CONICYT. Since 2008, more than 7,500 scholarships have been awarded to Chilean students and residents at the graduate and doctoral levels to study abroad. In 2017, approximately 18 percent of awardees pursued their studies in the United States. *Becas Chile* recently established water resources, natural disaster resilience, and digital transformation as priority areas for

their Master's scholarship program. Other Chilean government scholarships include *English Open Doors*, which funds a semester abroad for students pursuing degrees in English pedagogy, and *Becas Para Tecnicos*, a program for technicians specializing in the field of mining to study abroad for as long as 12 months (www.becaschile.cl/).

- **Colombia.** The foundation COLFUTURO (www.colfuturo.org) offers scholarship-loan opportunities to qualified Colombian graduate students to study abroad. COLFUTURO also administers the COLCIENCIAS program, which provides funding for doctoral degrees abroad in science, technology, and engineering fields. *Passport to Science*, one of the components of a larger Colombian government initiative called *Colombia Cientifica* (colombiacientifica.gov.co/colombia/en/) has scholarship-loan opportunities for Colombians to study at the Master's and Doctorate levels abroad in critical fields: health; agriculture and food safety; energy, mines, and sustainable development; environment, biodiversity, and biotechnology; engineering and materials; and social sciences for post-conflict. The Colombian institution ICETEX (www.icetex.gov.co) provides educational loans for undergraduate and graduate study within Colombia and graduate study abroad. The Fulbright Commission in Colombia has several local partnerships that have increased the number of Fulbright grants available for graduate studies in the United States.
- **Costa Rica.** The Costa Rica-USA Foundation (CRUSA), with World Bank and local HEI collaboration, supports international exchange and student mobility initiatives, mainly at the graduate level in STEM fields, including the Opportunity Funds program. In 2017, CRUSA launched a pilot program in partnership with the BNC Centro Cultural Costarricense Norteamericano and its EducationUSA center to support technical and vocational education through community colleges. This five-year initiative will support 33 Costa Ricans, awarding USD\$40,000 on average, per student, for a two-year period (www.crusa.cr/programa-becas-tecnicos-especializados/).
- **Dominica.** The Dominica government awards one *Island Scholarship* each

year to the student who has earned the highest score on CAPE. In addition, the Dominica government awards approximately five scholarships annually to the best student in each of the five faculties of the Dominica State College.

- **The Dominican Republic.** The Ministry of Higher Education, Science, and Technology (MESCYT) continues to support study abroad at graduate education levels, with seven percent of all applicants choosing the United States as their study destination. Priority fields for MESCYT are Master's and Doctorate degrees in the following areas: engineering, basic sciences, public health, education, agriculture, food, and animal sciences. The ministry seeks to develop partnerships to establish articulation agreements with U.S. research-focused universities that offer in-state tuition for scholars from the Dominican Republic (mescyt.gob.do/index.php/programa-de-becas/becas-internacionales). INICIA EDUCACIÓN provides scholarships to Dominican educators, administrators, and professionals for Master's degrees in education-related fields at top-ranked programs (www.iniciaeducacion.org).
- **Ecuador.** The National Secretariat of Higher Education, Science, and Technology (SENESCYT) (programasbecas.educacionsuperior.gob.ec/) continues to provide study abroad opportunities for both graduate and undergraduate studies, though scholarship opportunities have been reduced. *Convocatoria Abierta 2017* and *Universidades de Excelencia*, the two main scholarship programs for graduate studies are on hold, indefinitely. These programs have lists of eligible international universities, including a small number of U.S. institutions, though the revised lists give priority to Asia and Europe. *Grupo de Alto Rendimiento* is a program available for a small selection of economically disadvantaged public school students to pursue undergraduate studies in Ecuador or abroad.
- **Guatemala.** *GuateFuturo* offers loans of as much as USD\$50,000 for Master's programs. Students may be awarded scholarships for 50 percent of the loaned amount provided they comply with three requirements: 1) be awarded their postgraduate degree, 2) return to

Western Hemisphere

Guatemala, and 3) remain in the country for three to five years. Students can also obtain an additional 10-percent discount if, upon returning to the country, they engage in employment for one year in the public sector or as teachers or researchers in public or private institutions. Those pursuing Master's degrees in management or Master of Business Administration (MBA) programs are awarded only 25 percent of the loan amount as a scholarship.

- **Honduras.** The government of Honduras' *Becas Honduras 20/20* funds graduate studies abroad through the International Graduate Scholarships Program initiative (becashonduras2020.gob.hn). In 2017, approximately 120 Honduran students received awards to cover airfare, lodging and maintenance, tuition and fees, medical insurance, and materials. Priority fields of study for this program are agriculture, environmental sciences, engineering, economics, business administration, and health sciences (medicine, pharmacy, dentistry, and biology). HONDUFUTURO offers loans of as much as USD\$50,000. Students may be awarded scholarships for 50 percent of the loan amount, provided they meet three requirements: 1) be awarded their postgraduate degree, 2) return to Honduras, and 3) remain and work in the country for three to five years. Students can obtain an additional ten percent discount if, upon returning to the country, they engage in employment for one consecutive year as teachers in local universities. Those pursuing Master's degrees in management or MBA programs are awarded only 25 percent of the loan amount as a scholarship.
- **Mexico.** The government of Mexico's *Proyecto 100,000* initiative continues to support programs focused on short-term exchanges, research, language acquisition, and teacher training. The U.S. embassy in Mexico, with support from local higher education associations and in partnership with HEIs, has been offering a series of short-term programs focused on women and minority empowerment as well as workforce development. The Fulbright Commission in Mexico, COMEXUS, supports non-Fulbright innovative short-term programs in support of undergraduate research, teacher training, and professional internships, both in Mexico and the United States (in addition

to managing the traditional Fulbright exchanges). The government sends graduate students mainly via the Fulbright Commission and the National Council of Science and Technology.

- **Panama.** The Panamanian government announced its *Panama Bilingue* initiative in 2014 with the goal of supporting 10,000 English language teachers in teacher training programs in an effort to increase the quality of English instruction in public schools by 2019. To date, approximately 3,000 Panamanian English teachers have traveled abroad to participate in two- to four-month programs, and another 3,000 have benefitted from similar programs locally in Panama. The Panamanian government expects 1,000 more teachers to travel during 2018 (panamabilingue.com). The National Secretariat of Science Technology and Innovation (SENACYT) administers several scholarship programs at the undergraduate and graduate levels in a wide range of fields, including a Fulbright-SENACYT scholarship. IFARHU, a Panamanian government institution designed to develop human capital through education, offers loans of as much as USD\$80,000 to support completion of undergraduate and graduate programs abroad as well as scholarships to complete short-term, intensive language training and undergraduate and graduate degrees (www.ifarhu.gob.pa).
- **Paraguay.** In 2015, the Paraguayan government launched its first scholarship program, *Becas Don Carlos Antonio Lopez* (www.becal.gov.py). This program funds as many as 1,500 scholarships for Master's and Doctorate degrees in education and STEM fields for students accepted to the top 300 world universities or top 100 higher education programs, according to three university rankings. In addition to the government scholarships, the U.S. embassy in Paraguay administers the Fulbright program with Master's scholarships and other exchange programs.
- **Peru.** PRONABEC is Peru's government agency for scholarship programs and manages *Beca Presidente de la República*. The scholarship covers Master's and Doctorate studies in STEM, public policy, and education. Recently, the focus of this scholarship has been redirected to fund studies only in Peru (www.pronabec.gob.pe/2018_becas_pronabec.php). *Programa*

Crédito-Beca Reto Excelencia-SERVIR (www.retoexcelencia.gob.pe/) is a loan-scholarship program for public servants to pursue graduate studies abroad.

- **Uruguay.** The government of Uruguay helps to identify or nominate candidates for U.S. embassy exchange programs, and in recent years, has become a strong contributor to Fulbright academic programs. Every year, ANII funds Fulbright scholarships to U.S. institutions to earn Master's degrees or Ph.D.s in subjects such as biotechnology, health, energy, agro-industry and food chain development, natural resources, and information and communication technologies (www.fulbright.org.uy/becas-para-uruguayos/beca-de-posgrado/).
- **Organization of American States (OAS).** Students from member countries are eligible for *Rowe Fund* loans (www.oas.org/en/rowefund/). These interest-free loans are available at the graduate level throughout the region and for undergraduate studies for English-speaking Caribbean countries. The *Rowe Fund* offers EducationUSA Opportunity Funds students from Argentina, Barbados, Bolivia, Chile, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, Paraguay, Uruguay, and Venezuela the opportunity to apply for this loan without the need for a cosigner.

Regional EducationUSA Events

Rely on the EducationUSA website and country Facebook pages to find current country-specific information about upcoming fairs, webinars, center events, and other activities and events. Contact the appropriate REAC for the area in which you are interested in participating, such as beginner adviser trainings, thematic sub-regional workshops, and capacity building workshops for local HEIs.

Fairs and Conferences

- **Brazil.** EducationUSA organizes the Brazil Roadshow to seven cities every spring, immediately before or after Brazil's premiere international education conference FAUBAI. This tour is a great opportunity to recruit students and meet key leaders in internationalization and to establish partnerships. In 2017, the Roadshow reached more than 8,500 students.
- **Canada.** EducationUSA Canada

organizes a monthly webinar series highlighting the application process and opportunities in the United States.

- **Caribbean.** Aside from traditional independently organized Caribbean college fairs, EducationUSA Antigua, Bahamas, Barbados, Dominica, Jamaica, Nevis, and Trinidad and Tobago host fairs. The next Caribbean fair circuit will take place in October 2018.

- **Colombia STEM Tour.** In March 2018, EducationUSA Colombia organized the second annual EducationUSA STEM Tour. With stops in five cities, the tour promotes both graduate and undergraduate programs in STEM. In addition to participating in a fair in each of the cities, representatives visit local high schools and universities and take part in cultural events. For more information, please contact colombiatour@educationusa.org.

- **Costa Rica.** EducationUSA Costa Rica hosts its annual EducationUSA camp supported by the U.S. embassy. The program trains students on essay writing, provides testing practice, and teaches them how to search for colleges that fit their needs.

- **Ecuador.** The EducationUSA center in Cuenca organizes a fair for U.S. higher education representatives recruiting in the region and U.S. universities with study abroad programs in Ecuador every January. The goal is to promote U.S. studies in the southern part of Ecuador, collaborating with study abroad initiatives in Ecuador.

- **High School Counselor Training**

Workshops. EducationUSA Canada, Chile, Colombia, Ecuador, Honduras, and Mexico organize training workshops on U.S. higher education for high school counselors.

- **LLM Fair.** In 2017, EducationUSA had its first South America LLM Fair circuit to seven cities and five countries: Rio, Brasilia, Sao Paulo, Buenos Aires, Santiago, Lima, and Bogota. The inaugural event included 42 U.S. HEIs and attracted approximately 1,500 visitors. The fall 2018 second annual LLM fair will expand to additional countries.

- **Community College Fair Circuit.** In November 2018, EducationUSA will be piloting a Community College Fair Circuit in five cities in South America during International Education Week.

- **Mexico.** EducationUSA and COMEXUS will continue to host the U.S.-Mexico Academic Mobility Fair in October 2018 to five cities: Guadalajara, Monterrey, Merida, Queretaro, and Mexico City. These multi-city circuits attract approximately 4,000 students each year. In fall 2018, Guatemala City will be joining the circuit as the sixth stop on the tour.

- **South America.** The 2017 South America EducationUSA fair circuit attracted 97 colleges and universities traveling through 12 cities, with more than 35,000 students in attendance. The 2018 South America EducationUSA Tour will take place August 27–September 20. (educationusafair.org/university).

- **Venezuela.** EducationUSA Venezuela offers EducationUSA Mock Fairs in all four centers across the country. As political and economic conditions have made it

difficult for U.S. university recruiters to visit the country, EducationUSA has come up with this creative way to educate the public about U.S. higher education while giving their English language students a challenging and engaging project. EducationUSA advisers train English students from local BNCs how to research and represent U.S. colleges or universities at these fairs for which U.S. institutions are encouraged to send materials.

U.S. Study Abroad

Costa Rica continues to be the region's top receiving country with 9,233 U.S. students in 2016 (a 3.8-percent increase from 2015), making it the ninth most popular study abroad destination worldwide for U.S. students. Mexico, Argentina, Ecuador, Peru, and Brazil are also leading host destinations in the region, ranked globally 12th, 16th, 19th, 22nd, and 24th, respectively. Other rapidly growing destinations for Americans studying abroad include Colombia and Paraguay in South America; Honduras, Nicaragua, and Panama in Central America; Canada in North America; and the Bahamas, Cuba, and Haiti in the Caribbean.

In 2018, the U.S. embassy in Quito, Fulbright Ecuador, and EducationUSA are organizing a series of capacity-building workshops through the newly developed network of Ecuadorian universities, *Red Ecuatoriana para la Internacionalización de la Educación Superior* (REIES), as local universities are looking for resources to help their internationalization efforts.

Increased mobility from the United States to the Caribbean (22.9 percent) is the result of faculty-led programs and established exchanges, many focusing on health-related fields as well as gender and social issues. The leading receiving countries include the Bahamas, Cuba, Haiti, Jamaica, and Trinidad and Tobago.

In 2017, U.S. embassies and Fulbright Commissions in Argentina, Canada, Colombia, Ecuador, El Salvador, Guyana, Honduras, and Nicaragua received grants from the USA Study Abroad Branch at the U.S. Department of State to carry out capacity-building projects to promote U.S. study abroad in the region. EducationUSA centers have collaborated with local universities, embassies, and Fulbright Commissions to support these initiatives.

Best and Worst Times of the Year to Interact with Students (Face to Face and Virtually)

The academic calendar in WHA varies greatly. In Northern Hemisphere countries, the academic year runs from August, September, or October to May, June, or July. In Southern Hemisphere countries, the school year aligns more closely with the calendar year, running from February or March to November or December. However, a few countries have varied academic years, based on the region. Avoid traveling during Christmas, New Year, and region-specific festivities such as Carnival, Holy Week, and All Saints Day/Day of the Dead. Specifically, the recommended times to visit Canada are fall and spring, and the best time to recruit in Guatemala is the spring. Check with REACs before planning a trip to avoid visiting during local holidays.



2018 GLOBAL GUIDE



Your Official Source on U.S. Higher Education

EducationUSA.state.gov

