



Global Guide 2019



2019 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 2018 *Open Doors* Report on International Educational Exchange, produced by IIE and sponsored by the U.S. Department of State.

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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 <https://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 <https://studyabroad.state.gov>.



5.6 million+

Social Media "likes"

10,500+

Subscribers to the Higher
Education eNewsletter

6.2 million+

2018 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 \$45.3 billion to the U.S. economy in 2018 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.

Despite the benefits that international students bring to their campuses, in academic year (AY) 2017-2018, nearly 80 percent of international students studied at only 300 colleges and universities. With the goal of promoting the diversity of U.S. higher education to help international students find their best fit, EducationUSA advocates for study at all the 4,700+ accredited U.S. HEIs and supports HEIs who are working to increase their capacity to host international students.

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 <https://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 could 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 <https://educationusa.state.gov>.
- Conduct market research to identify audiences of prospective students in regions or countries that fit your

institution's recruitment priorities. As of 2019, this guide, along with the *Student Mobility Facts and Figures* sheets for more than 175 locations worldwide are accessible on the public-facing pages of the EducationUSA website. Also take advantage of the *Open Doors Report* on international educational exchange, and the EducationUSA center information available on the website.

- Attend the new monthly EducationUSA HEI interactive webinar series. Hosted from Washington, DC this series is designed to enhance HEIs' capacity to recruit and host international students from specific geographic regions, as well as explore select themes. For each geographically-focused webinar, REACs, select advisers, and the regional Program Officer from the designated region provide the latest information on recruiting trends, tips, strategies, scholarships, and foreign government and related engagement opportunities. The other six webinars examine themes of general interest and importance to HEIs, such as student visas, recruiting at and interacting with foreign high schools, leveraging EducationUSA resources, and best practices in communications and social media in recruiting international students.
- 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 approximately 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 student mobility fact sheets, 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 <https://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	104,922
Advising by phone or SMS (each conversation)	214,549
Advising by email	391,850
Group advising attendees	172,153
Walk-ins/library/computer users	433,921
U.S. institution representatives	7,122
MOOC Camp Attendees	14,190

Total 1,338,707

Number of Event Attendees, by Outreach Activity

Education fairs	633,964
American Corners/Centers	137,592
Local universities/secondary schools	465,919
Other fairs/conferences/seminars	120,750
Host government events	20,923
Embassy/consulate events	35,463
Public locations	18,719
Other activities	37,462

Total 1,470,792

Number of Virtual/Social Media Contacts, by Type

Social networks - page likes	5,623,249
Instagram followers	129,351
Videos/ video channels views	3,552,223
Skype contacts & IM advising calls	84,902
Blog followers	117,504
Twitter/microblog followers	939,965
Digital Video Conference (DVC) participants	713
EducationUSA webinar participants	21,056
EducationUSA Interactive Session views	84,800
Virtual fairs - EdUSA booth & session visitors	11,521

Total 10,565,284

Unique website visitors (Center and flagship websites)

Total 6,252,534

Grand Total 19,627,317

**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 <https://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 <https://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 <https://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 <https://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. Instagram and LinkedIn have also become increasingly popular social platforms for EducationUSA. The flagship EducationUSA Facebook page reached more than 356,000 "Likes" in 2018, while the flagship Twitter account had approximately 23,000 followers. The EducationUSA Instagram account was relaunched in 2019 and has been growing briskly with approximately 12,400 followers. The EducationUSA LinkedIn account had nearly 3,000 followers at the end of 2018. 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 six studio-produced Facebook Live 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. Additional topics have included student athlete recruitment, supporting students with disabilities, Muslim student experiences, LGBTIQ campus communities, exploring community colleges, and a session on U.S. campus culture conducted in Spanish. The Interactives attract viewers from around the world who are able to pose questions and get answers in real-time. EducationUSA records the Interactives and later uploads them to YouTube where they can continue to be viewed in their entirety.

EducationUSA Virtual Fairs

EducationUSA continues to partner with CollegeWeekLive (CWL) on a virtual international student college fair during International Education Week. Four CWL events were hosted in 2018, which in total attracted 13,670 attendees. Students from approximately 150 countries and territories interacted with EducationUSA advisers and U.S. HEI representatives, resulting in almost 33,000 total connections with U.S. institutions. During each virtual fair, EducationUSA advisers present thematic sessions related to U.S. study, while representatives from the State Department's Bureau of Consular Affairs and Department of Homeland Security's Student Exchange Visitor Program present

on student visas and what to expect on arrival in the United States. Meanwhile, teams of advisers answer student questions for the duration of the 12-hour event, providing a service to students who might not otherwise be able to interact with an EducationUSA advising center.

EducationUSA Website

EducationUSA's mobile-friendly website, <https://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. 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 provides resources for the U.S. higher education community and foreign institution and government users. Higher education professionals can request a login to access REAC contact information, and submit scholarship opportunities for posting to the site. Student Mobility Facts and Figures sheets for more than 175 locations worldwide, previously only available with the login, are now public-facing.



Facebook
Likes: 5.6 million+
Pages: 214



Twitter
Followers: 939,000+



Instagram
Followers: 129,000+

EducationUSA Regional Reach

Contacts Made in 2018 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	307,407	120,695	172,513	82,948	295,834	359,310
Advising center-based contacts	306,849	118,552	171,696	82,319	294,800	357,369
U.S. institution representative contacts	558	2,143	817	629	1,034	1,941
Total contacts made through outreach activities	308,432	273,868	248,692	107,241	247,527	285,032
Education fairs	84,169	101,088	163,265	57,373	88,218	139,851
American Corners/Centers	60,282	20,356	15,685	5,753	27,989	7,527
Local universities/secondary schools	139,470	89,910	38,125	22,116	97,520	78,778
Other fairs/conferences/seminars	12,523	50,432	10,018	8,899	13,906	24,972
Host government events	1,666	3,247	631	7,993	1,497	5,889
Embassy/consulate events	2,486	2,330	17,215	1,881	6,331	5,220
Public locations	2,311	5,689	1,860	1,655	2,357	4,847
Other activities	5,525	816	1,893	1,571	9,709	17,948
Total contacts made through virtual platforms	2,597,167	2,147,014	1,050,624	702,334	1,870,588	942,164
Social media platforms	2,595,043	2,146,438	1,050,624	701,081	1,868,599	930,576
Webinars, DVCs	2,124	576	4,239	1,253	1,989	11,588
GRAND TOTAL	3,213,006	2,541,577	1,471,829	892,523	2,413,949	1,586,506

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



In the 2017-2018 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 5th among service exports in 2018. International students studying in the United States contributed over \$45.3 billion* to the U.S. economy in tuition and living expenses during the 2018 calendar year, for a trade surplus of \$36.4 billion.

The U.S. Commercial Service is the trade promotion arm of the U.S. Department of Commerce's International Trade Administration (ITA). ITA's mission is to create prosperity by strengthening the international competitiveness of U.S. industry, promoting trade and investment, and ensuring fair trade and compliance with trade laws and agreements. The U.S. Commercial Service has 1,330 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 more than 175 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, Eswatini (formerly Swaziland), Ethiopia, Gabon, The Gambia, Ghana, Guinea, Guinea-Bissau, Kenya, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mauritius, Mozambique, Namibia, Niger, Nigeria, Reunion, Rwanda, St. Helen, Sao Tome & Principe, Senegal, Seychelles, Sierra Leone, Somalia, South Africa, South Sudan, Sudan, Tanzania, Togo, Uganda, Zambia, Zimbabwe

51

EducationUSA Advising Centers in the Region

35 Comprehensive
13 Standard
3 Reference

From the islands of Cabo Verde to the island of Madagascar and the huge, diverse continent in between, Sub-Saharan African students represent a diverse group of motivated and talented potential international students. Sub-Saharan Africa has a growing population of 1.06 billion people with 20 percent of the population between the ages of 15–24. The Population Reference Bureau projects the African population will more than double to 2.6 billion by 2050 and account for 58 percent of the global population increase during that time.

EducationUSA serves Sub-Saharan Africa with 51 EducationUSA advising centers—35 comprehensive, 13 standard, and three reference, with 57 EducationUSA advisers throughout the region. Advisers based in standard and reference centers at U.S. missions have responsibilities for other Public Affairs programs such as local cultural affairs programs, education exchange programs such as Fulbright and Humphrey, English language programs, and alumni coordination.

U.S. embassies and consulates host nearly all EducationUSA advising centers, which allows for enhanced collaboration with consular sections and other embassy and consulate staff members. The Opportunity Funds program that supports academically talented, economically disadvantaged students operates through the advising centers in Botswana, Eswatini, Ethiopia, Ghana, Kenya, Malawi, Namibia, Nigeria, Rwanda, South Africa, Togo, Uganda, and Zimbabwe.

Regional Overview

Open Doors reported that Sub-Saharan Africa again marked record-high numbers of students studying in the United States in the academic year (AY) 2017-2018, at 39,479, a 4.6-percent increase over the previous year, and the highest percentage increase of any world region. The past five years saw an increase of 29 percent, a figure that also deserves note. In 2012, only 30,046 Sub-Saharan African students studied in the United States.

The overall increase in Sub-Saharan African students studying in the United States was led by 10-percent growth in graduate study (11,892), followed by 8.8-percent growth to 4,765 students in Optional Practical Training (OPT), and 2.4 percent growth for undergraduate study (21,627). Sub-Saharan African students go to the United States to earn degrees; only 3 percent of students (1,195) are studying in non-degree programs, a 15.8-percent decrease in AY 2017-2018. The increase in graduate, undergraduate, and OPT students more than compensated for the decrease in non-degree students.

Although African students study throughout the United States, Texas is the most popular state, with 14.7 percent of all Sub-Saharan Africans studying in the Lone Star State, followed by New York, Massachusetts, California, and Florida.

West Africa is responsible for 51.7 percent of Africa's total population studying in the United States, followed by East Africa with 23.0 percent, Southern Africa with 13.6 percent, and Central Africa with 9.0 percent. East Africa experienced



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



the largest percentage of growth at 7.2 percent. Although there was a 4.2-percent decrease in F-1 visa issuances in fiscal year 2016 throughout Sub-Saharan Africa, the number of exchange visitors (J visa issuances) increased by 1.7 percent.

Graduate Students. The number of graduate students from Sub-Saharan Africa continued to grow, with the following countries sending more than 100 graduate students and experiencing

growth rates greater than the average rate of 10 percent: Ethiopia (32.1 percent), Tanzania (26.3 percent), Cote d'Ivoire (20.8 percent), Nigeria (12.3 percent), and Ghana (10.6 percent). Countries that send more than 75 students and have more than 30 percent of their students in the United States at the graduate level include: Eritrea, Ghana, Malawi, Niger, Nigeria, Sudan, and Uganda. The West African nation of Niger is new to this category.

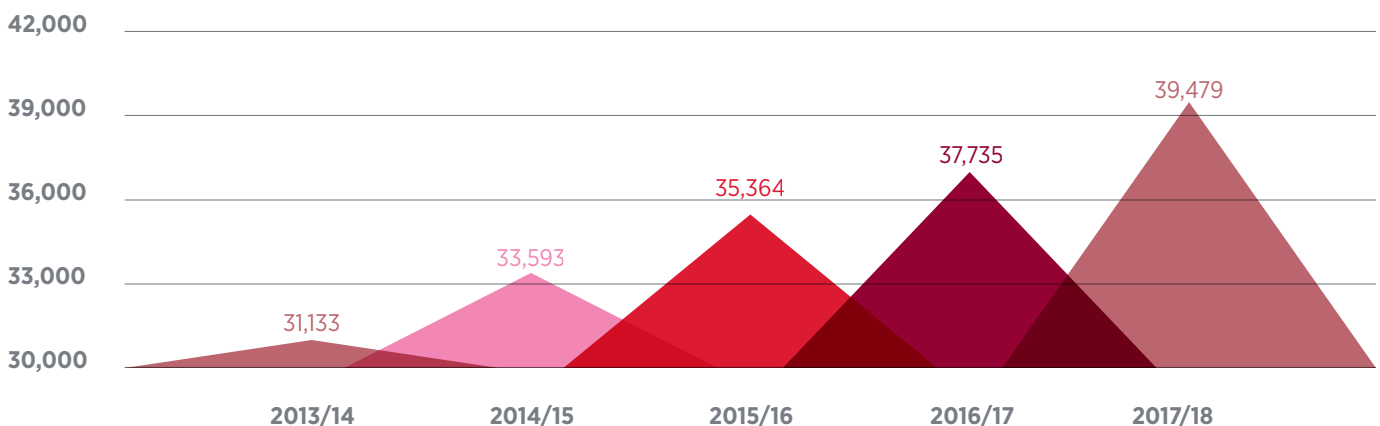
Undergraduate Students. East Africa's undergraduate student growth topped the Sub-Saharan Africa region at 6.4 percent, while Central Africa had the largest percentage of undergraduate students studying in the United States at 67.8 percent. A significant number of countries send more than 70 percent of their students to the United States at the undergraduate level. These are Angola, Burkina Faso, Burundi, Cabo Verde, Central African Republic, Equatorial Guinea, Democratic Republic of Congo, Gabon, Lesotho, Republic of Congo (Brazzaville), and Somalia.

Students throughout Sub-Saharan Africa are status- and ranking-conscious and tend to shy away from institutions unless they know other students attending the school. Admissions officers are well-served to include current Sub-Saharan students in their recruitment plans, as personal outreach makes a real difference.

Community Colleges. Approximately, 17 percent of Sub-Saharan African students attend community colleges. EducationUSA advisers promote the community college model and encourage students who have an interest in community colleges to select schools that have articulation agreements with four-year institutions that offer programs in students' area of academic interest.

Areas of Study. As a result of strong cultural and parental influence, most African students start their study in science, technology, engineering, and

Student Mobility in the Region (Five-Year Trend)



Sub-Saharan Africa

mathematics (STEM) and pre-professional fields, but exposure to new fields in the United States inspires them to explore other fields of study. The freedom to choose their majors, combine disparate fields, and get practical experience is particularly appealing to Sub-Saharan African students. It is common for students to major in the field their parents require and minor or double-major in a field of their true interest.

University Partnerships. Developing university partnerships with Sub-Saharan African universities provides another indirect way to recruit students. Once an institution is known as a partner in a country, students will consider the school as a study abroad option. The following partnerships exemplify the types of relationships between universities possible in Sub-Saharan Africa.

In South Africa, Rutgers University is working on a project to improve Ph.D.-level education in collaboration with a consortium of South African universities with an USD\$83,000 U.S. embassy seed grant. This grant is part of a larger multimillion-dollar initiative spearheaded by the South African Department of Higher Education focused on developing long-term partnerships between historically disadvantaged universities in South Africa and U.S. universities. The goal is to recruit 114 South African doctoral students to receive mentoring during U.S.-based exchanges over four years with the overarching aim of doubling the number of South African Ph.D. graduates in South Africa, with U.S. support, by 2030.

In Cameroon, the PK Fokam Institute of Excellence has partnerships with the State University of New York (SUNY) at Canton and with Kennesaw State University for general academic cooperation and program development.

The University of Zimbabwe works with the SUNY Buffalo School of Pharmacy staff and student exchange to facilitate access to analytical facilities, exchange of academic materials, and participation in seminars and academic meetings. The University of Zimbabwe and Chinhoyi University have partnered with SUNY Buffalo to establish the Zimbabwe International Nanotechnology Centre.

Since 1989, the University of North Carolina (UNC) has partnered with the Ministry of Health in Malawi in the UNC Project-Malawi, a research, care, and training facility that identifies innovative methods of reducing the risk of HIV and infectious disease transmission through research and improved patient care.

The University of Arizona has begun a partnership with the University of Mauritius based on a “micro-campus” concept, with a University of Arizona staff member based in Mauritius under a Memorandum of Understanding (MOU). Also, in Mauritius, Iowa Wesleyan University has partnered with JSS Academy (an Indian engineering college with a branch campus in Mauritius).

When institutions develop partnerships, having realistic expectations and developing a long-term engagement approach is the best way to sustain

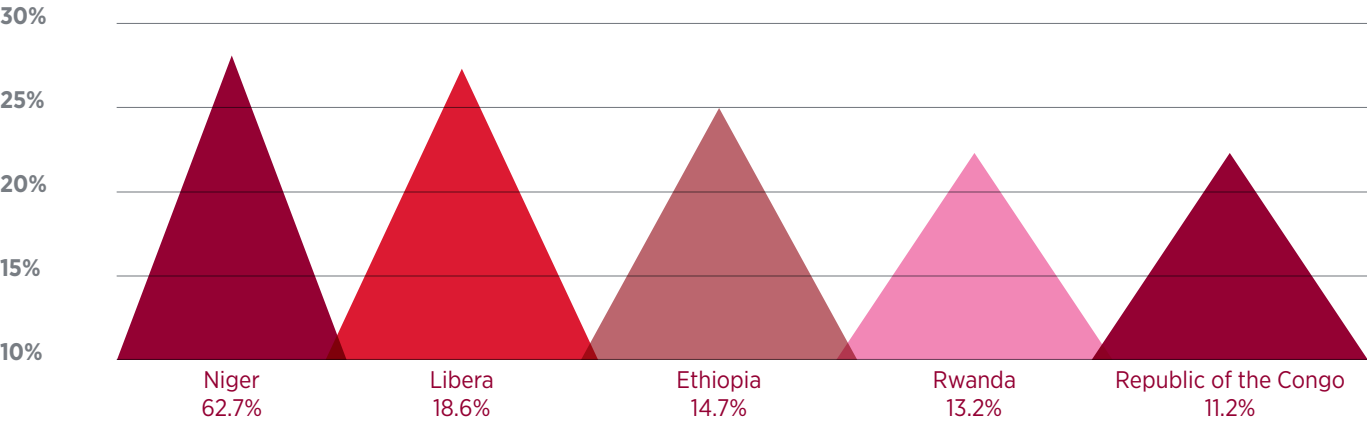
collaborations that benefit both institutions.

In-Person and Virtual Contact. It is important to travel to Sub-Saharan Africa. Students and families are more likely to invest in educational institutions with which they have had face-to-face contact. EducationUSA and U.S. embassies and consulates actively support U.S. higher education institution (HEI) travel in the region and seek to maximize visitors’ experiences. EducationUSA advising centers frequently host webinars and welcome the chance to make more virtual connections.

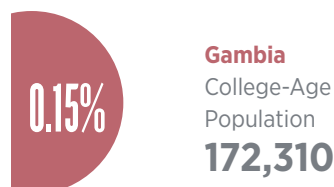
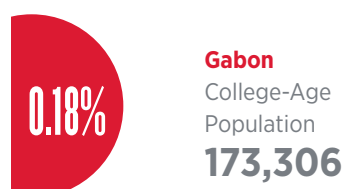
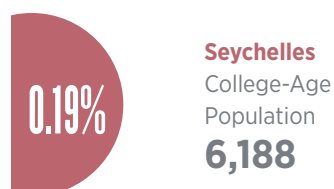
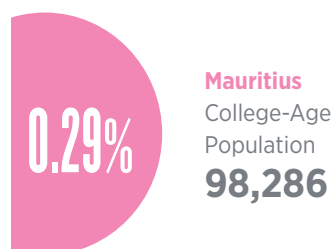
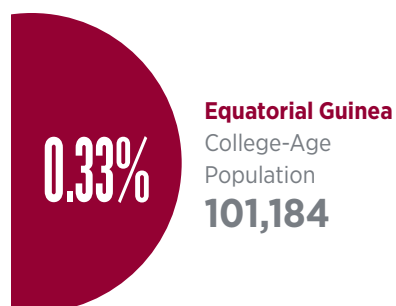
Recent Trends
Interest in graduate study among Sub-Saharan African students continues to grow, and as more students’ complete undergraduate degrees in the United States or do so in their home countries, the trend will likely become even more robust. Graduate study in the United States is particularly desirable because of the breadth of programs offered, in contrast to the limited offerings usually provided at home. Students from smaller countries will need to look abroad for graduate study in fields beyond the most basic ones.

The United States continues to be the most sought-after destination among Sub-Saharan African students, even though they study in many countries. Competition from countries such as China, North Korea, Russia, and Malaysia is real, as is long-standing competition as a result of historical colonial ties with the United Kingdom and France.

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: 2016 Population of the official age for tertiary education, both sexes

Parents generally have a positive view of the United States and want their children to study in the United States; however, many parents are concerned about safety and security, which does affect their decision-making. Providing clear information about safety measures, regulations, and policies on campus, particularly for residence halls, will resonate positively with Sub-Saharan African parents. Students will also benefit from having this information to share with their parents, and students should be encouraged to broach the subject of how seriously U.S. institutions take the issue.

Countries in the Spotlight

In Sub-Saharan Africa, the following 11 countries send more than 1,000 students to the United States (in order of number of students sent in AY 2017-2018): Nigeria, Kenya, Ghana, Ethiopia, South Africa, Cameroon, Cote d'Ivoire, Zimbabwe, Rwanda, Angola, Democratic Republic of the Congo.

Nigeria. Nigeria sends 32 percent of all Sub-Saharan African students to the United States, and ranks 13th in the world as a sending country of international students to the United States, with 12,693 students in AY 2017-2018, reflecting 8.4-percent growth. The United Nations Educational, Scientific and Cultural Organization (UNESCO) highlights that the United States is the second largest destination for Nigerian students, after the United Kingdom. Growth in graduate student enrollment (12.3 percent) is faster than growth in undergraduates (1.4 percent), and both are well ahead of the pace for Sub-Saharan Africa.

At the undergraduate level (where 46.4 percent of Nigerians study), there are poles as far as priorities in identifying institutions. Some Nigerians are looking for good value for money, lower costs, and scholarships, while others are seeking the school with the highest ranking.

Graduate student enrollment increased 12.3 percent, bringing the total number of Nigerian students in graduate programs in the United States to 4,762. Nigerians are looking for universities with strong reputations that carry weight internationally because they will be returning home to a highly competitive job market.

Kenya. Kenya is Sub-Saharan Africa's second largest source of students in the United States, and the United States remains the number one destination of Kenyan students with 3,322 students in AY 2017-2018. Undergraduate study remains higher for Kenya than any other country in the "Spotlight," with 58.1 percent of students studying at the undergraduate level and 27.8 percent studying at the graduate level.

Kenya's government tightened university admission policies a year ago, and this, coupled with an unprecedented crackdown on grading in 2017, has reduced local university enrollments significantly. Only 11 percent of students (70,000 of 615,000) passed the national exam with the required grade of C+ or higher, all of whom will be sponsored by the government for university costs. This turmoil combined with strikes and inadequate facilities at local universities leads students and their families to seek U.S. education as first-year or transfer undergraduate students.

Ghana. With a robust 3,213 students, the United States is Ghana's top foreign study destination. Interestingly, more students (1,534 or 47.7 percent) study at the graduate level than at the undergraduate level (1,111 or 34.6 percent), a unique data point among the "Spotlight" countries.

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

Country	2017/18	% Change 2016/17
Nigeria	12,693	8.4%
Kenya	3,322	4.2%
Ghana	3,213	3.3%
Ethiopia	2,118	14.7%
South Africa	2,040	6.8%
Cameroon	1,382	3.6%
Cote d'Ivoire	1,349	-0.3%
Zimbabwe	1,324	-0.5%
Rwanda	1,232	13.2%
Angola	1,183	-5.9%
DR Congo	1,123	-1.2%

Sub-Saharan Africa



One of the most stable countries in West Africa, Ghana attracts more than 30,000 international students from more than 38 African countries as well as academic partnerships and study abroad students from the United States (1,865 U.S. students in AY 2017-2018, a 19.2-percent increase over the previous year).

Ghana’s free senior high school education policy has led to a near doubling of the number of high school students across the country. Local

universities will not be able to absorb all of the would-be graduates beginning in 2020. Many students will be looking to study outside of Ghana.

Ethiopia. Ethiopia’s growing population includes 20 percent between the ages of 15 and 24. In AY 2017-2018, 2,118 Ethiopian students studied in the United States, a remarkable 14.7-percent increase, representing the largest percentage of growth in the 1,000 Student Club for Sub-Saharan Africa. According to UNESCO, the

United States is the top destination for Ethiopian students.

Iowa is the top receiving state for Ethiopian students in the United States, followed by Minnesota, New York, Maryland, and Massachusetts. Ethiopian students are most interested in studying in STEM fields, likely because of the country’s 2008 education policy that required 70 percent of all students to study science and technology. Academic institutions in Ethiopia are growing and therefore more qualified students should be in a position to consider studying in the United States.

South Africa. South Africa sent 1,156 students to study in the United States at the undergraduate level and 550 students at the graduate level in AY 2017-2018, representing a 6.0-percent increase among undergraduates and 10.6-percent increase among graduate students.

South Africa does not have the capacity to absorb all of its qualified students, resulting in many choosing to study abroad. The United States is South African students’ primary destination for study abroad, followed by the United Kingdom. The most popular fields of study are engineering, biology, business, and the performing arts.

Countries to Watch. Rwandan students are coming to study in the United States in higher numbers than ever before. Over the past five years, the number of Rwandan students studying in the United States has more than doubled, from 565 in AY 2012-2013 to 1,232 in AY 2017-2018.

Mauritius and Mauritania are two other countries to watch. They sent their

African Students by Level of Study in the United States

Associate	7,446
Bachelor	21,506
Master	12,947
Doctorate	6,764
All Other	2,926

Source: SEVIS, December 2018

Regional Student Totals Top Five Countries of Origin

Country	2017/18	%Change 2016/17
Nigeria	12,693	8.4%
Kenya	3,322	4.2%
Ghana	3,213	3.3%
Ethiopia	2,118	14.7%
South Africa	2,040	6.8%

highest numbers of students to the United States for study in AY 2017-2018; Mauritius with 288 and Mauritania with 106.

Cameroon, a country of 25.6 million people, experienced a 25.3-percent increase in the issuance of F-1 (student) visas between 2016 and 2017. Currently 1,382 Cameroonian students study in the United States, a 3.6-percent increase from the previous year. French is the predominate language of the country; in fact, eight out of the 10 regions of Cameroon are primarily Francophone, representing 83 percent of the country's population; two regions are Anglophone, representing 17 percent.

The following eight countries in Sub-Saharan Africa with less than 500 students studying in the United States have had more than 40-percent increases in student enrollment in the past five years: Sudan, Equatorial Guinea, Sierra Leone, Namibia, Liberia, Mauritania, Niger, and Eritrea (listed in percentage order).

What to Expect in the Next Three to Five Years

The World Bank reports that six of the 10 fastest growing economies in the world in 2018 were located in Africa. They are Ghana, Ethiopia, Cote d'Ivoire, Djibouti, Senegal, and Tanzania. With 40 percent of the population under the age of 16, the next three to five years represent an ideal time to expand or extend recruitment in Sub-Saharan Africa.

Virtual and Social Media Usage

Mobile telephone use has radically changed the way all of Sub-Saharan Africa operates, and the region's youth continue to be on the forefront of these trends. As in the rest of the world, social media is a driving force throughout Sub-Saharan Africa. People "live" on their phones and for many, mobile phones are the way to access the internet.

Three-quarters of the population have a SIM connection, which translates to 747 million people, according to GSMA Intelligence, a mobile data and analysis firm. The mobile subscriber rate is 44 percent, well behind the global average of 66 percent. The future for Sub-Saharan Africa is very bright. GSMA predicts that by 2025 SIM connections will reach one billion and 634 million people will be mobile subscribers, up from 44 percent in 2017. In

addition, by 2025 nearly 300 million new subscribers are expected to access the internet through their mobile devices.

It is very common for people throughout Sub-Saharan Africa to have more than one SIM connection to compensate for likely outages or slow connections on a given day. Students often rely on the dependable internet service at all EducationUSA advising centers in Sub-Saharan Africa.

Africa leads the world in digital financial services, more commonly known as mobile money. According to Kosta Perot of the Bill and Melinda Gates Foundation, 11 years after the first mobile money transactions, Africa now hosts 49 percent of the world's 277 mobile money services. He credits this astonishing growth to the inclusive, low-costs reality of digital payments (<https://mg.co.za/article/2019-03-22-00-mobile-money-moves-across-africa/>).

Approximately one-third of mobile users have a smartphone, and the number of

mobile internet subscribers in Sub-Saharan Africa has quadrupled since the start of the decade. For many users, mobile phones are the only way to get online.

Cheaper smartphones are driving the transition to mobile broadband, now available to two-thirds of the region's population. Mobile money services are extremely popular in Sub-Saharan Africa. At the end of 2017, 135 services in 39 countries served 122 million active accounts. Students conduct much of their business from their mobile phones.

According to Internet World Stats, from 2000-2019, internet usage in Sub-Saharan Africa grew 10,492 percent, from more than 4.4 million to more than 450 billion. By comparison, Internet World Stats determined that world-wide internet usage grew 89.1 percent during the same time. As of 2019, 35.9 percent of the population of Sub-Saharan Africa had internet access.

WhatsApp is by far the most popular platform for social media use, used for

U.S. Study Abroad

Top Five Receiving Countries in the Region

Destination	2016/17	% Change
South Africa	6,042	4.5%
Ghana	1,865	19.2%
Tanzania	1,364	8.8%
Uganda	845	17.0%
Kenya	778	14.2%

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

Country	2012/13	2016/17	% Change
Senegal	89	344	286.5%
Uganda	692	845	22.1%
Namibia	182	207	13.7%
South Africa	5,337	6,042	13.2%
Tanzania	1,238	1,364	10.2%

Sub-Saharan Africa

individual and group communications, including by EducationUSA advisers. Facebook remains extremely popular with 177,055,700 users out of a population of 1.06 billion people. Students know that Facebook offers the most-used platform for critical information, including EducationUSA Facebook pages.

Successful Recruiting Strategies

- Attend the first annual West African College Fair Tour from September 21-27, 2019, in Abidjan, Cote d'Ivoire; Lagos and Abuja, Nigeria; and, Accra, Ghana.
- Be aware that parents are typically the key decision-makers in the choice of a school. It is wise to engage parents, welcome their questions, and clearly explain the unique benefits of study at an institution.
- Know that Sub-Saharan African students who participate in EducationUSA Scholar Programs and other student cohort advising programs have been vetted by EducationUSA advisers and typically have worked with EducationUSA advising centers for at least one year. Through participation in cohort advising programs, these students have demonstrated resilience, motivation, and work ethic, providing a more comprehensive picture of a student than grades and test scores alone.
- Consolidate scholarships into meaningful funding awards; doing so will make a big difference in landing Sub-Saharan African students. Three USD\$10,000 scholarships will not help when a student has a USD\$30,000 gap, however offering one USD\$30,000 scholarship and enabling her or him to study in the United States will have a direct effect on others in considering an institution.
- Travel together with other HEI representatives. Small group travel personalizes the admissions process in ways that Sub-Saharan African students and parents appreciate. EducationUSA advisers in each country can assist with schedules and programs.
- Be prepared to respond to advisers' requests for materials for EducationUSA "Homegrown College Fairs" or alumni fairs. This model has been quite successful, and more EducationUSA centers will be holding fairs with alumni, Peace Corps Volunteers, embassy and consulate staff, and staff from other U.S. offices, such as the Centers for Disease Control and Prevention (CDC) and the U.S. Agency for International Development (USAID), representing their alma maters.
- Consider waiving application fees, not only to encourage applications but also because fees are a practical challenge to process for many potential Sub-Saharan African students and their families. Most 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.
- Offer vouchers for students to complete the College Scholarship Service (CSS)

Profile for financial aid. Students will appreciate vouchers or acceptance of a hard copy International Student Financial Aid Application (ISFAA) to enable as many students as possible to complete their applications.

- Offer flexibility in testing requirements, which is especially important in countries where certain tests are still not offered or are offered as paper-based (GRE, TOEFL) only three times a year.
- Remember that secondary schools may look rundown or have poor infrastructure; however, appearance is not a reflection on the quality of the education and the students attending the school.
- Clearly state the total cost of attendance on the website; hidden costs can prohibit students from attending at the last minute or present financial challenges once students are on campus.
- Respond as quickly as possible to student inquiries because students view responsiveness as a signal of interest.
- Direct admitted students to the EducationUSA pre-departure orientation sessions at EducationUSA advising centers, usually held in July. Students benefit tremendously from these cultural and logistical programs because orientation on a U.S. campus will focus on adjusting to the United States rather than understanding the difference between the United States and a particular Sub-Saharan Africa country.

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

Country	2013/14	2017/18	%Change
DR Congo	571	1,123	96.7%
Sudan	186	331	78.0%
Rwanda	720	1,232	71.1%
Mauritania	63	106	68.3%
Namibia	61	101	65.6%

96.7%

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



- Check on students once they are on campus, if at all possible. As one EducationUSA adviser said, “Word of mouth goes a long way,” particularly when students are settling into their new campuses. If students are warmly welcomed and integrated into an institution, they will spread the word about the school back home.

Foreign Government and Private Funding

Funding from governments of Sub-Saharan African countries is rare to non-existent. Botswana is one of the few countries where scholarships to study abroad include the United States. Botswana offers the Debswana Diamond Company and the Top Achiever’s scholarships.

Regional EducationUSA Events

First Annual West Africa College Fair

Tour: September 21-27, 2019

Abidjan, Cote d’Ivoire: September 21, 2019

Lagos, Nigeria: Monday and Tuesday, September 23-24, 2019

Abuja, Nigeria: Wednesday and Thursday, September 25-26, 2019

Accra, Ghana: Friday, September 27, 2019

Fairs and Conferences

Homegrown College Fairs

- Port Louis, Mauritius, May 30, 2019

- Luanda, Angola, June 2019
- Harare, Zimbabwe, July 2019
- Kigali, Rwanda, September 2019
- Democratic Republic of the Congo, during International Education Week, November 2019
- Muzuzu, Malawi, 2020

For details about recently scheduled fairs, visit individual Sub-Saharan EducationUSA country pages at <https://educationusa.state.gov/>.

U.S. Study Abroad in Africa

Study abroad participation in Sub-Saharan Africa continued to grow in AY 2016-2017, gaining more than 9.5 percent with 13,433 U.S. students

studying in Sub-Saharan Africa. South Africa is by far the most popular destination, welcoming 6,042 students, followed by Ghana (1,845), Tanzania (1,364), Uganda (845), Kenya (778), and Rwanda (380). The leading Francophone destination is Senegal, receiving nearly 344 students, which represents a 22.4-percent increase from the previous year.

Study abroad students can also serve as a way to promote an institution to potential Sub-Saharan African students. EducationUSA advising centers welcome the chance to host a U.S. study abroad student for a session on college life.

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

The best times to plan in-person travel are when schools are in session:

East Africa: March to June and October to November

Southern Africa: February to May and July to August

West and Central Africa: January to March, May to mid-July, and October to November

It is best to avoid traveling during Ramadan, Easter, Christmas, exam periods (April to June and November to December) and national elections. The dates for Ramadan and national elections vary from year to year, so please contact the EducationUSA adviser in your country of interest for the current year’s dates.

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

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EducationUSA Advising Centers in the Region

28 Comprehensive
21 Standard
15 Reference

EducationUSA advising centers in East Asia and Pacific (EAP) cover a wide geographic area and serve a diverse student population in terms of ethnicity, academic goals, financial need, and social and cultural backgrounds. Advising centers are located at an array of venues, including 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) cover the large region, and more than 70 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 533,787 students in academic year (AY) 2017-2018, the region accounts for approximately 48.8 percent of all international students in the United States, and the numbers continue to grow each year. Although AY 2017-2018 saw positive growth, the growth rate has slowed as competition for the internationally mobile pool of students has increased across the region and beyond.

Recent Trends

The region has exhibited steady growth in student mobility over the past five years as a result of continuing interest in the American higher education sector and the value attributed to international educational experiences by

communities across EAP. As competition for international students increases, however, 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 44,045 Australian students studying abroad in 2018 according to the Australian Department of Education and Training, and 371,885 international students studying at the postsecondary level in-country according to Project Atlas, Australia is both a strong source of students and a fast-growing destination for study abroad, receiving 7 percent of the world's international students. Australia is in its 28th year of uninterrupted economic growth, and education is its third largest export, with greater economic impact than tourism. The Australian government is making significant investments in international student recruitment, and allotted USD\$450 million to support growth in the sector in 2017, with a goal of enrolling 720,000 international students by 2025. According to 2018 *Open Doors* report statistics, Australia is the number 30 sender of students to the United States, and the eighth leading U.S. study abroad destination, hosting more than 10,000 American students in the AY 2016-2017.

Opportunities for athletic scholarships and sports programs at all levels of competition 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, particularly given the number of third-country nationals studying for undergraduate degrees in Australia.

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 and targeting less commonly visited states and territories such as the Australian Capital Territory, Northern Territory, South Australia, Queensland, and Western Australia in combination with visits to popular destinations such as New South Wales and Victoria. A well-planned recruitment schedule leverages both Australia's proximity to other growing markets in the region, including New Zealand and Indonesia, and opportunities for recruitment visits to EAP countries such as Singapore, Vietnam, Korea, Japan, and others with direct flights.

Brunei. AY 2016-2017 marked the lowest number of Bruneians studying in the United States for the past five years, and in AY 2017-2018, the number of Bruneian

students studying in the United States has remained unchanged. In terms of graduate studies, the number of students pursuing graduate degrees in the United States decreased by 53 percent in AY 2017-2018. The unchanged student mobility numbers for Brunei are in the context of an economic slowdown amidst rapidly falling oil and gas prices and a significant reduction in the funds allocated for national scholarship programs. As in the previous year, these economic constraints have also affected Bruneian student mobility to other countries such as the United Kingdom, Australia, and New Zealand. One point of interest is that Optional Practical Training (OPT) has more than doubled for Bruneian students in AY 2017-2018 emphasizing students' prioritization of work experience and the related additional exposure to American culture and society.

Cambodia. Cambodia's economy remains one of the fastest growing in the world. The country's gross domestic product is expected to continue growing at a rate of approximately 7 percent per year for the second year in a row. This growth creates potential in the education sector as it allows an increasing number of Cambodian students to afford study

abroad opportunities. The number of Cambodian students in the United States rose from 512 students in AY 2016-2017 to 659 students in AY 2017-2018 representing an impressive 28.7-percent increase. There is an increasing number of high-quality, private international high schools operating in Cambodia that better prepare Cambodian students to meet U.S. college and university academic entrance requirements. Many Cambodian students consider American institutions of higher education to be of the highest quality; however, affordability remains the main concern. As a result, community colleges and four-year institutions with strong 2+2 articulations agreements are attracting students' attention, as they offer more options for both access and affordability. English is used widely in Cambodia, including in government, NGOs, and the private sector. The top five fields of interest among Cambodian students are business, economics, education, political science, and English literature.

China. Once again, China remains the top sending country of international students to the United States with interest in U.S. study from students at all levels. China witnessed a 3.6-percent increase

East Asia and Pacific

in students studying in the United States according to the AY 2017-2018 *Open Doors* data. While the year-after-year percentage increase in student mobility is slowing, the AY 2017-2018 total of 363,341 Chinese students shows that the United States continues to far outpace the closest competition. When looking at *Open Doors* data for the “Top 25 Places of Origin of International Students by Academic Level for 2017-2018,” China sends the most students worldwide for undergraduate, graduate, and OPT. 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.

The number of Chinese students taking non-degree programs fell by 7.7 percent, likely as a result of increased competition from other countries. Chinese students interested in overseas education have more choices than in the past, and foreign institutions are effectively courting them with shorter-term, non-degree programs. British, Canadian, and Australian institutions in particular are a growing presence in China, recruiting more students and establishing partnerships with local schools that will likely draw increasing numbers away from the United States. It is more important than ever for U.S. institutions to continue to have a strong presence in China for recruitment purposes.

The number of Chinese students pursuing an undergraduate degree in the United States exceeded the number

of graduate students for the third year in a row. This observation reflects two related trends: the growing number of students looking to study overseas, as well as the continued growth of China’s vast middle and upper classes. Graduate students often require, and secure, scholarships and third-party funding; most Chinese undergraduates are entirely self-funded students. There is an increase in the number of Chinese students taking advantage of OPT as a key step toward securing attractive jobs when they return home. Chinese families see overseas study as an investment in future earnings and a practical return on that investment is a top priority. The top concerns for Chinese students studying abroad include safety, security, and the cost of tuition.

Indonesia. Based on 2018 *Open Doors* data, Indonesia experienced its first decline in student mobility to the United States after 13 years of continuous growth. While the decline was minimal, only 1.4 percent for AY 2017-2018, it indicates that growth is not guaranteed. The 1.4-percent overall decrease can be attributed in part to a decrease in the number of graduate students studying in the United States. In 2017, the graduate market saw an 8.3-percent increase, where in 2018, it witnessed a 3.8-percent decrease. The decrease may be the result of policy changes from the biggest Indonesian government scholarship, Lembaga Pengelola Dana Pendidikan (LPDP), or the Indonesia Endowment Fund for Education. Many Indonesian graduate students view Australia as

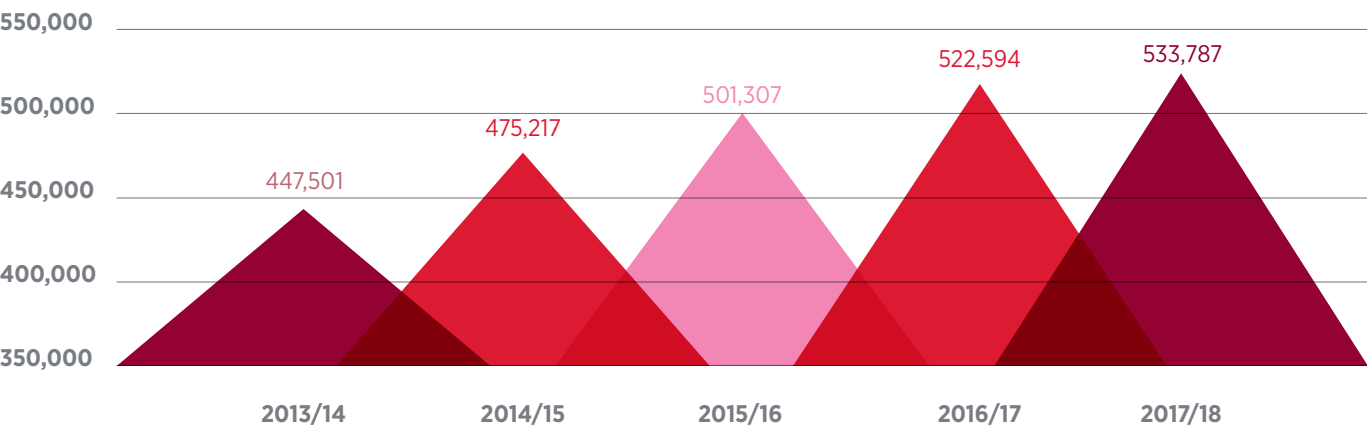
an easier-to-access higher education destination due to a less complex application process, shorter distance to Indonesia, and the opportunity for employment while pursuing a degree. Of the Indonesian students studying in the United States, 59.9 percent are undergraduates, which represents a 4.2-percent decrease from the year prior. A possible explanation for the decreased number of undergraduate students can anecdotally be linked to parents’ concerns about safety and security. Increased numbers in OPT (around 20 percent) show that Indonesian students value work experiences in the United States following graduation.

Business management, STEM, languages, education, and international relations are the most popular fields of study, and a large number of Indonesians enroll in community colleges. Indonesian universities continue to search for joint degree programs, research collaboration, and student and faculty 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,

Student Mobility in the Region (Five-Year Trend)



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, many in partnership with the private sector, to encourage universities to internationalize and to imbue the next generation of leaders with global competencies. 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. Partnerships with and mobility to community colleges are growing, constituting an area of attention for future development in the Japanese market.

Japan has some of the most active programs for sister cities, states, and other such regional partnerships in the United States. In addition to cultural exchanges and short-term exchanges at the secondary level, sister cities in the United States have offered in-state tuition, been strong exchange partners, and encouraged other close ties such as business partnerships.

Malaysia. Malaysia maintains its spot as the 21st leading place of origin for international students to the United States, although the number of Malaysians studying in the United States increased by only 0.3 percent during AY 2017-2018. The number of Malaysian students pursuing undergraduate studies in the United States increased by 4.2 percent allowing Malaysia to move up one spot to become the 14th leading place of origin for undergraduate international students at U.S. institutions. Malaysia maintains this strong presence in the undergraduate market with a three-fold rate of increase (1.4 percent to 4.2 percent) compared with AY 2016-2017 data. The percentage of Malaysian graduate students in the United States declined by

12.1 percent, possibly due to more limited funding opportunities provided by the Malaysian government. There has been a continuous increase in OPT participation over the past years demonstrating the value of U.S. work experience. Despite the decline in graduate and non-degree markets, Malaysia still successfully maintains its position as one of the top places of origin for international students.

Marshall Islands, Micronesia, Palau. It is difficult to quantify the exact number of students from these countries, which all have Compacts of Free Association with the United States, who choose to study in the United States, given their eligibility to work, study, and visit without visas. In any case, more students in these locations are seeking opportunities to pursue a U.S. education. Trends indicate that many private high school students make the leap directly to the United States to pursue their baccalaureate degrees, while public high school students typically complete their associate's degree in-country before transferring to the United States in pursuit of four-year and/or graduate degrees. Funding can be a concern for some families, but students from the Freely Associated States, as eligible non-citizens, can access federal student aid. In addition, large diaspora communities of Pacific Islanders are well-established in the United States, offering students from these countries further support as they engage in their studies.

Popular fields of study include business management, nursing and health sciences, hospitality, and education. U.S. embassies in the Pacific strongly support engagement with U.S. higher education, and excellent opportunities lie in career fairs, high school counselor training, and transfer agreements with the local community colleges, which operate under a U.S.-style system and are the highest level of education available on the islands. Because students do not need a visa and often do not appear in *Open Doors* or international office statistics, U.S. institutions may need to take additional steps to identify these students and ensure that they are both counted and provided access to support services similar to those available to other international students.

New Zealand. Student flows from New Zealand to the United States remain on an

upward trend with a 34-percent increase over 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 10 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 is consistently 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 supporting 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, the government of New Zealand announced a plan to make tertiary study more affordable, starting with one year of fee-free study for eligible students new to tertiary education. Despite this policy shift, which increases access to educational opportunity at home, EducationUSA offices in New Zealand continue to see a steady and growing level of interest in U.S. study among prospective students.

Philippines. According to the annual *Open Doors* report, the number of students from the Philippines studying in the United States increased 7.3 percent to 3,225 in AY 2017-2018, and the Philippines saw a holistic increase in all areas of study (undergraduate, graduate, non-degree, and OPT). The Department of Education in the Philippines transitioned from a K-10 to a K-12 education system in 2016, and the first cohort of K-12 graduates finished their Basic Education Program this past year. The goal of this policy shift was to establish a school curriculum that gives students enough time to acquire knowledge and skills necessary

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for success in the global economy, and the new primary and secondary sectors' alignment with the U.S. system likely contributed to the increase in mobility to the United States.

In-person engagement remains important to students and parents in the Philippines, and with competition from other countries on the rise, U.S. institutions are well-served by sustained recruitment strategies. China, in particular, has increased the number of scholarships available to students from the Philippines. Alumni associations are active and student-led information sessions focusing on U.S. college applications are an effective way to reach student audiences. In addition to these university networks, non-profit organizations such as College Admissions Mentors for Peers in the Philippines (CAMP Philippines) and Kaya Collaborative (an organization that inspires Filipino-American millennials to contribute to the Philippines) are leveraging alumni of U.S. institutions to encourage more students to study abroad. Traditional fields of study including business and management, engineering and technology, humanities, social sciences, and communications, as well as health-related fields, remain top fields of study.

Republic of Korea. The Republic of Korea is the world's number one per capita sender of students to the United States (and third in absolute terms, after China and India, each with a population more than 25 times larger). However, mobility numbers continue to decline at all levels of study as the result of an array of factors,

including the Republic of Korea's low birthrate, concerns related to the cost of a U.S. degree and future employability, as well as issues related to safety and security. China has recently risen as a major destination for Korean students, though mainly for short-term study abroad programs. Interest in Australia, Canada, New Zealand, and Europe is also on the rise among students, and the Republic of Korea itself is improving quality and building capacity within its already sophisticated higher education sector to become a hub for international education in East Asia, attracting students from all over the globe. Opportunities for U.S. institutions to effectively recruit in the Republic of Korea lie in sustained engagement, diversification of outreach, more active community college promotion, and mobilization of alumni and current students.

Second- and third-tier cities that receive little engagement from U.S. HEIs, are promising, untapped markets. Students from the Republic of Korea who study in the United States pursue degrees in a wide range of academic fields, and although more than 35 percent 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.

Internships and employment experiences are a major draw for students from the Republic of Korea, and OPT numbers showed the smallest decline (0.9 percent), with 7,714 students. U.S. institutions should

highlight not only the opportunity to pursue work experience but also specific success stories of students from the Republic of Korea. Local students respond positively to alumni and current students from similar backgrounds; however, such content is noticeably lacking or difficult to find on U.S. universities' websites, marketing materials, videos, and social media.

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 country seeks to solidify a position in the international education landscape but struggles with domestic demographics and a 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 universities in the Republic of Korea.

Taiwan. The total number of Taiwan students enrolled at U.S. colleges and universities increased for the third year in a row in AY 2017-2018. Taiwan was the seventh largest source of international students in the United States for a fourth consecutive year. According to the 2018 *Open Doors* report, there were 22,454 Taiwan students enrolled at U.S. institutions, an increase of 4.4 percent. During AY 2017-2018, the largest cohort of Taiwan students in the United States (41.1 percent) was enrolled in graduate study. More than 31 percent of all Taiwan students in the United States were undergraduates, a 7-percent increase over the previous year.

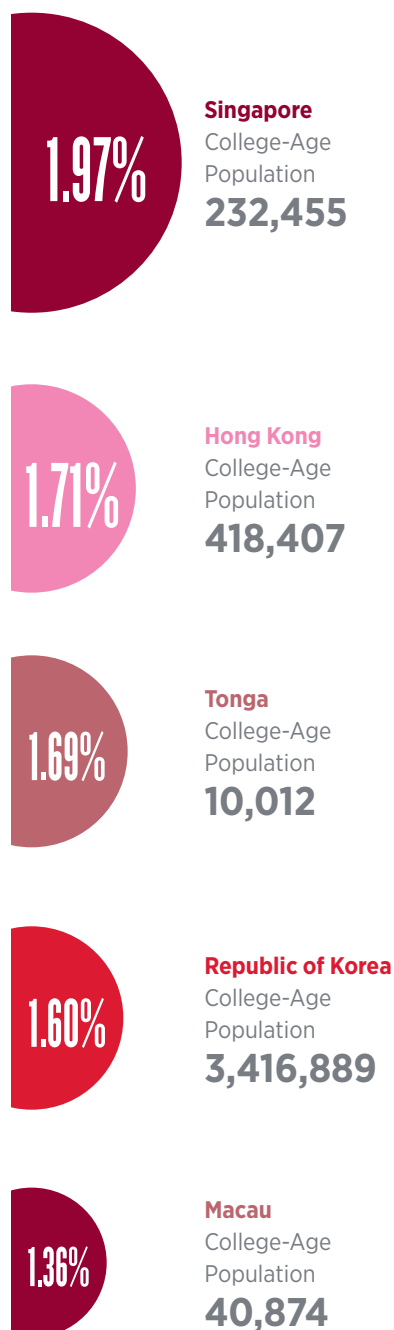
Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students in the Region (Five-Year Trend)

Country	2013/14	2017/18	%Change
Laos	57	104	82.5%
Cambodia	432	659	52.5%
Myanmar	1,042	1,569	50.6%
Vietnam	16,579	24,325	46.7%
Tonga	116	169	45.7%

82.5%

Laos 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: 2016 Population of the official age for tertiary education, both sexes

Starting in 2019, under the Taiwan Elite Scholarship, the Ministry of Education (MOE) will select 100 outstanding Taiwan Master's students to undertake doctoral programs at the top-ranked 100 universities in the world. The Ministry has budgeted USD\$1,700,000 for this scholarship program and plans to send the first Master's student cohort abroad in 2019. The Ministry will also increase internship opportunities in Taiwan and abroad. With the support of governments and enterprises, the MOE will send the students abroad for year-long internships. Realizing the falling numbers of doctoral students, the MOE plans to provide awardees with annual stipends of USD\$7,000 for research, and encourage professors to form new startup companies to engage with students. This initiative has been well-received, with the MOE receiving more than 300 applications to date.

Vietnam. Vietnam continues to be the top sender of students in Southeast Asia to the United States and ranks sixth among senders worldwide. The 2018 *Open Doors* data highlights an 8.4-percent increase in enrollment for AY 2017-2018—almost doubling the increase from the year prior, bringing the total number of students from Vietnam studying in the United States to 24,325. Business and management along with STEM remain the top fields of study among Vietnamese students. Of the total number of Vietnamese students in the United States for AY 2017-2018, approximately 27 percent are studying business (down from 30.9 percent in AY 2016-2017) and 37.7 percent are pursuing STEM (up from 32.9 percent last year), indicating that priority focus has shifted to STEM education. Vietnam continues to remain a large market for undergraduate education with nearly 70 percent of students pursuing their undergraduate studies. Recruitment fairs continue to provide the best opportunity to engage with students and parents.

Vietnamese students in major metropolitan areas have ample access to academic and English language testing centers and preparatory courses; however, such 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. The percentage of Vietnamese students studying Intensive English in the

United States continues to drop—from 9.8 percent in 2015-2016, to 5.4 percent in 2016-2017, and 5.1 percent in 2017-2018. This decline is a result of growing investment in English language training in-country, both in the public and private sectors, meaning Vietnamese students have more cost-effective, local options to improve their English language proficiency.

What to Expect in the Next Three to Five Years

- The variety and quality of global engagement and international educational opportunities available throughout the EAP region is likely to continue to expand. 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 region-wide will provide a variety of options for students to study abroad within the EAP region. Generous scholarship programs already encourage student mobility from within the region and beyond. Universities across EAP continue to build robust programming, strong institutional partnerships, and diverse international student populations that bolster international competitiveness, particularly as some countries struggle with decreasing domestic student numbers and strive to sustain local institutions. New Zealand and Australia are actively working with other governments to increase recognition of their educational credentials and create pathways for inbound and outbound mobility.

Regional Student Totals Top Five Countries of Origin

Country	2017/18	% Change 2016/17
China	363,341	3.6%
South Korea	54,555	-7.0%
Vietnam	24,325	8.4%
Taiwan	22,454	4.4%
Japan	18,753	-0.1%

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- China's Ministry of Education publicly encourages the "internationalization" of Chinese higher education with calls to hire foreign faculty and matriculate more foreign students. The number of foreign students studying at universities on the Chinese mainland is approaching the half-million marker, with 489,200 students in AY 2017, according to the latest figures from the Ministry of Education in Beijing. China has set a target to reach 500,000 foreign students by 2020. Attracting overseas talent is a major strategic goal in China's bid to shift from a manufacturing hub to an "innovation economy" and the government allotted USD\$470 million to support international student recruitment in 2017.
- EAP is a prime market for U.S. community colleges, and according to the *Open Doors* report, the top four senders to U.S. community colleges remain China, Vietnam, the Republic of Korea, and Japan. Students from these top four countries account for 42.6 percent of the total international community college population in the United States. Prospective students are increasingly interested in community colleges and are drawn to the affordability and accessibility of these institutions, as well as to the potential to complete four-year degrees in the United States through 2+2 articulation agreements. Intensive English language programs at American community colleges that offer language proficiency and the opportunity to build strong academic foundations are also of interest to students across the region. Burma, Cambodia, Laos, Malaysia, Mongolia, and the Philippines are also promising markets for U.S. community colleges.
- Internationalization of postsecondary 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. While the pool of potential students is growing throughout the country, the fastest growth appears to be in second- and third-tier cities. The number of dedicated Chinese international high schools (at which curricula preclude attending college domestically) increased from 549 in 2011 to 1,028 in 2018. An increasing number of these schools are in second- and third-tier cities. In the Philippines, Philippine Science High Schools are considered the top science secondary institutions in the country and among the best in the Association of Southeast Asian Nations (ASEAN) region. These schools allocate funds for the reimbursement of students' standardized test fees, which were previously an upfront cost that might dissuade students from applying to U.S. colleges and universities.
- Many countries in EAP are seeing increases in international, IB schools, and other special purpose schools with potential to prepare students for academic programs abroad. High school counselor and teacher training at these schools will be an opportunity to increase local capacity to support students seeking to study abroad.
- With new initiatives to diversify and expand opportunities for students, there may be an increase in students studying on J-1 visas from Taiwan, particularly in STEM fields. In addition to the Taiwan Elite Scholarship and opportunities mentioned previously, Taiwan's MOE has prioritized scholarship support for graduate study in STEM fields as a way to promote Taiwan's international competitiveness. The Ministry is also looking at ways to foster public-private cooperation through internship support for promising STEM students.
- 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. For example, 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. These kinds of exchange opportunities allow Taiwan students to pay local tuition and study at U.S. universities. Most Korean institutions have fruitful partnerships in multiple countries, but they are prioritizing relationships with institutions, American or otherwise, that offer more reciprocal student exchanges and have application processes that require less effort.
- In Singapore, there has been an increase in university partnership programs with 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, although the growth rate is starting to level. Affordability remains the largest concern for students; however, options like community college programs are generating increased awareness and interest. With the threat of increased competition in the region, it is imperative that U.S. institutions continue to prioritize recruitment visits.
- 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 the UK,

Australian, and even Chinese universities that have branch campuses in Malaysia.

- The Philippines' integration into ASEAN has resulted in a national policy requiring local faculty to obtain graduate degrees in their fields, presenting an opportunity for U.S. institutions seeking students for advanced degree programs in an array of fields. In addition, local institutions continue to express interest in practicum programs abroad and student exchanges. The Philippines saw a 22.5-percent increase in the number of students enrolled in non-degree programs. This reflects the increased interest of Filipino students and professionals in shorter programs, such as certificate and summer programs. The Commission on Higher Education of the Philippines has prioritized the development of institutional partnerships that focus on community college initiatives and peace education.
- 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 locally promote their alma maters and U.S. study. U.S. higher education representatives continue to consistently visit Vietnam, which is offering more opportunities for student engagement and recruitment than ever before, and many U.S. institutions have established strong institutional brands thanks to joint programs with Vietnamese academic partners, local offices of operation, and/or sustained engagement at education fairs. The Vietnamese government has prioritized the improvement of higher education quality, increased budget allocations for education, liberalized private sector involvement, and continued to encourage foreign participation in the development of education and training services.
- 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, full-length business and engineering programs as well as short-term English language

programs in the United States can be expected to 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 and the use of smartphones across EAP is either growing rapidly or is already at high levels, and EducationUSA advisers rely heavily on social media platforms to connect with students in all countries across the region. While the popularity of specific platforms varies by country—and with China being a unique outlier with highly regulated access beyond country-specific platforms—Facebook and YouTube remain the primary options, with Instagram use growing among younger

demographics. High speed internet is common in EAP, as is smartphone use, and 2019 will see the introduction of even faster 5G networks. U.S. institutions interested in reaching students virtually are encouraged to contact EducationUSA centers for guidance on the most effective strategies.

- 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.
- Online engagement strategies such as webinars and virtual information sessions are not as effective as in-person engagement partly as a result of the time differences and cultural factors, but if properly planned, there is potential for success. In addition to convenient timing of online sessions, webinars must be promoted far in advance through multiple channels. General informational sessions can be useful, but short sessions

U.S. Study Abroad

Top Five Receiving Countries in the Region

Destination	2016/17	% Change
China	11,910	1.9%
Australia	10,400	9.1%
Japan	7,531	5.4%
New Zealand	3,777	-0.8%
South Korea	3,770	4.1%

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

Country	2012/13	2016/17	% Change
Philippines	273	464	70.0%
Vietnam	683	1,147	67.9%
Thailand	1,923	2,763	43.7%
New Zealand	2,793	3,777	35.2%
Malaysia	237	310	30.8%

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offering a specific takeaway to a targeted audience are the most effective.

- 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 is popular among young people in China, and many educational programs are streamed to reach the widest audience possible.
- The use of Facebook, YouTube, and Instagram has grown in the Republic of Korea recently, but Naver is still the platform of choice for online searches and general information gathering. Kakao Talk and its suite of services is also used almost ubiquitously, and many U.S. institutions have taken advantage of Kakao Talk's useful outreach features including the open chat room function, which can be used to communicate with prospective and admitted students. 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.
- 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. It is important to be clear and transparent about anticipated costs so that students can determine the feasibility of an educational opportunity and to ensure that the student and family have accurate financial information.
- Provide information to students and parents about campus safety, student services, and extracurricular activities. In addition, success stories from alumni—both established and recently graduated—will resonate with the local population. When possible, organize formal or informal alumni meetings when in-country.
- Provide specific information about student internships, work-study, and other opportunities such as OPT and Curricular Practical Training. Graduate students are especially interested in gaining laboratory, research, and teaching experience.
- Community colleges should provide detailed information about articulation agreements and both two- and four-year institutions should highlight 2+2 models as academically rigorous cost-saving mechanisms.
- Community colleges should seek opportunities to highlight the successes of international students and find creative ways to partner with institutions abroad, particularly in countries in which acceptance of the U.S. community college system is on the rise, including Vietnam, Cambodia, Laos, Thailand, Burma, Japan, the Republic of Korea, Taiwan, and Hong Kong.
- 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. Highlight funding opportunities for international students as these are often difficult to locate on institutional websites. Consider country-specific landing pages in targeted markets.
- Create video testimonials to share success stories of alumni or currently enrolled international students. It is ideal to provide content in the local language or include translated subtitles for the local audience. EducationUSA centers may highlight this content on center social media pages.
- Recognize that in-person recruitment travel in the region remains a must. An investment in sustained engagement over time to build trust and name recognition is very important in Asian cultures in which students and families are brand conscious and parents are deeply involved in the selection of institutions. In addition, it is helpful to have translated information either in print or virtual resources as parents may be less proficient in English.
- Attend EducationUSA fairs, regional forums, and other programs to maximize engagement with students and EducationUSA advisers.
- Diversify outreach strategies and target second- and 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 has 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. More than 90 percent of the Chinese students studying abroad globally are self-funded, but the China Scholarship Council also offers government scholarships for Chinese and American students and faculty. This amount includes funding for Americans studying for a degree or academic credit in China and for Chinese students studying abroad. Although the official policy remains unchanged, it is expected that the Chinese Scholarship Council will shift its focus from Master's programs and increase scholarships for joint-Ph.D. programs. The Chinese government has been increasing efforts to attract foreign students to its own institutions by providing full scholarships and financial support to international students around the globe. China gives

preference to countries affiliated with the *One Belt One Road* initiative. The Chinese government's education scholarships are part of its broader effort to strengthen its economic base and expand its political influence in the region and around the world.

Marshall Islands, Micronesia, and Palau.

The governments of these three countries with Compacts of Free Association with the United States provide scholarships for students to study abroad, often on the condition that they return to the country following the completion of their degrees to provide services in their fields of specialty. Students are eligible for U.S. federal funding, including Pell Grants, and are often able to apply for domestic 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.

Japan. MEXT and Keidanren (Japan

Business Federation) provide a number of scholarship options for Japanese students. In 2014, 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 (JASSO) provides a comprehensive list of local government scholarships and other funding sources in an annual document and an updated resource online (bit.ly/JASSO); U.S. institutions are encouraged to contact JASSO and add their funding opportunities to this comprehensive list.

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

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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 declined, but major companies such as Khazanah Nasional, Petronas, and Bank Negara continue to fund U.S. educational opportunities. Many of these scholarships are reserved for U.S. HEIs that are on an internal/unofficial “Top 50” list of institutions. The MARA scholarship is reserved for Bumiputra students (Malay Muslim and associated ethnic groups).

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 the Astro Scholarship Award, the Maxis What’s Next Scholarship, CIMB, and Maybank Scholarship Program. Certain faith-based organizations in Malaysia are also working towards providing partial scholarships for students who are applying to the United States.

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 Philippine-American Educational Foundation, or Fulbright Commission in Manila, is a non-profit, bi-national organization responsible for the administration of the prestigious Fulbright Scholarship Program, Hubert H. Humphrey Fellowships, and other educational exchange initiatives. Grants are awarded on a competitive basis to Filipino and American students, teachers, scholars, and professionals to study, teach, lecture, and conduct research in the United States and the Philippines (<https://fulbright.org.ph/scholarship-programs/>).

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 (KOFAS) provides financial assistance to students through grants, scholarships, loans, and work-study programs. The foundation (www.kosaf.go.kr) administers over 1,000 scholarships for short-term overseas summer programs, and up to 50 scholarships available to qualified students from low-income households for up to \$60,000 per year for four-year degree programs.

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). 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 MOE and other 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 is committed to investing 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 International Cooperation Department (ICD), under the Vietnam Ministry of Education and Training, manages these scholarships (<http://icd.moet.gov.vn/>). ICD also manages scholarship programs jointly provided by the Vietnamese government and foreign governments through bilateral government agreements. However, some Vietnamese government scholarship programs, including Project 599 (2013-2020) and Project 911 (2010-2020), have expired with no information about a new project available at this time.

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 remains the sixth largest recipient of U.S. study abroad students and the number one receiving country in EAP overall. According to 2018 *Open Doors* data, China saw a 1.9-percent increase of U.S. study abroad students, thereby reversing the prior decline of U.S. study abroad students in 2017. China, Australia, Japan, and the Republic of Korea all saw positive growth over the previous year. The number of U.S. students enrolled for academic credit at colleges and universities in Taiwan surpassed the 1,000 mark for the first time during AY 2017-2018 academic year.

In Northeast Asia and the Pacific sub-region, Australia and New Zealand remain strong senders, as these two countries expand their visibility and their governments strengthen international education offerings and engagement. Australia saw a 9.1-percent increase over the last year, surpassing 10,000 students. Japan, with a 5.4-percent increase, has had consistently strong U.S. study abroad numbers, and as host of the 2020 Olympics Games, interest in Japan is expected to grow. The Republic of Korea, increasing 4.1 percent over the last year with 3,770 U.S. students, has also emerged as a top recipient of U.S. students, which will likely persist as the wave of interest in Korean popular and traditional culture increases. Ongoing momentum from the 2018 PyeongChang Olympics will also contribute to this trend.

According to 2018 *Open Doors* data, Southeast Asia experienced an overall 14.4-percent increase in U.S. study abroad students to the region, more than doubling the percentage increase from the year prior. Burma, Laos, Malaysia, Philippines, Singapore, Thailand, and Vietnam all showed increased U.S. student numbers from the previous year. 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 hosts the largest number of U.S. students studying abroad in Southeast Asia and welcomed 2,763 students in AY 2016-2017 representing a massive 32-percent increase.

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.

The EducationUSA Southeast Asia Fair Tour has become a staple event in the region taking place each spring. Although the exact dates are subject to change, the fair events usually take place during the months of February and March across multiple cities and countries in the Southeast Asia region.

Recruitment travel can be scheduled in the times outside of high-traffic seasons; however, it is best to plan ahead and do extensive promotion well in advance.

Times to avoid travel:

- The date of the Lunar New Year (January 25 in 2020) 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.
- In April, Songkran holidays are celebrated 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 is a consideration in countries with large or predominantly Muslim populations like Brunei, Indonesia, and Malaysia among others.
- Chuseok or Autumn festival holiday in Korea, China, Taiwan, and other celebrating countries are major closure and travel seasons.
- Major exam periods for high school students in Korea are in mid-spring and fall (dates vary from year to year).
- Winter break (late December through late February) takes place in Korea for high schools, unless advanced planning and promotion can ensure an audience.
- In Australia, avoid mid-April (around Easter), early to mid-July, late September to early October, and late December to end of January.

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, North Macedonia, Malta, Moldova, Montenegro, Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, Turkey, Ukraine, United Kingdom

118

EducationUSA Advising Centers in the Region

36 Comprehensive
35 Standard
47 Reference

In Europe and Eurasia, 118 EducationUSA centers (36 comprehensive, 35 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 and territories in the region, and 157 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 nearly 7 percent in the past five years to 92,655 students, according to the 2018 *Open Doors* report. This number represents more than 8 percent of the total number of international students studying at U.S. colleges and universities. Seventy-one percent of students from the region are studying in full degree programs at the undergraduate and graduate levels. Since 2014, the number of undergraduate students has increased by more than 12 percent, representing 59 percent of all degree-seeking students from Europe and Eurasia. The increase is especially noteworthy in light of the 7-percent decrease in the population of people ages 15–24 in the region over the past five years. In general, the region is economically and politically stable and has an established trend of increasing student mobility to the United States each year.

Approximately 8 percent of all students from the region were studying at community colleges in the United States, and community college enrollment is particularly high among students from

Moldova (26 percent), Sweden (21 percent), Albania (20 percent), Ukraine (15 percent), Poland (14 percent), Montenegro (12 percent), the Czech Republic (12 percent), and Russia (11 percent). The community college model is attractive to students in Europe and Eurasia because of the relatively low cost of attendance, simplified admissions process, Optional Practical Training (OPT) opportunities, and the ability for students to transfer to a four-year U.S. undergraduate program.

Approximately half of all U.S. students who study abroad study in this region, taking advantage of institutional partnerships, student exchange agreements, and short-term faculty-led study programs. Student mobility to the United States also depends in part on these institutional partnerships, and EducationUSA advisers provide a wide array of services to develop and support these partnerships. Advisers in Finland and France in particular have designed innovative services to meet this need.

Student athletes are an important market among undergraduate students from Europe and Eurasia, regularly earning athletic scholarships from U.S. institutions. Popular sports among students from the region include basketball, fencing, rowing, swimming, soccer, tennis, and volleyball. Southeastern Europe has traditionally been an attractive market for identifying gifted student athletes, but U.S. institutions will find highly ranked student athletes throughout the Europe and Eurasia region. For example, in 2018, the National Collegiate Athletic Association (NCAA) organized and ran a multicity tour across Germany for higher education representatives to meet with prospective student athletes, and Serbia organizes student athlete group advising sessions throughout the year.



The number of graduate students from the region has declined, but still makes up approximately 30 percent of the total number of students in the United States. Factors for the decline include a youth population decline, an increase in English-language programs offered in the region, and the increased visibility of opportunities in other countries. Countries with the greatest number of students at the graduate level in the United States include Turkey, the United Kingdom, Germany, France, Italy, Spain, and Russia. Graduate students in the region are particularly interested in the 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, Turkey, and Ukraine.

Because of the standard three-year European Bachelor's degree in many countries, students sometimes face difficulties when applying for admissions to U.S. graduate schools and semester-long exchange programs, and as a result, thematic, non-English as a Second Language (ESL) summer programs have gained popularity. Approximately 17 percent of students from the region are enrolled in non-degree programs in the United States and that number is expected to grow over the next few years. More than one-third of German and Danish students in the United States are enrolled in these non-degree programs. Programs offering only English language instruction are less popular than those offering a broader range of academic credit-bearing programs.

EducationUSA advisers, U.S. embassies, students, and parents recognize the benefits of cohort advising programs such as EducationUSA Competitive College Clubs (CCCs). These cohort programs are currently offered in Albania, Armenia, Azerbaijan, Belarus, Bosnia and Herzegovina, Georgia, North Macedonia, Montenegro, Portugal, Russia, Spain, Turkey, and Ukraine with a new cohort operating in Moldova beginning September 2019. CCCs help students prepare for the admission process and 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 a number of in-person and virtual cohort advising models used in the region.

In Europe and Eurasia, the Opportunity Funds program is available to citizens and officially recognized refugees in Armenia, Belarus, Bosnia and Herzegovina, Bulgaria, Kosovo, North Macedonia, Romania, Russia, Turkey, and Ukraine. Opportunity Funds provide assistance to students who are academically gifted but unable to afford the costs of applying and enrolling in accredited institutions in the United States. The program covers all the upfront costs of applying to U.S. institutions. Most students in this program who gain admission and a scholarship 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. Engaging with EducationUSA Opportunity Funds cohort students is an excellent way to identify talented students who are a great fit for the institution.

One factor that may help increase the number of students from the region studying in the United States is the expansion of the Future Leaders Exchange (FLEX) program for high school students. The FLEX program, which is a U.S. Department of State youth exchange program administered by American Councils, expanded to four new countries in Central and Southern Europe in 2018: Slovakia, Hungary, Czech Republic, and Greece. EducationUSA centers in these countries collaborate with FLEX on outreach efforts outside capital cities and encourage more students to submit applications to the FLEX program. FLEX alumni actively promote U.S. education to their peers and eventually study at U.S. HEIs. The FLEX program now operates in 16 countries in the region.

Countries in Europe and Eurasia face challenges due to population decline, migration, and immigration. Central and Southeastern Europe have experienced migrations of large numbers of people from the Middle East to the EU over the past five years. Cyprus has also experienced a large influx of immigrants over the past 10 years, and many migrants ultimately gain Cypriot citizenship. Concerned by demographic shifts, declining birth rates, and economic pressures, some governments in the region are responding by developing programs and policies to promote population growth, enhance workforce development programs, address concerns about brain

drain, and tackle immigration challenges facing their countries.

Turkey has the largest youth population in Europe and Eurasia, and the number of college-age youth continues to increase. Approximately 16 percent of the Turkish population, nearly 13 million people, are between the ages of 15 and 24. The public education system in Turkey is not able to accommodate all of these students and many of them choose to study at expensive private secondary schools. As parents are accustomed to investing in their children's education from an early age, pathway programs and community colleges are particularly attractive options for families from Turkey.

Enacted in 2018, the European Union (EU) General Data Protection Regulation (GDPR) is a data protection and privacy law that covers all individuals, including students, from the EU and the European Economic Area (EEA). The law protects the personal data of the people both inside and outside EU and EEA. U.S. higher education institution (HEI) representatives are advised to consult with their institution's legal counsel to ensure they are in compliance, as some websites have been blocked because they are not in compliance with GDPR. HEIs should pay particular attention to how personal data (e.g., student contact information) is collected, stored, and used to ensure compliance.

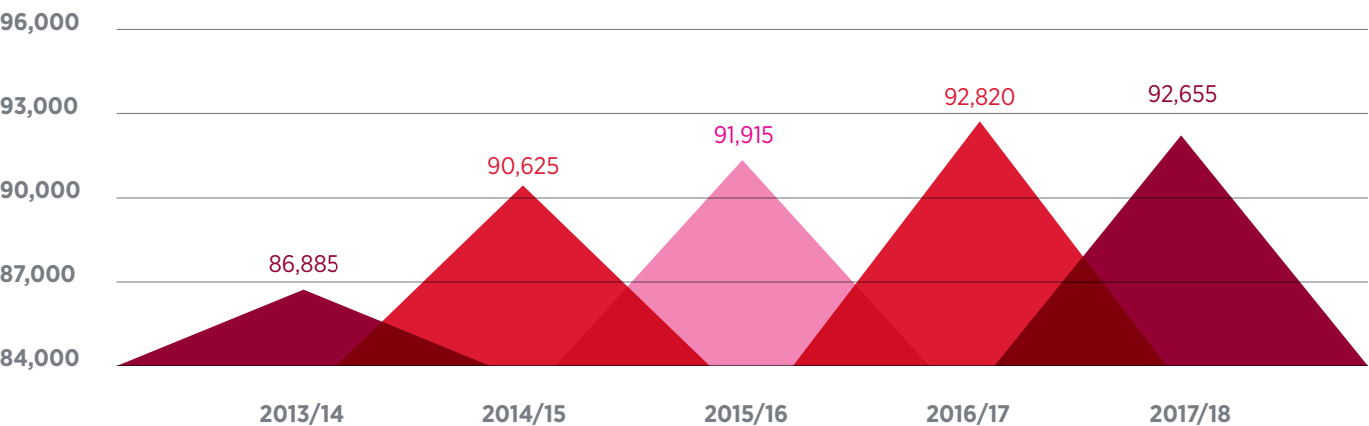
Recent Trends

- In academic year (AY) 2017-2018, *Open Doors* reported a 0.2-percent decrease of students from the region in the United States over the previous year, and 22 of the region's 46 countries reported an increase. 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 52 percent of all students in the United States from the region. Notable increases in student mobility from the previous year include Montenegro (13.9 percent), Albania (13.2 percent), Armenia (11.8 percent), Azerbaijan (10.4 percent), Belarus (10 percent), Georgia (7 percent), Ukraine (6.1 percent), the Netherlands (5.9 percent), Cyprus (5.7 percent), and Spain (4.5 percent). Cyprus is notable because it is the first time in 15 years that it has not seen a drop in the number of undergraduate students studying in the

Europe and Eurasia

- United States, indicating a newly stabilized market for future student recruitment.
- Several countries in the region host large numbers of international students and actively recruit within the region and globally. They offer programs in the English language, frequently provide generous funding, and aim to address declining populations and provide a revenue stream for HEIs. Russia has increased its international student numbers by nearly 11 percent since 2016. The number of international students studying in Russia is now 313,089, and Russia aims to reach 700,000 by 2025. A number of other countries in Europe and Eurasia also have ambitious international student recruitment goals.
 - Erasmus+ programs provide generous support for European students to participate in an international education experience primarily in Europe. The dynamic program continues to grow thanks to significant support from the EU for the program's next phase, which will begin in 2021. Erasmus+ presents the United States with its greatest competition for students from Europe and Eurasia. Because of the popularity of Erasmus+ and other EU-supported programs, students in the region generally engage in international education experiences at a higher rate than do students in the United States. As many as 30-40 percent of all Swedish higher education students, for example, study abroad during their higher education career.
 - Financial aid for students from certain countries in Europe and Eurasia is portable. These programs have varying rules and regulations including award amounts, duration of support, and other factors that influence students' ability to study in the United States. Advisers stay abreast of these changes and are able to provide updated information on these programs. Norway, for example, recently modified its financial aid regulations for study abroad and students are now permitted to apply the aid to cover all four years of an undergraduate degree rather than just the final three years as it was in the recent past. Conversely, the Netherlands no longer offers student study grants, meaning that students and their families need to contribute more to finance their education.
 - Currency values have been a major factor in the region over the past several years, especially the strong U.S. dollar compared with most other currencies, including the Euro, Pound, Ruble, and Turkish Lira. The value of some national currencies is influenced by the price of oil, especially in Russia and Norway. However, a drop in the value of a currency relative to the U.S. dollar does not always equate to a drop in student mobility to the United States. Check with advisers to learn more about the impact of currency fluctuations in their countries.
 - When recruiting in the region, institutions should include information about short-term programs in addition to semester and yearlong opportunities. Many HEIs that recruit in the region note that their student exchange agreements are oversubscribed, meaning more European students are ready to participate than Americans, and the agreements are not balanced. Some countries have also experienced a particularly notable decrease in the number of American students recently, such as France, Belgium, and Turkey. In Turkey, the U.S. Embassy in Ankara is addressing safety concerns by organizing security briefings for HEIs to directly address concerns about recruiting and placing American students in the country.
 - European students are increasingly aware of and interested in OPT and JI internship programs. The number of students from Europe and Eurasia participating in OPT did not increase from the previous year, but has increased 37 percent over the past five years. It is difficult for students from the region to gain practical work experience in their career field as students in Europe, so participation in OPT is a major advantage of studying in the United States. OPT numbers for students from Spain and Russia increased by more than 20 percent over the past year, and OPT participation rates are greater than 40 percent from countries such as Albania and Slovenia.
 - A major concern for students and parents from the region continues to be the cost of studying in the United States. The consequences of the financial crisis of 2008/09 continue to reverberate across the region; however, the impact has been

Student Mobility in the Region (Five-Year Trend)



uneven and unexpected in some cases. Spain, for example, has experienced a long period of a particularly high unemployment rate and the number of students studying in the United States has increased significantly during this time. As the economies of these countries continue to improve, rates of study abroad participation will also change, and EducationUSA advisers can provide more details and insights into anticipated trends.

- Uncertainty regarding Brexit, the withdrawal of the United Kingdom from the European Union, remains a challenge, and it is still not known whether European students will be able to apply Erasmus+ support to study abroad in the United Kingdom and vice versa in the future. Despite this uncertainty, student mobility to the United Kingdom remains strong and grew 9 percent in 2018. However, as EducationUSA tracks mobility shifts to and from the United Kingdom, it is notable that between 2015 and 2017 there was a 2-percent drop in the number of German students in the United Kingdom. As a result of increased competition from other countries in the region, including lower costs and new English language programs, the dynamic recruitment landscape in Europe and Eurasia is always changing, and EducationUSA advisers can help U.S. colleges and universities better understand the region and its opportunities.
- Technology fields such as computer graphics and video games are increasingly popular among students. At the graduate level, molecular biology and genetics, robotics, Master of Business Administration (MBA) programs, and finance are also very popular, particularly in countries like Turkey, the Baltic countries, and the Caucasus region. As a result of current international issues that are playing out locally in the region, cyber security and media literacy studies are also growing in popularity; students are eager to address challenges facing their countries. In addition, EducationUSA advisers in Cyprus have reported a notable increase interest in the arts including theater, dance, and music.
- The economies of many countries in the region remain strong and families throughout the region are committed

to providing students with a quality education. Countries such as Austria have enjoyed an increase in the number of private, English language-instruction institutions. As students from the region learn English more proficiently and U.S. colleges and universities continue to promote their programs in the region, more students that are qualified will likely pursue educational opportunities in the United States.

Countries in the Spotlight

Belgium. The Kingdom of Belgium is located in the heart of Europe, bordering France, Germany, Luxembourg, and the Netherlands. At just less than 12,000 square miles, this country the size of Maryland has had a significant impact on the historical, political, and economic life of Europe. Students in trilingual Belgium have access to affordable Bachelor's and Master's programs among excellent research universities, globally competitive business and management schools, practice-oriented degrees at university colleges, and schools of arts. However, each year, more than 1,000 choose to pursue academic studies in the United States (43.5 percent at the undergraduate level; 25.4 percent graduate; 18.9 percent non-degree, mostly student exchanges; and 12.2 percent in OPT/ internship experiences). The rate of student mobility to the United States is steady, increasing from 948 in 2014 to 1,080 in 2018. Academic programs of particular interest to Belgian students include short-term summer non-English language programs, legal education programs (e.g., LLM), and the technology and engineering pieces of the STEM family of programs.

Located in the capital city of Brussels, EducationUSA Belgium is the “one-stop shop” for recruitment and advising in Belgium. The newly-expanded EducationUSA advising center is centrally located in the Royal Library of Belgium. The new center, which includes a comprehensive resource library, offers space for individual and group advising, workshops, and meetings with U.S. college and university representatives. A team of dynamic young advisers are always looking for new ways to promote academic exchange between the United States and Belgium, whether through individualized meetings with U.S. HEI representatives to develop a successful in-country recruitment strategy or through Facebook Live information sessions for students across the country. In addition

to its in-house activities, EducationUSA Belgium organizes a successful undergraduate college fair, Brussels College Night, every autumn and has been a stop on the annual EducationUSA LLM Tour since its inception.

EducationUSA Belgium is located within the Brussels Fulbright Commission, which administers the Fulbright Program for citizens of Belgium and Luxembourg as well as the unique, EU-wide Fulbright-Schuman Program. The Commission has strong ties to the European Commission's Directorate-General for Education, Youth, Culture and Sport, and EducationUSA advisers are available to advise U.S. HEIs on opportunities to further internationalize their campuses through European Commission funding schemes, which promote both incoming and outgoing student and staff mobility. Belgium serves as an excellent hub from which to engage Western Europe and the larger Europe/Eurasia region.

Finland. The number of Finnish students studying in the United States has steadily grown since 2012, up 20 percent overall with an even higher percentage in the non-degree category (especially students on exchanges and participating in short-term programs). The United States is the sixth most popular study abroad destination for Finnish students who select to complete full higher education degrees abroad and seventh most popular destination for shorter international study periods, such as those based on an exchange agreement between U.S. and Finnish institutions.

Gaining international experience is a standard element of a degree program in many of the Finnish HEIs and is a push factor for U.S. study. Approximately 25 percent of degree-seeking students in Finland complete an international study abroad experience and business, humanities, social sciences, and arts are popular fields for Finnish students in the United States. Short-term study opportunities, such as a one semester exchange, are of particular interest to students, and Finnish institutions are interested in establishing new partnerships with U.S. institutions to create more mobility opportunities for students, faculty, and staff. According to the 2018 *Open Doors* report, 22.7 percent of Finnish students in the United States participate in short-term programs, up 24.3 percent from AY 2016-2017.

Europe and Eurasia

EducationUSA services are housed at the Fulbright Finland Foundation, which has a specific mandate to support the internationalization of education and research in Finland; to help U.S. and Finnish institutions create linkages, partnerships, and lasting collaboration; and to enhance U.S.-Finnish student, faculty, and staff mobility. The Foundation provides U.S. institutions concrete tools for creating linkages with Finnish institutions, and it is active in organizing training services, mobility programs, and study tours for U.S. and Finnish institution representatives to meet and connect. U.S. institutions looking to increase the number of Finnish students on their campuses or considering collaboration with Finnish institutions (on joint degrees and mobility agreements, for example) are encouraged to connect with EducationUSA advisers based at the Foundation.

Georgia. Student mobility from Georgia to the United States has been increasing for the past 10 years, and today nearly 600 students from Georgia study in the United States; half of them are studying at the undergraduate level. During this time, the Georgian economy also experienced positive growth at an average annual rate of 4.5 percent, and the gross domestic product (GDP) per capita increased by around 28 percent (Source: worldbank.org).

The Georgian government has prioritized continued economic development through STEM education throughout the country. In collaboration with the Millennium Challenge Corporation (MCC), Georgia opened the San Diego State University Tbilisi Campus

in 2015 that offers Bachelor degrees in the STEM fields, and as many as 700 Georgian students are expected to graduate from these programs by 2020. In addition, MCC funding supported renovations for 91 regional public schools with fully equipped STEM labs, training for 20,000 STEM teachers and principals nationwide, and STEM programs to engage 35,000 students. As a component of these projects, the Georgian government also made all STEM fields at national universities tuition-free and has provided funds for start-ups and techno-parks in all of Georgia's major cities. This intense preparation in the STEM fields at the secondary and university levels make Georgian students attractive candidates for admission to U.S. programs in these fields at both the undergraduate and graduate levels. The Georgian government and HEIs are also eager to further develop connections for student and faculty exchange and for joint research initiatives.

In 2016, Georgians became eligible for visa-free travel to the Schengen zone, making it not only a popular tourist destination but also more attractive for short-term exchange programs and students seeking full degrees. Funding from EU HEIs has also increased for Georgian students in recent years, which is one of the main reasons Georgians pursue higher education in the EU. UNESCO data shows that roughly one-third of all academically mobile Georgians are studying in the EU or Schengen zone. With the rise of English-language programs in Europe and generous funding, this comparatively easy access to European institutions will continue to represent a challenge for U.S. institutions wanting to attract Georgia's finest students.

EducationUSA Georgia conducts extensive outreach from the country's five centers and closely collaborates with the U.S. embassy and government of Georgia to promote educational and leadership opportunities to Georgian youth. The EducationUSA advising team launched a new CCC, called the Leadership Academy Georgia, in January 2018, and the first cohort graduated from the program in January 2019. The call for new cohort applications wrapped up in February, resulting in 114 applications, of which 58 percent were from the capital and another 42 percent from 10 regions across the country. The Leadership Academy Georgia is a completely virtual cohort that provides support to students throughout the country and is another way U.S. HEIs can access well-prepared and highly qualified applicants from Georgia.

Greece. Despite the challenging economic environment that Greece has been facing since 2009, the overall number of Greek students in U.S. HEIs has continued to rise. According to the 2018 *Open Doors* report, there are 2,395 Greek students in the United States at all levels of tertiary education, a 30-percent increase over the past eight years. In addition, the number of students on OPT exceeded 18 percent of the total student body in 2017-2018. Greece is also a top destination for U.S. study abroad with 4,351 U.S. students in 2017-2018, a 21.1-percent increase from the previous year.

The large number of Greek students interested in U.S. studies is attributed to the positive reputation the U.S. higher educational system enjoys among Greek

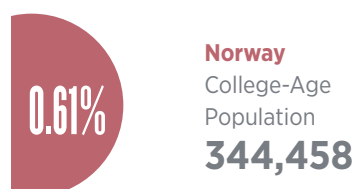
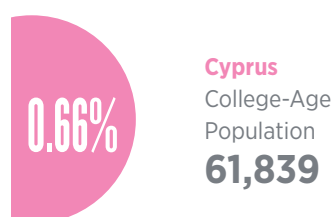
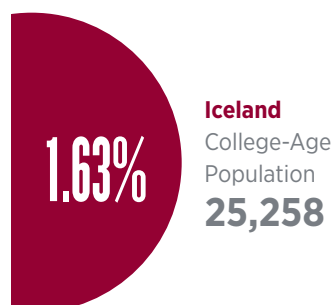
Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students in the Region (Five-Year Trend)

Country	2013/14	2017/18	%Change
Kosovo	112	229	104.5%
Spain	5,350	7,489	40.0%
Albania	636	884	39.0%
Slovenia	188	250	33.0%
Ukraine	1,464	1,928	31.7%

104.5%

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: 2016 Population of the official age for tertiary education, both sexes

people. Greeks are attracted to U.S. higher education because of the rich academic opportunities and sources of financial aid that help make a U.S. higher education attainable for many Greeks. The students who pursue study in the United States may be talented undergraduate students, accomplished student athletes, or graduate students who have excelled at Greek universities. A majority of Greek students is enrolled in graduate programs and they combine local scholarships with financial aid from host institutions in the United States to pursue Master's and Ph.D. programs. Most graduate students are interested in engineering and computer science, the pure sciences, business, architecture, and law. In general, the most sought-after fields are the "hard sciences."

The EducationUSA center in Athens is housed at the Fulbright Foundation in Greece. The center and its staff are very active in outreach events throughout the country where they cater to both undergraduate- and graduate-bound students. In 2017-2018, EducationUSA Athens conducted outreach to 1,200 students and parents. In early October of each year, U.S. admissions reps, students, parents, and counselors participate in the United States University Fair in Athens. This fair is the only one of its kind in Greece, and EducationUSA Greece and Fulbright Athens organize and run the event. Greece also has an extensive network of alumni who promote their alma maters, and Fulbright students, scholars, and educators who assist in promoting U.S. higher education.

Italy. Among the EU member states, Italy ranks fifth in student mobility to the United States. Italy has strong outbound and inbound study opportunities. Over the past five years, the number of Italian students studying in the United States has grown consistently, both at the undergraduate and graduate levels, reaching 5,789 students in 2018. Italian students are very interested in internships, employment opportunities, and OPT programs. Italy steadily retains its spot as the second most popular destination globally for U.S. students studying abroad, following the United Kingdom. There are two EducationUSA centers in Italy, one at the Fulbright Commission in Rome, which serves northern and central Italy, and one at a branch office of the Fulbright Commission in the U.S.

Consulate in Naples that serves the south of the country.

The major challenges for advising in Italy are high youth unemployment, low average family income, and cultural resistance to high-budget education, mostly in the south of Italy. However, study in the United States is recognized for the quality of higher education and the opportunity students have to personalize their own fields of study, explore interdisciplinary interests, and develop hands-on experience in their fields. While Italian higher education is also recognized for its high-quality, in-depth, and comprehensive curricula, and very rigorous theoretical content, it is also perceived by some Italians as highly centralized and offering less flexibility than the U.S. system of higher education.

STEM fields are the most attractive fields of study for Italians. In Italy, facilities are sometimes lacking and it can be harder to find programs that offer interdisciplinary approaches to STEM research. LLM programs in the United States are also very popular in Italy. Many students and their families know that Milan, and to an extent Rome as well, host an impressive number of prestigious international legal firms in which a candidate holding an LLM from the United States might enjoy faster career advancement. In November 2018, Italy joined the EducationUSA LLM tour and hosted its first event in Milan, connecting hundreds of LLM candidates with U.S. higher education representatives.

Fulbright scholarships represent the most important source of funding for U.S. study in Italy, and cover as much as USD\$38,000 for Italian students who want to study at the graduate level. The Italian Fulbright

Regional Student Totals Top Five Countries of Origin

Country	2017/18	% Change 2016/17
United Kingdom	11,460	-0.3%
Turkey	10,520	-0.6%
Germany	10,042	-1.2%
France	8,802	-0.1%
Spain	7,489	4.5%

Europe and Eurasia

Commission partners with the Zegna Foundation, which provides full scholarships to economically disadvantaged students who apply for graduate studies at U.S. universities. The Fulbright Commission also provides grants for research and teaching experiences in the United States. Bilateral university exchange programs have been increasingly popular in recent years, and they allow undergraduate university students to spend a semester in the United States and return to finish their studies at an Italian university. Italian universities are eager to find partners in the United States to further develop this type of partnership.

Russian Federation. Beginning in 2014, diplomatic relations between the United States and Russia have faced significant challenges, yet student mobility between the United States and Russia has remained stable and interest in studying in each country continues to be strong. According to the 2018 *Open Doors* report, 5,518 students from Russia studied in the United States. Of this number, approximately 43 percent are studying at undergraduate institutions, and the overall number of undergraduate students has increased by 21 percent over the past five years. Among English-speaking countries, the United States remains the top destination for Russian students and is ranked third overall after China and Germany according to Project Atlas, though the Russian students in the United States represent only 14 percent of all academically mobile Russian students.

Since the U.S. Consulate General in St. Petersburg closed and U.S. Embassy and consulate staff in Russia decreased significantly in 2017, access to student visas has become among the top concerns for U.S. institutions and Russian students. While the wait time to receive a tourist visa can be significant, student visa applicants have remained a priority category for adjudication by the State Department, and the current wait time for student visas to the United States in Moscow and Yekaterinburg is two days and one day in Vladivostok. In addition, students can apply for visas in neighboring countries where the demand for student visas is not as high. When working with Russian students, U.S. higher education representatives are encouraged to process their financial aid and I-20s as soon as possible so that students can receive a student visa on time.

Toward the end of 2018, the U.S. Department of State changed the travel advisory from Level 3 (Reconsider Travel), to Level 2 (Exercise Increased Caution). During the period of the Level 3 designation, many U.S. institutions scaled back or canceled their study abroad programs in Russia and limited their students from pursuing programs in Russia. Even with these restrictions, the 2018 *Open Doors* report shows the number of American students studying in Russia increased by 13.6 percent in AY 2016-2017 from those reported in AY 2015-2016. With the travel advisory at Level 2, the number of American students in Russia will likely continue to increase, along with increases in the number and types of U.S. HEIs engaging in-country with Russian audiences.

Economic sanctions starting in 2014 and the decline in global oil prices have negatively affected Russia's economy. Per capita GDP dropped from USD\$16,007 in 2013 to USD\$8,759 in 2016, but returned to USD\$10,743 in 2017 (Source: data.worldbank.org). Even with the significant devaluation of the Russian ruble to the dollar over this time (Source: Bloomberg.com), student mobility to the United States remained stable.

The economic challenges facing the country have made students and parents savvy when making investment choices for their education. They are more willing to shop around for the options that will yield the highest return on investment; in other words, what schools and programs offer the best future career prospects to a student. U.S. higher education representatives looking to recruit in Russia should focus on conveying a clear message about why a particular school might be a best fit for Russian students. Engaging university faculty, international students, and alumni with connections to Russia to tell the institution's story helps Russian students see themselves on campus and feel encouraged to apply. Stories featuring the classroom and lab experiences, interactions with professors, extracurricular activities, internships, OPT opportunities, and post-graduation opportunities are all especially appealing to students from Russia.

Spain. The number of Spanish students studying in the United States has grown steadily over the past decade, increasing 52 percent between 2012 and 2018. In

2018, 40 percent of Spanish students studying in the United States were enrolled in undergraduate programs, 27 percent in graduate programs, 19 percent in non-degree programs, and 13.5 percent in OPT and internship programs. Fields of study of particular interest at both the undergraduate and graduate levels include engineering, business, and legal education programs including LLMs. According to UNESCO, the United States hosts the second largest number of students from Spain after the United Kingdom.

Based in the United States-Spain Fulbright Commission, EducationUSA Spain works closely with the Commission's programs, providing advising, communication, and promotional support. EducationUSA Spain welcomes the involvement of the Fulbright English Language Teaching Assistants (ETAs) in Spain who participate in pre-departure programming. ETAs are also involved in the various opportunities available through the country's CCCs cohort-advising program that has operated since 2013, averages 50 students per cohort, and lasts for two years per cohort. U.S. HEIs are encouraged to engage with Spain's CCC by contacting the EducationUSA adviser and considering offering scholarships for talented students who participate in the program and are an excellent fit for the institution.

In 2018, Madrid held its first LLM fair as part of the annual EducationUSA LLM Tour. The fair was a big success and Madrid will participate again on the LLM Tour scheduled for mid-November. EducationUSA Spain will also hold a U.S. university fair in Madrid on September 25 as the kickoff to the five-city Western Europe Fall Fair Circuit. Over the past year, EducationUSA Spain has conducted webinars hosted with U.S. HEIs, including community colleges, and will continue to do so in the future. These presentations with HEI representatives cover a wide-range of topics and HEIs are encouraged to contact the advising team in Spain to get involved.

What to Expect in the Next Three to Five Years

There are a variety of demographic trends across the region, ranging from countries that have increasing populations of college-bound students like Turkey to countries in Europe that are experiencing significant declines. Other countries, such as the United Kingdom, are experiencing temporary

declines in the number of college-bound students but are expected to recover in the coming years. By 2020, the number of 18-year-olds in the United Kingdom will begin to increase again after several years of decline, and by 2030 will have increased more than 20 percent over one decade. Another good example is France, where the number of college-bound students is expected to grow 14 percent by 2024. The sharp rate of demographic declines that practically all former Soviet states experienced starting in the 1990s has either slowed or reversed, and the population of the region is beginning to increase, such as in Azerbaijan, where the population has increased by 10 percent in the past 10 years. These demographic trends are key to watch and understand when developing a recruitment strategy for the region.

Educational systems in Europe and Eurasia, especially at the secondary school level, continue to undergo important changes. The French Baccalaureate, which is the national high school diploma, will undergo reforms starting in 2019. The UK government has made significant changes to UK high school qualifications that affect students in England, Wales, and Northern Ireland who are applying to U.S. universities over the next few years. Consult with advisers in these countries and others to get more detailed information on changes to national educational systems before starting the next recruitment cycle.

The rate of student participation in study abroad from countries throughout the region is expected to increase over the coming years. Some countries have mapped out national strategies and participation rate goals to promote international study. In Germany, one-third of all students spend time abroad during their studies, and the Federal Ministry of Education and Research aims to increase that number to more than 50 percent by 2020. In 2019-2020, Norway will publish a government white paper that sets new targets for Norwegian student mobility growth.

Another recent trend has been the development and promotion of study abroad programs offered in the English language in non-native English speaking countries such as Austria, Germany, the Netherlands, Poland, and even Russia. However, in some of these countries, these English language programs have become

controversial and there appears to be a re-invigorated push to teach only in the native languages in several of those countries. EducationUSA advisers can provide updates on the latest trends during the research and recruitment planning phases.

In Central and Southern Europe, several education ministries are supporting and promoting dual and cooperative education at vocational high schools. In Slovakia, some universities offer professional four-year baccalaureate degree programs that primarily focus on practical and professional experiential training. Serbia has undertaken several measures to counteract brain drain by funding more IT departments in high schools and has increased university admission quotas for such programs. Dual education programs are also offered in the region, and students gain work experience in companies during their studies to develop hands-on skills.

Some governments in the region have become increasingly sensitive to the

promotion of foreign degree programs abroad and are eager to fight brain drain in their respective countries. When working with U.S. HEIs, government and institutional representatives tend to prioritize institutional partnerships that focus on short-term student/faculty exchanges, dual degrees, internships, or joint research. U.S. institutions should strive to understand the country's development goals and focus their outreach message to promote programs on their campus that align with established goals in the target countries.

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 generally very stable, reliable, and inexpensive throughout the region.

U.S. Study Abroad

Top Five Receiving Countries in the Region

Destination	2016/17	% Change
United Kingdom	39,851	1.8%
Italy	35,366	1.4%
Spain	31,230	4.2%
France	16,462	-4.4%
Germany	12,585	5.8%

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

Country	2012/13	2016/17	% Change
Iceland	280	1,052	275.7%
Portugal	197	693	251.8%
Estonia	80	170	112.5%
Slovenia	49	103	110.2%
Croatia	245	505	106.1%

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- Engagement on Snapchat and group advising on text platforms, such as WhatsApp and Telegram, is expected to increase in the future.
- VKontakte remains an extremely important platform for reaching Russian-speaking communities throughout the region.
- Facebook continues to be the most used platform in Europe and Eurasia, though its popularity appears to be declining. It is used to administer groups, organize events, and stream live broadcasts, and will probably endure as the most popular platform for outreach over the next few years.
- EducationUSA advisers create Facebook Live events on a frequent basis now, and they tailor these to specific audiences, such as students participating in

cohort advising programs and HEI representatives based in the United States. EducationUSA advisers encourage U.S. higher education representatives to offer webinars on themes most relevant to students, such as popular majors on U.S. campuses, career planning and degrees, and how to select a major. EducationUSA advisers often invite current international students from the target region or country to lead these informal webchats with prospective students. Webinars are recorded and sent to students across the region through a variety of platforms and are an effective way to engage students, especially if they cover topics related to the admission process, such as the Common Application or persuasive essay writing for applications. EducationUSA Bosnia Herzegovina and EducationUSA Kyiv offer particularly frequent and engaging

webinars for their students. U.S. HEIs interested in engaging with students virtually should contact EducationUSA advisers in their target countries to learn how to get involved in upcoming programs and for recommendations on format and content to most effectively reach their target audience.

- Virtual advising is particularly important for countries where students live far from advising centers. The EducationUSA center in Denmark, for example, provides virtual advising sessions for students in Greenland and the Faroe Islands. Cohort advising has also increasingly moved onto virtual platforms such as Skype, Zoom, and Google Hangouts, allowing more students to access EducationUSA and peer support services.
- EducationUSA in Armenia, Azerbaijan, Belarus, Spain, Georgia, Russia, Albania, Bosnia and Herzegovina, Ukraine, Sweden, North Macedonia, Norway, Netherlands, Poland, and Turkey actively use Instagram to connect with audiences by highlighting in-center events, outreach trips, adviser participation in U.S.-based conferences and trainings, and student success stories. EducationUSA advisers are eager to show images from U.S. campus life to local student audiences as well, so HEI reps are encouraged to provide images depicting the vibrancy of their institution to advisers.
- The Belgian and Luxembourg Fulbright Commission runs a very popular YouTube channel that features informational videos as well as interviews with students and representatives of U.S. universities. Centers in Belarus, Czech Republic, Russia, and Ukraine have active channels where they livestream events, include short instructional videos, and feature interviews with alumni. The Russian language content produced by Belarus and Russia is shared throughout the Russian-speaking world.
- 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 or visiting faculty from the target country, and the communities where U.S.

institutions are located. When sending video content be mindful of allowable lengths; Instagram, for example, limits video lengths depending on the type of post (live video, video post to profile, and post to a story).

Successful Recruiting Strategies

- Students are perceptive consumers and shop around for the best deal that will provide the greatest return on their investment. Emphasizing internships and career advising services is essential during the recruitment process. Like most regions around the world, students in Europe and Eurasia increasingly seek OPT and other internship opportunities after completing their academic programs, and universities should describe the services and partnerships that students can participate in to help them achieve their career goals.
- The region is becoming increasingly diverse, especially in larger cities. For example, 10 percent of all young people in Norway (25 percent in Oslo) have a family background from Asia, Africa, the Middle East, South America, or Turkey. When engaging these students, institutions should highlight the diverse nature of their campuses and how they achieve inclusion for all students.
- Students in the region tend to think about their higher education options much later than students in the United States (the last year of secondary school), so American HEIs should be prepared for that cultural difference. As many students in the EU complete their Bachelor's degree in three years, graduate programs should consider targeting current university students in their sophomore year of studies and ensure their institution accepts a three-year undergraduate degree.
- Alumni fairs are fairs led by the alumni of U.S. institutions. They continue to be popular events to display the diversity of institutions and the students who study at them. These fairs introduce potential applicants to institutions that may not actively recruit in the region. Albania, Armenia, Azerbaijan, Georgia, North Macedonia, Moldova, Romania, Russia, Serbia, and Ukraine host annual alumni fairs each spring. Lithuania hosted an alumni fair for the first time in May and other countries are expected to add alumni fairs in the near future.
- Local and American alumni at these locations are welcome to participate in these types of fairs and often include Peace Corps volunteers, Fulbright ETAs, study abroad students (including those on scholarship programs such as Gilman), U.S. diplomats, and leaders in the local community. Best practices include providing training for alumni on how to represent their institution effectively, and mailing promotional materials to the advising center for distribution at the event.
- Students outside capital cities in Europe and Eurasia rarely have the opportunity to meet with U.S. higher education representatives in person. EducationUSA advisers can provide guidance on destinations to visit in their countries where schools have not yet heavily recruited, and they can often assist with organizing presentations at regional schools, universities, American Spaces, and youth centers. Depending on the travel budget, advisers might also be available to travel with U.S. higher education representatives to certain destinations.
- Many 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. Germany and Switzerland have well-developed vocational/apprenticeship options, and U.S. HEIs are encouraged to accept students on the vocational track or establish partnerships with local vocational HEIs.
- 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 promote opportunities for those students to participate in programs that range from several weeks to a year in duration.
- EducationUSA advisers can provide formal and informal capacity-building support for the exploration of institutional partnership development. Advisers in Belgium help to administer the Fulbright International Education Administrators Seminar for dozens of U.S. HEIs. Finnish advisers focus intently on institutional partnership development, and the U.S. Embassy in Paris recently launched the Franco-American Academic Exchanges website, which serves as a clearinghouse for French and American secondary-level schools and HEIs seeking partnerships in the other country. Every year, EducationUSA has a pavilion at European Association for International Education (EAIE) which, like NAFSA, offers an excellent opportunity to meet with institutional representatives from across the region (EAIE occurs in late September).
- Advisers can provide U.S. HEIs with information about international days at local universities and the dates for EducationUSA and third-party provider recruitment fairs across the region. Many countries have large career and educational fairs in the capital cities that attract thousands of students, and EducationUSA often participates in these events. Be sure to finalize recruitment travel schedules early as these events may reach capacity quite early. More information about these events can also be found on the educationusa.state.gov website.
- U.S. institutions are encouraged to prepare their U.S. study abroad students to promote their institution and cooperate closely with the local EducationUSA advising center. U.S. students participate in events at advising centers or American Spaces where they engage with local audiences.
- Many advising centers implement innovative programs to work more closely with local teachers and counselors. Austria, Cyprus, and Georgia all have well-established programs to engage counselors. During EducationUSA-administered fairs, programming often includes meetings for U.S. HEIs with local teachers and counselors, particularly in Turkey and Spain.
- Anything U.S. HEIs can do to cut costs and simplify the application process will get the attention of students in the region. This could include waiving

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external testing requirements, providing an application fee waiver, accepting the Common Application, allowing the transfer of International Baccalaureate (IB) credit, and ensuring that the institution's website is easy to navigate, includes a direct contact for international students, and prominently displays information on international student scholarship eligibility requirements.

- HEI representatives should focus on the unique strengths and highlights of their institutions, including at the programmatic-level. Students are also interested in learning more about the surrounding area and the local community and surrounding region. Students and European institutions still like to have hardcopies of materials and brochures. Tactile materials are still very important, and European institutions often use them extensively. EducationUSA advisers maintain resource libraries, so U.S. HEIs are welcome to mail materials to the centers to support students and their own recruitment efforts.
- HEIs should diversify their outreach efforts and broaden their focus to include more than only so-called “feeder” schools. Many countries also have specialized public high schools that focus on STEM, the arts, or other fields, and they often provide significant instruction in English as well, even though they are not part of the IB system or considered an international school. EducationUSA advisers can help identify new outreach options.

Foreign Government and Private Funding

EducationUSA advisers stay abreast of new and evolving scholarship programs in their countries. Visit the educationusa.state.gov advising center page to contact centers and learn more about funding opportunities for students from Europe and Eurasia.

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-Euro students, educators, and administrators. Visit ec.europa.eu/programmes/erasmus-plus/node_en to learn more about the program. 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; and 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. In addition to the commissions, Fulbright awards are available in each country in Europe and Eurasia. 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. The Albanian American Development Foundation fully funds Master's degrees for Albanian professionals for selected fields of study.

Armenia. More than 15 private foundations provide scholarships for Armenians to study in the United States. All details are listed on the Yerevan Center's page.

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 who want 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. Several private foundations 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 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. These programs are generally similar to gap-year programs, and students already enrolled in an institution of higher education can participate.

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.

Finland. League of Finnish-American Societies, SAM (<https://samsuomi.fi/activities/>) provides funding for doctoral students. There is also student aid from the Finnish government for studies abroad, including in the United States, for as much as USD\$1,350/month (grant and loan).

Germany. German Academic Exchange Service (DAAD) provides semester or year scholarships for non-degree programs at the undergraduate and graduate levels. Arnold-Heidsieck-Scholarships are available from *Die ZEIT* foundation and can cover one year of undergraduate studies in the humanities. Approximately 30 year-long scholarships are available to graduate students through the Association of German-American Clubs and can cover most programs except medicine and law.

Georgia. The Georgian government has offered funding for graduate degrees since 2014. The average award is approximately USD\$20,000, and students who receive this funding are expected to return to Georgia and work in the public sector for at least three years. Funding is available to all fields of study, though the number of scholarships for MBA and LLM programs is limited. The awards are administered by the International Education Center and are announced around the end of May each year.

Hungary. Rosztoczy Foundation (www.rosztoczyfoundation.com) provides financial aid for students and researchers for a maximum of one year to study at a U.S. university. *Magyar Állami Eötvös Ösztöndíj* is a three-to-eight-month scholarship for pre-doctoral or post-doctoral study and research (www.tka.hu). The Hungarian American Coalition Internship Program is a short-term internship opportunity for Hungarian university students at Washington, DC-based institutions to motivate them for public service (<http://www.hacusa.org/cip/>). The Josephine de Karman Fellowship Trust offers a scholarship of USD\$25,000 for one academic year for Ph.D. candidates currently enrolled at U.S. universities

(www.dekarman.org/qualifications/).

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

Italy. Since 2017, the Italian Fulbright Commission with the Zegna Foundation provides full scholarships to economically disadvantaged graduate students.

Lithuania. The Lithuanian government is expected to offer scholarships for Lithuanian students applying to, or already studying at, universities and colleges that are listed among the top 100 institutions in world-ranking systems. The scholarships are available for the full period of study (from 1 to 4 years), and the maximum award amount is around USD\$23,500 per year. Funding is available in all academic fields and levels, awards are administered by the State Studies Foundation, and the deadline is in June each year.

Luxembourg. Every student resident of Luxembourg is eligible to receive financial support for higher education studies. 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. The *Centre de Documentation and Information sur l'Enseignement Supérieur (CEDIES)* oversees this program.

North 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, airfare, and a monthly stipend.

Netherlands. *Studiefinanciering DUO* is a low-interest student loan for undergraduate and graduate study. 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 including *Prins Bernhard Cultuurfonds*, *VSB-fonds*, and *Vrijvrouw 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.



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Norway. 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. The funding is for students in full-time academic programs at both the undergraduate and graduate levels and the loan/grant package depends on a variety of factors and criteria. The package is as much as USD\$19,000 per year with supplemental funding available based on a variety of factors.

Russia. The Global Education Program, funded by the Russian government, supports graduate studies in high-tech (engineering), public administration, education administration, and social services fields (particularly public health and health administration). The program was extended until 2025 and includes 79 U.S.-eligible institutions. More information is available on the program's official site www.educationglobal.ru/en/.

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). The funding is as much as USD\$11,000 per year.

Slovenia. The Ad Futura scholarship offers students as much as USD\$35,000 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. In future 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 (CSN) is the government's academic financial aid program and 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. The

amount per year depends on expense category and totals approximately USD\$8,692 per grant. Supplemental loans are also available to students. Students can receive loans and grants for a maximum of 240 weeks (~6 years) of study.

Switzerland. The Swiss Benevolent Society of New York offers scholarships, including the Medicus Student Exchange Program, the Sonja Streuli Maguire Outstanding Scholastic Achievement Award, and the Swiss Benevolent Pellegrini Scholarship (www.sbsny.org/scholarships/scholarship-programs). Students can apply for study stipends and loans from their Cantonal government for a semester or year-long study abroad or exchange program. A full list of foundations that offer this funding support can be found at www.swissuniversities.ch/en/services/scholarships-for-study-abroad/more-information/foundationsfunding/.

United Kingdom. The Sutton Trust Program welcomed its eighth cohort of students in April 2019 and 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 as much as 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.

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) 2019 September 24-27, Helsinki, Finland. More than 5,700 higher education professionals from more than 95 countries attended the 2018 EAIE conference in Geneva, Switzerland. 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 2019 EAIE conference. Learn more at <https://educationusa.state.gov/events/educationusa-pavilion-eaie-2019> or www.eaie.org/helsinki.html.

The first annual **Western Europe Fair Circuit** will include five fairs and is an efficient way to maximize recruitment efforts across Western Europe. The cities and dates for these well-attended events are Madrid, Spain—September 25; London, United Kingdom—September 27-28; Brussels, Belgium—September 30; Amsterdam, Netherlands—October 3; Luxembourg City, Luxembourg—October 4. For more information about the circuit, please contact eurfairs@educationusa.org.

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).

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 (~10,000 attendees). It is a unique event that will take place in Zagreb on October 15 and Rijeka on October 17.

The **9th Annual Eurasia Tour** will take place in five countries and include fairs in St. Petersburg and Moscow, Russia; Yerevan, Armenia; Tbilisi, Georgia; Minsk, Belarus; and Kyiv, Ukraine. Information about the tour will be available at www.educationusaeurasiatour.org.

EducationUSA will host its **5th Annual European LLM Tour** in November 2019. This year's tour will stop in London, Paris, Brussels, Amsterdam, Istanbul, Milan, and Madrid. Contact REACs Peter Baker (pbaker@educationusa.org) and Gordana Mirchikj (gmirchikj@educationusa.org).

EducationUSA Vilnius will host an EducationUSA Pavilion at the annual **STUDIES** education expo, which takes place February 6-8, 2020. Please contact EducationUSA adviser Renata Zukovska at rzukovska@educationusa.org for more details.

The **7th Annual Russia Winter Tour** is scheduled for February 8-16, 2020, and will include stops in St. Petersburg, Moscow, Yekaterinburg, Novosibirsk, and Vladivostok. This is a smaller tour with 5-10 institutions on average participating in the full tour, and is scheduled so that those who want to attend the EducationUSA Pavilion in Vilnius may do so. The registration deadline is November 15, 2019, and tour information will be available at www.winter.educationusarusssia.org.

The **7th Annual EducationUSA Southeastern Europe Tour** in spring 2020 will include fairs in Slovenia, Croatia, Bosnia and Herzegovina, Serbia, Montenegro, Albania, North Macedonia, Kosovo, and Albania. EducationUSA will confirm the dates in summer 2019. Sign up at eepurl.com/bUIB0T 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.

In March, **EducationUSA Ireland** in

Dublin hosts its annual **EducationUSA Seminar in Dublin City Centre**. U.S. HEIs are welcome to attend and advise Irish students about applying to U.S. HEIs in general. Higher Options usually takes place in September and is an annual three-day education expo for second-level students that takes place in Dublin; it is the largest forum of its kind in Ireland.

BeSt³ Vienna, the largest education fair in **Austria**, will take place in March 2020 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.

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. Education Norway also plans to offer its 2nd College Night in October or November 2019.

Join **EducationUSA Sweden** in 2019 at the CIS Student Recruitment Tour—Malmö/Lund and Stockholm in fall 2019; Global Study Forum—Anna Whitlocks Gymnasium Stockholm in October; Kunskap & Framtid—Education Fair in Gothenburg in November; and SACO Fair in Stockholm and Malmö in November and December.

De BuitenlandBeurs is in the **Netherlands** on November 22 and 23, 2019. The Amsterdam MBA Fair takes place in fall 2019.

In **Turkey**, **A2** and **IEFT** are two major fairs that take place every fall and spring in Istanbul, İzmir, and Ankara.

U.S. Study Abroad in the Region

In AY 2016-2017, more than half of the U.S. students who studied abroad studied in Europe, and the overall number increased by 2.4 percent from the previous *Open Doors* report. The top five destinations globally continue to be the United Kingdom, Italy, Spain, France, and Germany. Other European countries in the top 25 worldwide 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 percentage increases include Albania, Cyprus, Greece, Hungary, Iceland, Moldova, North Macedonia, Portugal, and Slovenia.

In the spring 2019 semester, 45 percent of all Gilman Scholarships were awarded to U.S. students for study abroad experiences in 28 of the 46 countries in the Europe and Eurasia region. The U.S. Department of State's study abroad branch has 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, Turkey, and Ukraine.

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.

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. Avoid recruitment travel or virtual programming in July, August, over the Christmas and New Year holidays, and around Easter. Please also note that Christmas and Easter are observed according to Roman and Orthodox calendars, so these holidays might differ depending on the countries. Advisers in each country know about national holidays and other factors, such as examination dates, that might affect students' ability to attend events. As always, institutions should check with the EducationUSA advisers in the country they want to visit before making any travel or virtual outreach plans.

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

27

EducationUSA Advising Centers in the Region

15 Comprehensive
8 Standard
4 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 27 centers (15 comprehensive centers, eight standard, and four reference centers) in 19 countries/territories with 29 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 the 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 overall growth over the past decade, the 2018 *Open Doors* report indicates an 8.6-percent decrease in students coming from the region during academic year (AY) 2017-2018 compared

with AY 2016-2017. This decline from the MENA region represents a decrease for the second consecutive year, with Qatar (-20.6 percent), Saudi Arabia (-15.5 percent), UAE (-9.7 percent), and Libya (-18.8 percent) decreasing significantly as a result of the scaling back of government scholarship programs, recent changes in mandatory military service requirements, growing higher education options in the region, and increased competition from other countries. However, student numbers from select countries grew, including Algeria with an increase of 10.4 percent.

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 process. 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. Currently, there are CCCs in Egypt, Lebanon, Morocco, the Palestinian Territories, 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 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 section. 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 an 8.6-percent decrease in the number of MENA students enrolled at U.S. colleges and universities in AY 2017–2018. The decline in new enrollments is predominantly the result of the scaling back of government scholarship programs in Saudi Arabia, Bahrain, Iraq, Libya, Qatar, and UAE. These countries combined had a decline of 15.3 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 partnerships with local institutions. There is also new growth in the region, with notable increases in U.S. enrollment from Algeria, Palestinian Territories, Oman, Tunisia, and Lebanon.

Over the past decade, MENA has experienced one of the highest rates of population growth of any region in the world. 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. Science, technology, engineering and math (STEM) fields are



in high demand, and there is a growing interest in health fields.

Students in countries including Lebanon and Tunisia are interested in exploring the benefits of 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 agreements. The Bureau of Educational and Cultural Affairs also supports the International Visitor Leadership Program (IVLP), which connects current and emerging foreign leaders with their American counterparts through short-term visits to the United States.

In 2018, several IVLP projects focused on building capacity in the higher education sector for professionals from the MENA region. Topics included university partnerships, university admissions processes and study abroad in America, best practices in higher education advising, and public-private partnerships in higher education.

- 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. Scholarship programs are directly tying scholarship objectives and fields of study to national labor market needs.
- 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, Qatar, 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.

Middle East and North Africa

branch campuses in Qatar (six) 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 (-15.9 percent), Oman (-9.3 percent), and Saudi Arabia (-46.5 percent). Most Saudi scholarship students begin their studies in language programs, and as a result of the scaling back of the government scholarship program as a whole, IEP numbers have dropped significantly. According to the Institute for International Education *Open Doors* report, the overall number of students enrolled in IEPs fell by 20 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, introduced 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

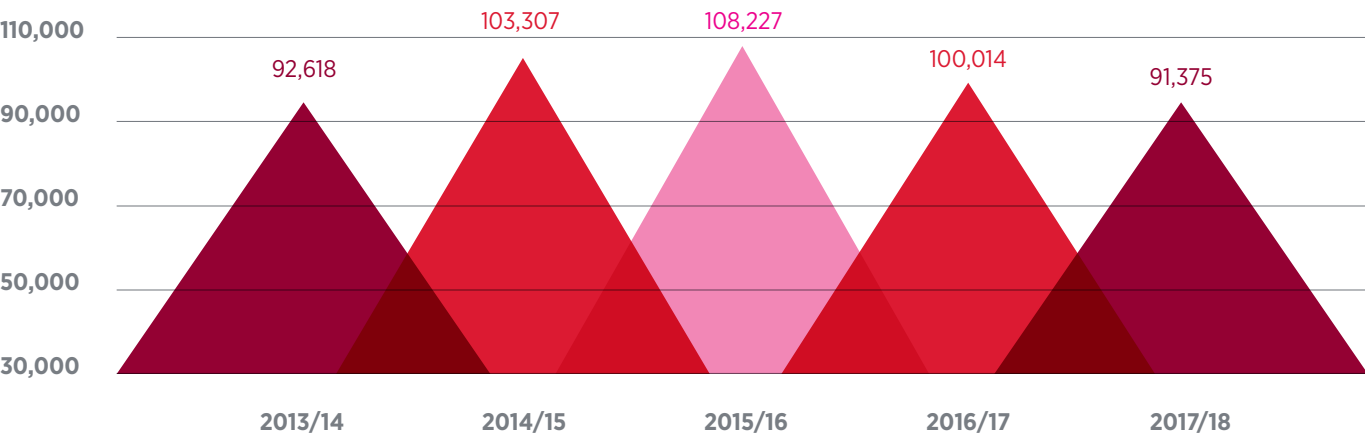
Algeria. The number of Algerian students interested in studying in the United States is growing, with the younger generation enthusiastic about studying English. The U.S. higher education system offers welcome diversity and choice to Algerian students, specifically at the graduate level. This is the second consecutive year that Algeria saw an increase in students coming to the United States (10.4 percent). 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. However, EducationUSA activities include a specific focus on student athletes who would like to continue in their sport while pursuing higher studies. As a result of the difference in educational systems, many who go to Europe end up leaving their sport despite many years of practice and training.

Egypt. The youth population of 18- to 27-year-olds in Egypt is more than 21 million. Despite being the most populous Arab country, Egypt ranks fourth among the MENA countries sending students to the United States (after Saudi Arabia, Iran, and Kuwait). Egypt’s education system suffers from overcrowding, outdated approaches to teaching, and choice of major being dependent on test scores. This last issue affects the labor market, which leaves some fields more populated and graduates left with limited options. STEM fields are still very popular among Egyptian students, but given the need for educational reform, fields of study related to transformational leadership, organizational change, and education would be valuable. Social media is used heavily in Egypt for peer learning and promoting U.S. educational opportunities and events. Facebook fans of EducationUSA Egypt have increased from 154,428 in October 2016 to 179,824 in October 2018.

Saudi Arabia. Saudi Arabia, the largest sender of students from the region, saw a 15.5-percent decrease in the number of students sent to the United States in AY 2017–2018.

Student Mobility in the Region (Five-Year Trend)



This decline is the first since AY 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. As of February 19, 2019, the Ministry of Education announced that there were 92,997 Saudi students overseas with 51,083 in the United States. Sixty-six percent male and 34 percent female. The United Kingdom, Australia, Germany, and Ireland followed in popular destinations. Better post-graduation job placement has the potential to increase enrollment. Saudi Arabia has three approved lists of universities and colleges for students. The first is the *Recommended List* for students who want to study on their own. The second is a *Short List* of 280 institutions worldwide that includes 80 U.S. institutions for the scholarship program. The third is the *Elite Program List* that includes the top 20 universities around the world, 14 of which are U.S. institutions. 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. Many Saudi students are looking for OPT and Curricular Practical Training (CPT) opportunities.

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, low tuition cost, a simpler application process, degree equivalency, similar education structures, and French-language instruction. However, there are still opportunities to attract Moroccan students. During AY 2017-2018, Morocco saw a 4.3 percent decrease with just less than 1,570 students who studied in the United States. Initial discussions are currently underway to explore a shift from the license system to a four-year Bachelor's degree, which would make it easier for Moroccan students to successfully transition to graduate school in the United States. There is also a growing focus on English language instruction in Morocco, so in the coming years, more students may look for programs with English language instruction.

105.9%

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	2013/14	2017/18	%Change
Oman	1,504	3,097	105.9%
Kuwait	7,288	10,190	39.8%
Tunisia	538	728	35.3%
Egypt	2,832	3,701	30.7%
Iran	10,194	12,783	25.4%

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- 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. STEM education along with technical and vocational training is a major focus. A key area of emphasis 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. The UAE is also

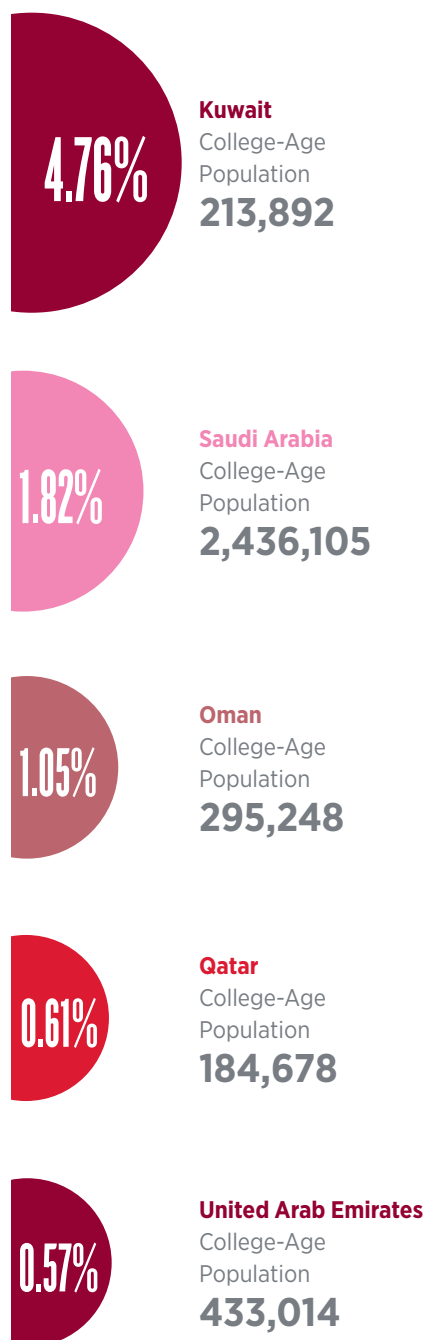
making it easier for foreign nationals to stay in-country to finish their higher education by easing visa restrictions and allowing students to work.

- 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.

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 to 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

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: 2016 Population of the official age for tertiary education, both sexes

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 the *Global Digital Report 2019* by We Are Social, there were 290 million internet users in the MENA region in 2018. 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 and HEI newsletter in Farsi (www.educationusairan.com). In 2018, the website was revamped and updated in both English and Farsi and features 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 launched various global advertisement campaigns through Radio Javan, a premiere source of Persian and Iranian music. Operating from Washington, DC, Radio Javan broadcasts in Farsi with an international reach via its website,

mobile application, radio, TV channel, and social media platforms. According to the EducationUSA Iran center, interest in undergraduate programs in the United States has increased, and 23 percent of inquiries submitted to the center are about undergraduate study options. Over the past year, EducationUSA has seen a record number of Iranian students submit online advising forms and participate in online chats, virtual office hours, and Instagram story campaigns. 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. Although F, M, and J visas are still granted to Iranian nationals, student visa numbers dropped in AY 2017-2018, and numbers are expected to continue to decline over the coming years.

- EducationUSA advisers for Libya, Syria, and Yemen continue to work virtually, assisting students through Skype, social media, and other online communication tools. 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

Regional Student Totals Top Five Countries of Origin

Country	2017/18	% Change 2016/17
Saudi Arabia	44,432	-15.5%
Iran	12,783	1.1%
Kuwait	10,190	3.7%
Egypt	3,701	-0.4%
Oman	3,097	7.7%

Middle East and North Africa

million active users. YouTube is widely used by students to view videos posted by colleges and universities. Even in countries where the site is blocked, students are often able to access it through proxy servers. SnapChat, WhatsApp, and Instagram also have a large following in MENA.

- 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 2.7 million people access social media through mobile devices, which is about 99 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 launched a mobile application in fall 2019 designed 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, 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 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. In March 2019, the EducationUSA MENA Regional Forum was held in Casablanca, Morocco. More than 50 U.S. HEI and testing/association representatives attended the three-day conference, which included a student fair welcoming more than 1,000 visitors. Following the Forum, the first ever EducationUSA student fair in Northern Morocco was held in Tangier with 20 universities represented and more than 800 attendees.

U.S. Study Abroad

Top Five Receiving Countries in the Region

Destination	2016/17	% Change
Israel	2,999	23.2%
Morocco	1,770	26.2%
United Arab Emirates	865	20.5%
Jordan	735	-24.1%
Egypt	174	40.3%

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

Country	2012/13	2016/17	% Change
Oman	33	102	209.1%
Morocco	1,182	1,770	49.7%
United Arab Emirates	696	865	24.3%
Qatar	88	108	22.7%
Israel	2,798	2,999	7.2%

Foreign Government and Private Funding

Bahrain, Egypt, Iraq, Kuwait, Oman, Qatar, Saudi Arabia, and 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 (e.g., 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 10,190 students in 2017-2018, Kuwait is now the 16th 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, 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 come from a public school background. EducationUSA anticipates growth in graduate studies and particularly advanced degrees in STEM education. Some recent challenges around English language learning can provide opportunities for colleges and universities to have potential impact. In 2018-2019 the Ministry of Higher Education issued a new regulation requiring all students who receive government scholarships to obtain a score of five or higher on the IELTS before traveling abroad for study. Students have up to a year to

increase their score, or the scholarship will be cancelled. This requirement may discourage some public schools students from studying in the United States as a result of low English proficiency because they would have to spend a year in Kuwait studying English to get the required IELTS score, and then study an additional year of English in the United States before starting their academic major. In addition, the increased enforcement of anti-cheating rules in public high schools resulted in a percentage drop of passing seniors, leading to an overall drop in applicants to the government scholarship program.

Qatar. Students on scholarship, according to the 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 number one challenge for Qataris traveling to the United States to pursue their studies is 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

Middle East and North Africa



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. Increasing job placement after graduation and fulfilling labor market needs as "Saudization", officially known as Saudi nationalization scheme, continues to remain a top priority. 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. The Ministry recently introduced a new "Elite University Project", which grants automatic scholarships to Saudi students who gain admission to one of

the world's "Top 20" global universities as defined by the Ministry, which includes 14 U.S. institutions. The United States remains the most popular destination for Saudis studying abroad. Students who value a U.S. degree are seeking government and private scholarships, but those who have the financial means are self-funding their education abroad.

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. MENA REACs send out a MENA HEI Newsletter six times per year to all who register. More detailed information about events happening in the region and recent trends can be found there. 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 universities. 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. Additional updates are available through the bi-monthly MENA HEI newsletter as well as monthly Country Spotlight Webinars.

Fairs and Conferences

UAE. NAJAH, the official government-sponsored education expo attracting more than 11,500 visitors, will takeplace October 31-November 1, 2019 in Abu Dhabi (www.najahonline.com/en/visit.html).

Oman. EDUTREX, with the Sultanate of Oman MOHE, takes place August 2019, in Salalah, Oman (www.edutrex.com).

Egypt. The AMIDEAST Egypt StudyUSA Fair will be in Cairo and Alexandria, October 11-12, 2019.

Qatar. The only university expo in Qatar will be held in Doha, October 16-17, 2019 (<https://www.universityexpoqatar.com/>).

Iraq. The Baghdad International Fair is held by the government annually and usually takes place in October.

Bahrain. EDUTEX Bahrain Education and Training Exhibition will be at the Bahrain International Exhibition and Convention Center in March 2020 (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 2021 in Riyadh, Saudi Arabia (www.ieche.com.sa/en).

Oman. Global Higher Education Exhibition, Oman's largest higher education expo will be in October 2019 and April 2021 (www.ghedex.om).

Kuwait. How Do I Plan My Future? will take place in Kuwait City, Kuwait, March 2019.

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.

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

Bahrain, Kuwait, Oman, Saudi Arabia, and UAE. The best time to visit is from October to February. Avoid traveling during Ramadan and the Eid holidays. Note that there are many different international school calendars as a result of the large expat community. Take into consideration the Indian school timetable as well as exam preparation times.

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).

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.

Iran, Iraq, Libya, Syria, and Yemen. Travel is not advised (at the time of publication), and virtual interaction is recommended. Consult <https://travel.state.gov/content/travel/en/traveladvisories/traveladvisories.html/>.

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

The 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.

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

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 2016-2017. For the first time in many years, the region saw an increase of 14.2 percent over the previous year, with numbers increasing in Lebanon (93.1 percent), Egypt (40.3 percent), Morocco (26.2 percent), and Saudi Arabia (25 percent). 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 United States 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, some centers 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.

South and Central Asia

Regional EducationUSA Profile

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

33

EducationUSA Advising Centers in the Region

19 Comprehensive
10 Standard
4 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 78 advisers at 33 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. higher education institution (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. Students 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 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 and certain applications and services affect 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. Students from Central Asia, will often consider studying in Russia and formerly Russian countries as a result of the close ties to the Russian language and culture as former countries of the Soviet Union. Increased higher education opportunities in Kazakhstan and Kyrgyzstan are becoming attractive to students who want to stay closer to home.

South and Central Asia

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, 21.2 percent of the total international student population originates from SCA. In AY 2017-2018, *Open Doors* reports a 5.8-percent increase in mobility from this region from 218,937 students the previous year to 231,661.

- The majority, 47.7 percent, of the total student population from SCA are in graduate programs, and 34.4 percent are enrolled in Optional Practical Training (OPT). Undergraduate students make up only 16.7 percent of total students from SCA.
- Nepal (+14.3 percent), Pakistan (+7.4 percent), India (+5.4 percent), and Bangladesh (+4.9 percent) saw the fastest growth in the region for AY 2017-2018.
- India, Nepal, and Pakistan are among the top 25 countries in the world

sending undergraduate students to the United States in AY 2017-2018, according to the *Open Doors* report. India and Nepal are in 2nd and 10th place, respectively, with Pakistan joining them at 20th. Other notable increases in undergraduate mobility from the region include Kyrgyzstan (+22.6 percent), Tajikistan (+6.9 percent), Turkmenistan (+6.7 percent), and Uzbekistan (+6.3 percent).

- India, Bangladesh, Nepal, Pakistan, and Sri Lanka were also among the top 25 countries in the world sending graduate (Master's and Doctoral) students to the United States in AY 2017-2018, according to the *Open Doors* report. Other increases in graduate mobility within SCA include Maldives (+42.9 percent), Uzbekistan (+27.7 percent), Bhutan (+13.6 percent), Tajikistan (+10 percent), and Sri Lanka (+7.3 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.

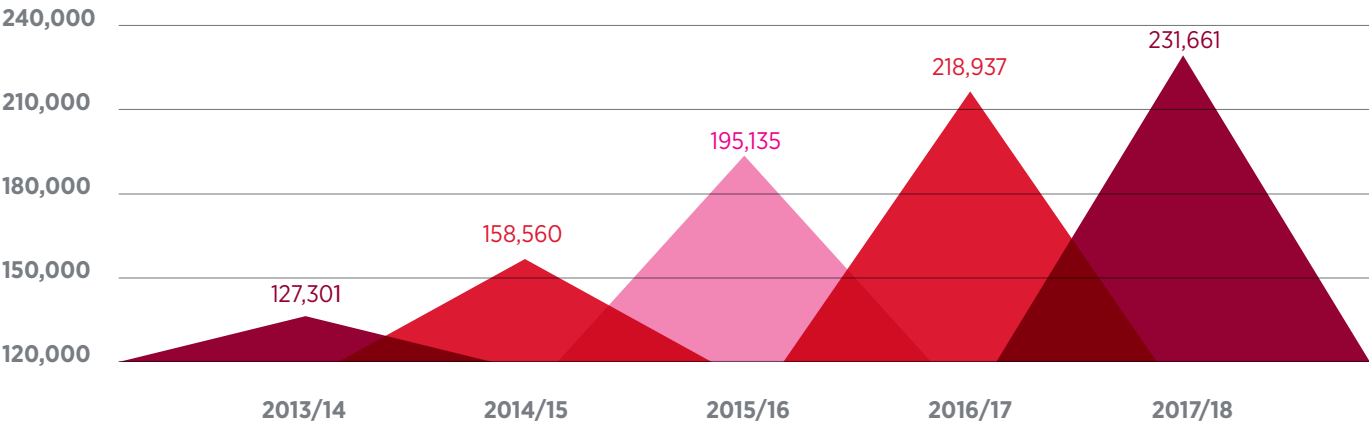
In some countries, private English-medium secondary schools are focused on preparing students for undergraduate study abroad. Although such schools hesitate to sacrifice class hours to accommodate visiting college and university representatives, EducationUSA advisers may be able to assist institutional 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 acknowledge 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/ACT.

Countries in the Spotlight
Bangladesh. Bangladesh has a long tradition of English language education, a booming education sector, and a rising

Student Mobility in the Region (Five-Year Trend)





middle class, all of which combine to make Bangladesh a prime target for student recruitment. Gross domestic product growth averages more than 6.0 percent per year. UNESCO reports more than 55,000 students studying abroad from Bangladesh, with the highest numbers in Malaysia, followed by the United States, Australia, United Kingdom, and Canada. The *Open Doors* survey reports a steady flow of Bangladeshi students studying in the United States, with an increase of 4.9 percent for AY 2017–2018. Graduate students (Master's degree/Ph.D.) make up 62 percent of Bangladeshi students in the United States. The highest growth, an increase of more than 12.4 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. Sectors of the population 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. There is 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

South and Central Asia

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 CPT and OPT) are important factors in students' decision-making. Student profiles and their fields of interest vary from region to region within India.

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 increased by about 4.0 percent in AY 2017–2018. Although undergraduate numbers decreased by 3.0 percent, graduate student numbers increased by 16.5 percent and OPT by 12 percent. The government of Kazakhstan has undertaken a number of steps to reform the educational system beginning in the first grade and extending to university reform; these reforms include the goal of creating a trilingual country by 2050. As a result, last year sciences were expected to be taught in English in all schools across the country. Education is highly valued in Kazakhstan and students continue to have a strong interest in university study in the United States. The country has 10 international schools with sizable expat representation: close to 100% of the senior year students seek an education overseas.

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

Kazakh students seek to study abroad. Kazakhstan is a landlocked country with a population of more than 18.5 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 has more than 66,000 students studying abroad but less than 3.0 percent choose to study in the United States.

Graduates of intellectual schools and other selective schools seek an education abroad. A number of undergraduate institutions, including English-medium Nazarbayev University, offer strong STEM and other programs with graduates seeking graduate study abroad.

Pakistan. In AY 2017–2018, there was a 7.4-percent increase over the previous year of Pakistani students (7,537) studying in the United States, according to *Open Doors*. The increase was split among undergraduate (9.8 percent), graduate (2.1 percent), and OPT (27 percent) with a decrease in non-degree programs (-20.3 percent). 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

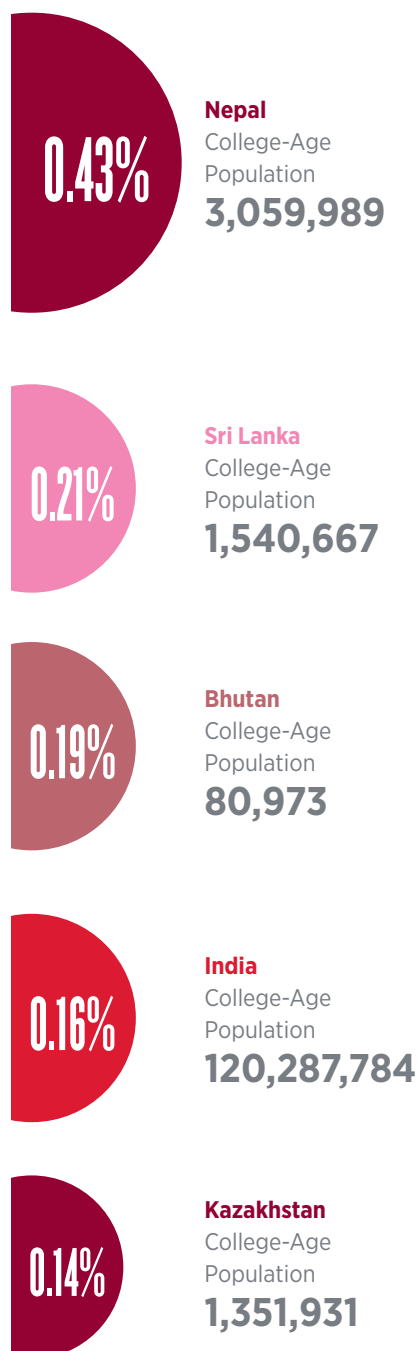
Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students in the Region (Five-Year Trend)

Country	2013/14	2017/18	%Change
India	102,673	196,271	91.2%
Nepal	8,155	13,270	62.7%
Bangladesh	4,802	7,496	56.1%
Pakistan	4,935	7,537	52.7%
Uzbekistan	463	570	23.1%

91.2%

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: 2016 Population of the official age for tertiary education, both sexes

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.

Uzbekistan. Uzbekistan is Central Asia's most populous country with more than 30 million people; more than 64 percent of the population are 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 deeply affected the country's basic social service delivery mechanisms and 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

Regional Student Totals Top Five Countries of Origin

Country	2017/18	% Change 2016/17
India	196,271	5.4%
Nepal	13,270	14.3%
Pakistan	7,537	7.4%
Bangladesh	7,496	4.9%
Sri Lanka	3,309	1.4%

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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.

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 social media platforms throughout the region and are

among the strongest ways to promote study abroad programs, scholarships, and EducationUSA center events. Telegram is also popular in Central Asia.

- 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 in Pakistan, finally became available to Pakistanis in 2015 and is quite popular. 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 SCA 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 REAC Ishrat Jahan (ijahan@educationusa.org) to facilitate meetings with the Ministry of Education (www.education.gov.bt).

Kazakhstan. Since 2011, the government's Bolashak scholarship program has funded professional

U.S. Study Abroad

Top Five Receiving Countries in the Region

Destination	2016/17	% Change
India	4,704	12.5%
Nepal	581	57.0%
Sri Lanka	157	8.3%
Kazakhstan	76	35.7%
Bhutan	74	-35.1%

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

Country	2012/13	2016/17	% Change
Kazakhstan	17	76	347.1%
Bhutan	26	74	184.6%
Sri Lanka	87	157	80.5%
Nepal	383	581	51.7%
India	4,377	4,704	7.5%

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, although please note Department of State travel warning.

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 exam 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.

development and technical skills development to address a shortage of specialists in fields related to economic development. The Bolashak scholarship program funds graduate study at leading institutions abroad in priority fields identified by the state. In AY 2017-2018, there were 375 students funded by the Bolashak program studying in the United States. 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; 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 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. U.S. and Uzbekistan relations have improved since 2016 when President Shavkat Mirziyoyev came to power. The American Councils for International Education reopened its doors in August 2018, after being closed since 2006. They

are the first NGO to receive accreditation in the past 15 years. Such partnerships can lead to institutional collaboration, teacher and faculty development, and research.

Regional EducationUSA Events

Use the EducationUSA website to find country-specific information about upcoming fairs, webinars, and other events and activities. REACs host workshops and trainings in the region, both virtual and in-person. Connect with the REACs to learn how you can participate and lend support in trainings.

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 <https://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 the EducationUSA adviser at iiqbal@educationusa.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.

Central Asia Tour. Join the tour through Kyrgyzstan, Kazakhstan, Uzbekistan, and Turkmenistan. The Central Asia tour includes college and university fairs, secondary school visits, cultural activities, and visits to local universities. This is the first year the tour is going to Uzbekistan and Turkmenistan. Many advising centers in this region have strong cohort advising groups looking for opportunities at the undergraduate level.

The tour takes place in the fall each year, traveling through multiple cities including Astana, Atyrau, Almaty, Bishkek, Osh and Tashkent. Last year, 24 U.S. institutions participated and met with over 2,500 students. Dates for 2019 are October 11-14 Kyrgyzstan, October 15-18 Uzbekistan, October 19-26 Kazakhstan, and October 27-29 Turkmenistan. For details, email advising centers directly and check the EducationUSA website for registration link.

India. The EducationUSA tour in India is hosted in partnership with EducationUSA host institutions. The annual fall tour travels through as many as twelve cities. EducationUSA India hosts "Chalo America", small group tours in the spring across different cities. EducationUSA India also hosts alumni fairs in December/January. EducationUSA India partners with Yocket to host separate undergraduate and graduate virtual fairs in the fall. For details about these events, please write to IndiaFairs@educationusa.org.

Kazakhstan/Uzbekistan. 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.

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 with the South Asia Tour. The fall fair is scheduled for September/October 2019. In spring 2019, 42 U.S. universities attended. For information, contact EducationUSA Pakistan at advising@usefpakistan.org.

South Asia Tour. Join the tour through Bangladesh, 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 multiple cities. For details, email SouthAsiaTour@educationusa.org.

Turkmenistan. In Ashgabat in November, the government sponsors an annual international exhibition and scientific conference titled *Education, Sport, and Tourism in the Era of Power and Happiness*. EducationUSA will be attending the GOTX Education Fair October 2019 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.

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 an increase of 14 percent in the number of U.S. study abroad students in AY 2016-2017 compared with the previous year, with 5,678 U.S. 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 4,700 American students in AY 2016-2017, followed by Nepal with 581 students (+57 percent). For AY 2016-2017, Kazakhstan 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

148

EducationUSA Advising Centers in the Region

81 Comprehensive
54 Standard
13 Reference



The Western Hemisphere (WHA) has 148 EducationUSA centers:

- 21 comprehensive, 12 standard, and one reference center in the Andean sub-region
- 35 comprehensive, 13 standard, and seven reference centers in the North America, Central America, and Caribbean sub-region
- 25 comprehensive, 29 standard, and five 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. Eight new centers opened within the past year in Brazil (Florianopolis, Juiz de Fora, Porto Alegre, and Rio Branco-Acre) and Mexico (Guadalajara, Hermosillo, Pachuca, and Tlaxcala). The region has 158 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 English 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 and commercial fairs organized by private organizations to promote exchange opportunities in the United States. EducationUSA advisers host information sessions at these fairs 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

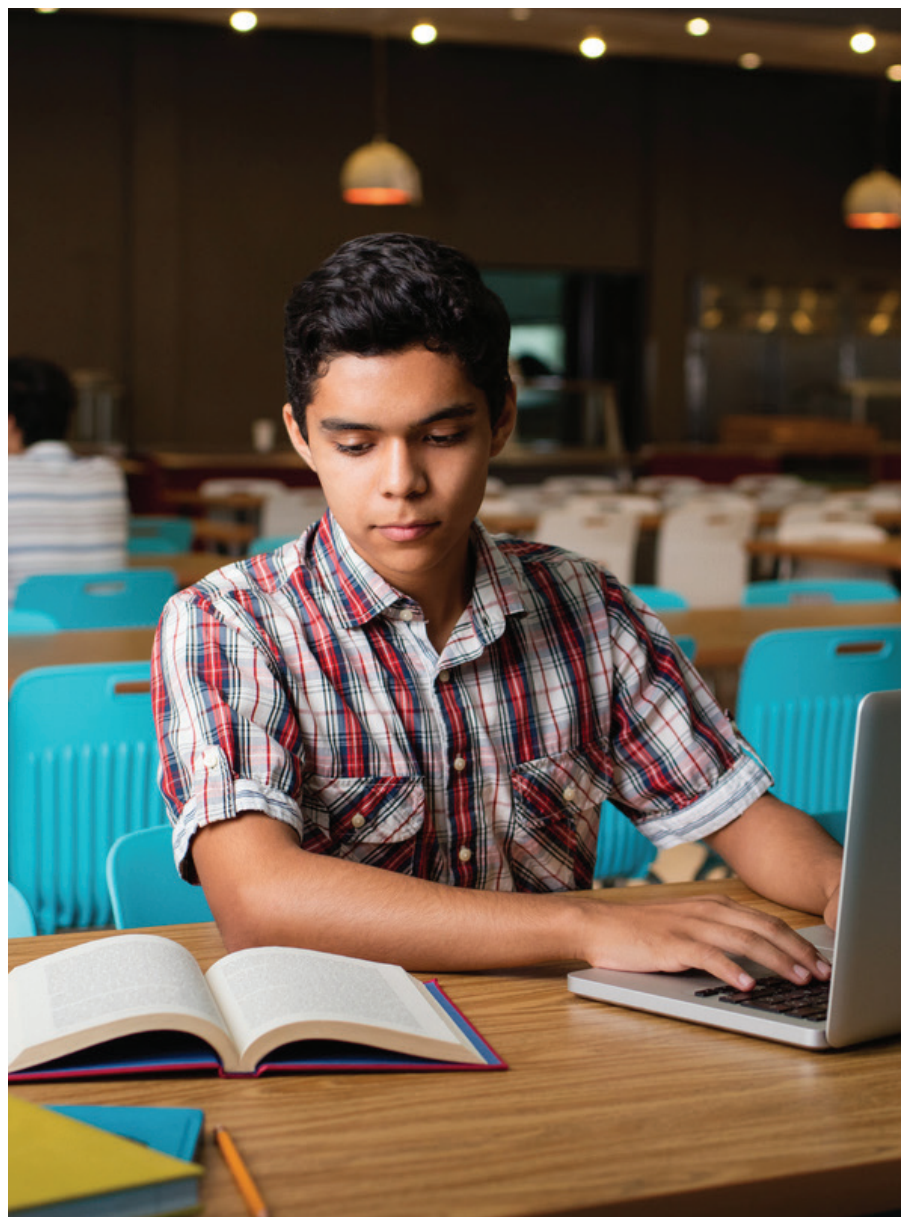
to connect U.S. college and university representatives with local students, parents, and counselors to inform them about U.S. higher education opportunities and explain the application process. U.S. embassies and U.S. HEIs co-host EducationUSA webinars and viewing parties for virtual events such as EducationUSA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

Advisers use virtual advising to target non-traditional audiences in remote locations such as 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.

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 ETAs, Peace Corps Volunteers, Gilman Scholars, and other 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, and Uruguay. During the past year, 126 students from across the WHA region were enrolled in the Opportunity Funds program.

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 105,829 students in the United States

during the academic year (AY) 2017-2018, 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, WHA represents 9.7 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

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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 2018 for academic programs in the United States were in business and entrepreneurship; science, technology, engineering, and mathematics (STEM) fields; and social sciences.

Though WHA seems to be a cohesive region, its languages, cultures, and

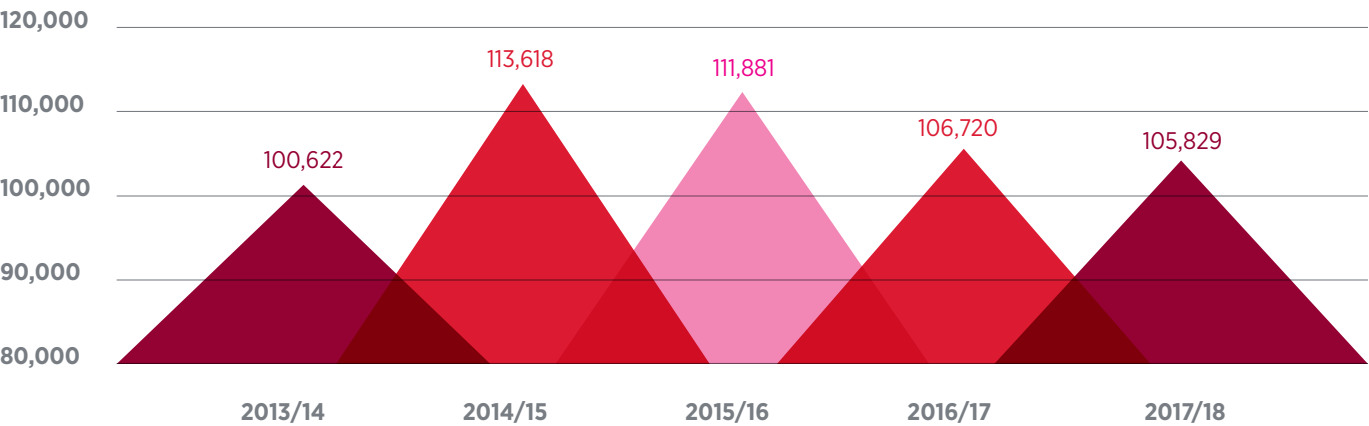
educational systems vary by sub-region. Educational systems follow the British, French, Spanish, Portuguese, and Dutch models in combination with regionally developed credentialing models aimed at achieving standardization in the sub-regions. Academic calendars vary across the region, some of which make 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

Student Mobility in the Region (Five-Year Trend)



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, Rio de Janeiro, and Sao Paulo are the major hubs. 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

- EducationUSA advisers continue to address 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 continue to use 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 impact mobility to the United States. Economic recessions may force some young professionals to delay graduate studies or look for more affordable options. However, 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 increases in mobility to the United States.
- 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.

Many universities and research centers throughout WHA continue to 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 NAFA—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, and as of June 2019, the Innovation Fund has awarded 211 grants to 385 teams of higher education institutions in 25 countries and 43 U.S. states. As a result, more than 1,860 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 and other educational institutions to create partnerships using these grants to increase student mobility. To stay informed about *100,000 Strong in the Americas* Innovation Fund grant competitions, workshops, and special events, please visit www.100kStrongAmericas.org.

- 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 Brazil, a new high schools initiative is offering dual Brazilian-U.S. high school diplomas. Several universities and companies such as Texas Tech, University of Missouri, Griggs Academy, K-12, and more recently Pearson with their U.S. home schooling platform are partnering with high schools in Brazil to offer required courses in English language, leading to a U.S. high school diploma. Such dual-diploma programs have significantly increased the number of prospective students interested in applying to undergraduate programs in the United States and have created a new pool of students for U.S. HEIs to engage.
- Central American countries continue to

Western Hemisphere

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.

- Throughout WHA, there is increased interest in short-term and summer programs as well as pre-professional experiences including internships in the United States.

Countries in the Spotlight

Brazil. According to UNESCO, the United States continues to be the leading destination for Brazilians. Brazil ranks 10th in the world in sending students to the United States, according to the latest *Open Doors* statistics. There are 38 EducationUSA offices in Brazil, with a total of 48 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. Fulbright ETAs and U.S. Foreign Service officers volunteer to mentor EducationUSA students both in-person and during fairs. EducationUSA Brazil organizes general fairs and fairs that target specific fields of study, such as the Master of Laws (LLM) fair circuit. Brazil's GDP has remained steady in 2017 and 2018 with a 1.1- percent increase, and exports grew by double digits at the end of 2018. For 2020, 2.4-percent economic growth is predicted. The newly elected government is seeking

partnerships with the United States at all levels, and some U.S. HEIs that were in the process of signing specific STEM agreements with the last government were able to conclude the agreements under the new government. Although the new educational partnership policies are yet to be established, the U.S. mission in Brazil has met with the new minister of science and technology (a former Brazilian NASA astronaut) and the new minister of education to discuss strengthening educational partnerships with the United States.

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. In the newly revised Brazilian national curriculum, English is the only obligatory foreign language for middle and secondary students, and the demand for English remains high. 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' desires to better prepare their children to succeed in an increasingly globalized society and to show positive international admissions results to highlight local schools among their competitors. During the past two years, more schools have begun offering dual Brazilian-U.S. high school diplomas. The majority of Brazilian students who receive these diplomas plan to pursue a college degree in the

United States, and EducationUSA advisers have been targeting outreach visits together with U.S. HEI representatives. EducationUSA Brazil devised a cohort outreach program, visiting targeted groups of students at least four times to provide them with information on the *Your 5 Steps to U.S. Study*.

Many Brazilian universities are establishing partnerships to introduce U.S. educational models, such as the one between Pontifical Catholic University Parana and Kent State University, which launched 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* 2018), 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

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

Country	2013/14	2017/18	%Change
Cuba	69	152	120.3%
Dominica	191	371	94.2%
Curaçao	76	128	68.4%
El Salvador	1,233	1,554	26.0%
Uruguay	353	444	25.8%

120.3%

Cuba 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

7.39%

Bermuda
College-Age
Population
4,004

6.55%

Bahamas
College-Age
Population
33,212

5.40%

Dominica
College-Age
Population
6,868

3.48%

British Virgin Islands
College-Age
Population
2,011

2.36%

Antigua and Barbuda
College-Age
Population
8,479

Source: UNESCO Institute of Statistics; Indicator: 2016 Population of the official age for tertiary education, both sexes



to study across the border. Based on historically low study abroad patterns (only 11 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. However, recent studies show industries' concerns about Canada's global competitiveness, especially in terms of new emerging economies, as a result of young Canadian and Canadian-trained students' perceived lack of global perspective. Provincial governments and ministries have resources available for training and capacity building to strengthen priority economic sectors. However, Canada lacks a national strategy to support academic experiences abroad, which would include

a framework for outbound student mobility and funding commitments from federal and state governments, as well as foreign government counterparts and the private sector. As Canadian HEIs are generally less expensive than those in the United States, most students considering U.S. studies are seeking articulation agreements that include discounts in tuition and scholarships. With these issues in mind, Canadian

Regional Student Totals Top Five Countries of Origin

Country	2017/18	% Change 2016/17
Canada	25,909	-4.3%
Mexico	15,468	-8.1%
Brazil	14,620	11.7%
Venezuela	8,371	-2.0%
Colombia	7,976	-0.1%

Western Hemisphere

HEIs continue to expand their internationalization efforts, mainly focusing on partnerships and sustainable pathways to promote short-term exchanges for their students as well as strengthening their educational institutions' connections to global research networks and resources. This is particularly important because the federal government has reduced its research budget by 30 percent in recent years. Consortia and associations, such as the Ontario Academic Exchanges working group, are involved in internationalization efforts.

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.

Colombia. Colombia continues to rank 22 out of the top 25 sending countries of international students to the United States. According to UNESCO, the United States continues to be the most desired destination for Colombians pursuing studies abroad. The percentages of Colombians pursuing U.S. undergraduate and graduate studies are fairly equal.

The new government assumed power in August 2018, and it is still in the process of laying out changes in policies related to higher education and student mobility. The government continues to be committed to the *100,000 Strong in the Americas* initiative, with *Colciencias* (Colombian government's Science, Technology, and Innovation Branch) funding a new round of grants through the Innovation Fund to support projects related to President Duke's Orange Economy initiative. This initiative focuses on innovation in Colombia's creative and cultural industries (<https://www.investincolombia.com.co/news/943-what-is-the-orange-economy.html>). In late 2018, Colombia was shaken by a series of nationwide student protests that forced the newly elected government to redirect more funds to local public universities to address deficiencies. It is expected

that the president will develop additional policies related to higher education opportunities as his term progresses.

EducationUSA has 11 centers throughout Colombia, making it easier for U.S. universities to recruit students from various parts of the country (not only in 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.

The USAlumni Network was created in 2016 as an initiative of the U.S. embassy in Bogota and a group of engaged alumni of U.S. universities. The Network is an alumni association of more than 1,000 members representing more than 150 U.S. institutions, passionate about their alma maters. They serve as unofficial ambassadors for study in the United States, and are committed to ensuring that more Colombians can also have rewarding academic experiences in the United States. U.S. institutions are encouraged to take advantage of this existing network of alumni to serve as in-country representatives for recruitment events or presentations.

Mexico. As reported in the 2018 *Open Doors* report, more than 16,000 Mexicans chose the United States as their study destination in AY 2017-2018. These students mainly pursued studies in business administration, 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, English as a Second Language programs, research opportunities, and internships.

Economic growth continues to be stable, particularly in sectors such as export-oriented automotive and aerospace manufacturing, mining and metallurgy, petroleum extraction, services, and tourism. Along with economic stability, the former administration in Mexico prioritized development in STEM innovation and entrepreneurship. As the new administration transitions and outlines new national priorities,

academia and the private sector are focused on partnerships with U.S. higher education counterparts to build capacity and strengthen human capital. These initiatives are especially important considering the recent announcement that the government plans to change the previous educational reform, which would directly affect the quality of higher education in Mexico by eliminating evaluation systems for the hiring and promotion of faculty and students.

Mexican HEIs continue to set internationalization goals for their campuses. Resources are available to build capacity for Mexican institutions to host more U.S. students and to send Mexican students abroad. These initiatives include ECA-funded U.S. study abroad capacity-building workshops, ECA-funded International Visitor Leadership Program, U.S. associations' international leaders programs, private sector-funded visits of Mexican university presidential delegations to U.S. institutions, public and private cost-share opportunities for mobility programs, and the establishment of Mexican state consortia in education hub states such as Jalisco and Puebla. All of these investments demonstrate the high value that academia and the private sector place on U.S. education.

EducationUSA Mexico has 26 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.

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 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.

- 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 country in the *100,000 Strong in the Americas* Innovation Fund initiative in terms of the number of participating institutions, from both the local government and the private sector. 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 Salvadoran American Scholarship Program 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 based there are creating new opportunities for collaboration between non-governmental organizations (NGOs), the private sector, and academia in support of non-traditional exchanges and virtual education.
- The U.S. government continues to support *Caribbean 2020*, a U.S. interagency strategy for engagement in the Caribbean. Education is one of six priority areas outlined in the strategy, focusing on support for public-private partnerships that facilitate higher education and workforce development in the United States and the Caribbean. *Caribbean 2020* also focuses efforts on 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 programs and virtual tools to teachers, policymakers, and civil society.

South America: Andean

- Political and economic changes in the region are driving student mobility and will continue to do so over the next couple of years. Governments continue to see international education as a policy priority. However, difficult economic environments and political instability have forced governments to focus on immediate needs in the education sector. For the near future, policymakers in the region will focus on strengthening local institutions and offering high-quality local opportunities for students.
- Bolivia's steady economic growth in the past 10 years, combined with a decrease in poverty, has resulted in a dramatic increase in the size and spending power of the middle class, making it a great country from which

to recruit students. Though Bolivia will face a contentious presidential election in the fall 2019, it is likely that its strong middle class will continue to prosper. Similar to its neighboring countries, the upcoming elections and any related political unrest might drive more families to decide to send their children to study abroad. Though EducationUSA conducts extensive outreach around the country, the local population outside of the two largest cities of La Paz and Santa Cruz still seem to lack an understanding about the benefits of a U.S. higher education, especially compared with other study destinations. The best way to help families make the decision to send their students to study in the United States is for U.S. higher education representatives to visit the country and meet directly with students.

- Colombians choose the United States as their top study destination; however, the continued devaluation of the peso is a challenge. Should the Colombian

U.S. Study Abroad

Top Five Receiving Countries in the Region

Destination	2016/17	% Change
Costa Rica	8,322	-9.9%
Mexico	5,736	10.8%
Cuba	4,607	21.8%
Ecuador	4,021	7.2%
Peru	3,695	5.2%

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

Country	2013/14	2017/18	% Change
Grenada	42	128	204.8%
Cuba	1,633	4,607	182.1%
Colombia	340	911	167.9%
Paraguay	40	102	155.0%
Mexico	3,730	5,736	53.8%

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economy continue to face challenges during the next couple of years, Colombians will look for the most affordable options to study abroad. Community colleges are becoming a viable and interesting option for students. EducationUSA is focusing on explaining to local students the economic and academic benefits these institutions offer.

- Ecuador's economic recession continues to intensify. The current government is mainly focusing its initiatives on improving primary education. Although the government supports internationalization efforts of HEIs and student mobility, there are currently no formal government initiatives that support these goals. At an institutional level, Ecuadorian universities have created the *Red Ecuatoriana para la Internacionalización de la Educación Superior* network (REIES, www.reies.edu.ec/) for the internationalization of higher education, which focuses on supporting internationalization efforts of its

members and promoting Ecuador as a study destination.

- There are predictions that Peru's economy may start to decelerate. Even with this forecast, Peruvians will likely continue to study abroad. The United States is a popular study destination, but opportunities that other countries offer, especially in the form of scholarships, may influence Peruvians to study in other locations. Current government initiatives to improve local education opportunities will yield a better prepared generation of students to study in the United States, with a stronger academic foundation and better English skills. Such initiatives include the evaluation of local universities, English initiatives such as the *Inglés Puertas al Mundo* (English, Doors to the World) program, and the funding of elite, public boarding schools with IB curriculum throughout the country.
- Though the United States continues to be the number one study destination for Venezuelans, the humanitarian crisis in this country has changed the patterns

of student mobility in the region, with Venezuelan students choosing other neighboring countries for study, as they are more affordable and easier to access. Regardless of the current situation in Venezuela, this pattern in student mobility will likely continue during the next few years. However, Venezuelans who actively seek opportunities to study in the United States depend on funding from extended family living abroad. Venezuelans currently living outside of Venezuela will continue to seek opportunities to study in the United States. These students face hurdles to apply to U.S. institutions from a third country, such as visa applications and difficulty accessing transcripts. EducationUSA advocates for and supports these displaced students.

South America: Southern Cone

- For Brazil, the new government is yet establishing its new educational policies, but given the choice of the new Minister of Science and Technology, STEM will remain an important focus for outreach with the Brazilian government over the

next year and beyond. The newly elected president has declared that the United States is an important partner for this new government, particularly in the area of education. The new middle and secondary educational reform with English as the only mandatory foreign language will increase the demand of learners, and short-term courses are already on the rise. University students in Brazil are looking for international experience even though their universities may not have agreements with U.S. HEIs, so summer and non-degree courses that allow students to spend vacation or one semester abroad are popular options. Undergraduate recruitment is also in demand, as the proliferation of dual high school diplomas (Brazilian and U.S. high schools) is spreading in the main cities in Brazil.

- Argentina is the third largest destination in South America in terms of receiving U.S. students. This is 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 until 2019, 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 at the graduate level.
- In December 2018, Chile inaugurated the Ministry of Science, Technology, Knowledge and Innovation, with the mission of connecting and organizing the multiple funds, programs, and councils focused on science and innovation. CONICYT, which manages the Becas Chile Scholarship program, and CORFO, a governmental organization that promotes economic growth in Chile, are two institutions that will now be managed by the new Ministry of Science and Technology. Expect to see a focus on STEM education. Also, in 2018, after many years of discussion, the Chilean congress approved the higher education bill, which guarantees fee education, creates a higher education superintendent, and regulates the accreditation of HEIs and tuition. At present, the poorest 60 percent of

students study for free. This benefit will be extended as the GDP permits. In previous years, laws were also passed on K-12 education as well as the teaching profession. These laws may be modified before being implemented as a result of the new government, which assumed power in March 2018.

- The Ministry of Education in Paraguay has launched a program targeting students in language classes (English, German, French, and Portuguese). Through Becas Carlos Antonio Lopez, 750 scholarships will be given to undergraduate students in pre-established organizations (such as Paraguay's bi-national center, which hosts the EducationUSA advising center), to build capacity for these students to apply for graduate studies abroad. Students may renew scholarships for as many as two years. Look for more students from Paraguay applying to graduate programs in the United States through these Paraguayan foreign government graduate scholarships.
- The government of Uruguay has incorporated English and technology into the public curriculum at all levels. With government organizations created in the past 10 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. An incredible 75 percent of Uruguayan university students speak English. Uruguayan universities are looking to expand their connections to U.S. universities, especially in fields of engineering, international relations, and law. Universities are interested in increasing study exchanges, dual credit courses, and joint degree programs.

Virtual and Social Media Usage

With at least one EducationUSA Facebook 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, 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 and share content on social media.
- 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. Launching the *First Wednesdays on Facebook Live* initiative in spring 2018, EducationUSA Canada regularly provides information on the *Your 5 Steps to U.S. Study* to a large audience. Also, the virtual essay writing boot camp is now offered every summer. This four-session program helps participants finish their personal statements for submission with college applications in the fall.
- EducationUSA Brazil and Chile have 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 four times to meet with a small cohort of students. Advisers have created campaigns with themes such as Black History Month and Women's Empowerment, as well as highlighting U.S. universities that famous Oscar-winning actors and actresses have attended.

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- EducationUSA in La Paz, Bolivia has integrated virtual advising services for the neighboring city of El Alto, with a population of approximately one million inhabitants. The demand for services in El Alto has increased in the past year, and EducationUSA provides regular services using virtual channels.
- 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 in studying in the United States. EducationUSA 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.

Foreign Government and Private Funding

Argentina. In 2018, the Ministry of Education's Department of International Scholarships and International Cooperation funded 1,025 scholarships to the United States, including 50 Master's degree students and Ph.D. candidates, 100 research grants, 280 Friends of Fulbright participants, and 100 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 (<http://bec.ar/>), scholarships for

Master's program and research grants in STEM fields. The City of Buenos Aires Magistrates' Council awards 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 16 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 Examination (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 10 scholarships each year in various disciplines to people between the ages of 18 and 40 who have already been accepted to an internationally accredited university at the undergraduate or postgraduate level.

Bolivia. In 2014, the Bolivian government launched a scholarship program called *Soberanía* for graduate studies at top international universities. Eligible fields of study for this scholarship, in addition to STEM fields, include medicine and law. The scholarship covers all costs. One challenge for students interested in studying in the United States is that the scholarship award dates are not synced with the deadlines for accepting admissions offers from U.S. universities. EducationUSA currently

has a cohort advising program to help students that are applying to U.S. institutions and the Bolivian government scholarship (https://www.minedu.gob.bo/index.php?option=com_content&view=article&id=995&Itemid=886).

Brazil. The Brazilian government selected 36 local universities through a competitive process for the *International CAPES PrInt Programme*, an initiative that funds internationalization projects between Brazilian universities and their partner universities overseas. The recently established new Brazilian administration will be setting up new policies for funding in the near future, possibly focusing on STEM fields. 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). The *Mitacs Globalink Research Award* provides USD\$6,000 for senior undergraduate and graduate students and postdoctoral fellows in Canada to conduct 12-to-24-week research projects at universities overseas (www.mitacs.ca/en/programs/globalink/globalink-research-award).

Chile. *Becas Chile* is a government scholarship administered by CONICYT, which as of December 2018 falls under the umbrella of the Ministry of Science, Technology, Knowledge, and Innovation. Since 2008, more than 9,600 scholarships have been awarded to Chilean students and residents at the graduate and doctoral levels to study abroad. Approximately 20 percent of awardees pursued their studies in the United States, placing the United States as the second top destination, with the United Kingdom serving as the leading destination and Spain as the third choice. *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 (www.becaschile.cl/).

Colombia. The foundation COLFUTURO (www.colfuturo.org) offers scholarship-loan opportunities to qualified Colombian graduate students to study abroad. The new Colombian government is currently evaluating its government scholarship initiatives. There will likely be new developments as the year progresses. 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 in STEM fields, including the Opportunity Funds program. Through its partnership with the *BNC Centro Cultural Costarricense Norteamericano* and its EducationUSA center to support technical and vocational education through community colleges, CRUSA will support approximately 30 Costa Ricans, awarding USD\$40,000 on average, per student, for two years by 2022 (<https://crusa.cr/capital-humano-conocimiento-e-innovacion-becastecnicos/>).

Dominica. The government of Dominica awards one *Island Scholarship* each year to the student who has earned the highest score on CAPE. In addition, the 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 (<https://mescyt.gob.do/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 currently has very few scholarships to study abroad. There is no information about upcoming calls for the graduate-level scholarship program. Currently, the only program available is for a very small group of high-achieving students from economically disadvantaged public high schools, part of the government program *Grupo de Alto Rendimiento*.

Fundación Capacitar is an NGO that offers a combination of grants and loans to help cover the living expenses of current/future Ecuadorian university professors pursuing graduate degrees abroad. The financial support from *Capacitar* can be used towards graduate studies, and the amount provided varies depending on the applicant's financial situation (www.fundacioncapacitar.org/requisitos.php).

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 Guatemala, and 3) remain in the country for three to five years. Students can 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 2018, approximately 400 Honduran students

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received awards to cover airfare, lodging and maintenance, tuition and fees, medical insurance, and materials. Priority fields of study for this program are tourism, housing, textiles, agriculture, manufacturing, and business support services.

HonduFuturo offers loans of up to USD\$50,000. Students may receive 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 10-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 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 research. 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 of Mexico sends graduate students mainly via the Fulbright Commission and the National Council of Science and Technology.

Panama. The Panamanian government's *Panama Bilingue* program has 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 5,000 Panamanian English teachers have traveled abroad to participate in two- to four-month programs, and another 8,500 have benefitted from similar programs locally in Panama. The Panamanian government expects 1,200 more teachers to travel during 2019 (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. This year, EducationUSA is co-organizing *BecasPy*, a mentorship program for Fulbright and FulbrightCal, as Becal has given funds to Fulbright for the selection process. This program will be held in three countryside cities, aiming to decentralize this opportunity.

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 (www.pronabec.gob.pe/2018_becas_pronabec.php). The government is evaluating the success of this program as there have been concerns about grantee desertion. Currently there is no information about a 2019 call for this program. *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 (<http://www.fulbright.org.uy/becas-para-uruguayos/%20beca-de-posgrado/>). Forty percent of all ANII funds are dedicated to supporting students attending U.S. universities.

Organization of American States.

Students from Latin America and Caribbean countries are eligible for the Rowe Fund (www.oas.org/en/rowefund). This interest-free loan of up to \$15,000 is available to F and J visa holders completing their last two years of undergraduate or graduate studies in U.S. colleges and universities. Applications can be submitted year-round. The Rowe Fund offers EducationUSA Opportunity Funds students from Argentina, Barbados, Bolivia, Chile, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, Paraguay, Uruguay, Venezuela, and Caribbean countries the opportunity to apply for this interest-free loan without the need for a U.S. 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 EducationUSA Roadshow in seven cities every spring (typically in April), 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 2018, the Roadshow reached more than 8,500 students. For more information, visit <http://educationusa.org.br/site/the-brazilian-educationusa-roadshow/>.

Caribbean. In addition to traditional, independently organized Caribbean college fairs, EducationUSA Bahamas, Barbados, Jamaica, and Trinidad and Tobago host fairs. The next Caribbean fair circuit will take place in October 2019.

Colombia and Costa Rica STEM Tour.

In March 2019, EducationUSA Colombia organized the third annual EducationUSA STEM Tour, with a new final stop in Costa Rica. With stops in five cities (four in Colombia and one in Costa Rica), 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.

Guatemala and Honduras EducationUSA

Tour. May 6-9, 2019, EducationUSA Guatemala and Honduras hosted four fairs in Quetzaltenango, Antigua, Guatemala City, and San Pedro Sula. Students are interested in language preparation, two-year and four-year programs, graduate studies, and short-term exchanges. The tour includes school visits and open public fairs in all stops, as well as cultural activities to enrich the experience.

High School Counselor Training

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

LLM Fair. In 2018, EducationUSA had its second South America LLM Fair circuit to eight cities in five countries: Rio, Brasilia, São Paulo, Curitiba, Buenos Aires, Santiago, Lima, and Bogota. The event included 42 U.S. HEIs and attracted approximately 1,500 visitors. The fall 2019 second annual LLM fair will take place in the same countries during October 2019.

For more information contact llmfair@educationusafair.org.

Mexico. EducationUSA and COMEXUS will again host the U.S.-Mexico Academic Mobility Forum in November 2019.

This year's event will combine open public fairs, school mini-fairs, academic conferences, one-on-one speed dating events, specialized workshops, and student mobility briefings.

South America. The 2018 South America EducationUSA fair circuit attracted 97 U.S. colleges and universities traveling through 12 cities, with more than 33,000 students in attendance. The 2019 South America EducationUSA Tour will take place August 25-September 18 (<http://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 and universities at these fairs for which U.S. institutions are encouraged to send materials.

Alumni Fairs. EducationUSA centers in Mexico, Guatemala, and Nicaragua will host Alumni Fairs in the Spring/Summer 2019. U.S. embassy and consulate officers will represent their alma maters after receiving guidance from their institutions

and EducationUSA advisers. U.S. HEIs are encouraged to mail the organizers the informational materials to be used in these fairs.

U.S. Study Abroad

Costa Rica continues to be the region's top receiving country with 8,333 U.S. students in AY 2016-2017, making it the ninth most popular study abroad destination worldwide for U.S. students. Mexico, Cuba, Ecuador, Peru, Argentina, and Chile are also leading host destinations in the region, ranked globally 12th, 15th, 18th, 21st, 23rd, and 25th, respectively. The Caribbean is the fastest growing sub-region as a study abroad destination, with significant increases, particularly in Grenada, Haiti, St. Vincent and the Grenadines, and the Dutch Caribbean islands. Other rapidly growing destinations in South America include Bolivia, Colombia, Guyana, and Paraguay; Central America saw decreases in all countries, except Belize.

Increased mobility from the United States to the Caribbean (7.9 percent) is the result of faculty-led programs and established exchanges, many focusing on health-related fields as well as gender and social issues.

After the signing of the peace agreement and the changes in the U.S. State Department Travel Advisory, Colombia has experienced a large increase in U.S. students. According to *Open Doors*, in AY 2016-2017 there was a 10-percent increase of U.S. students studying in Colombia. Colombia welcomes educational tourism opportunities and is finding ways to support the increased demand. Colombian universities are offering academic courses in English, in majors such as engineering, which facilitates semester study abroad options. Short-term faculty-led programs continue to be a popular option.

In 2018, U.S. embassies and Fulbright Commissions in Argentina, Ecuador, El Salvador, Mexico, and Panama received Study Abroad Engagement 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 Central America and 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 Years, and region-specific festivities such as Carnival, Holy Week, and All Saints Day/Day of the Dead. Check with REACs before planning a trip to avoid visiting during local holidays.



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