



Global Guide 2020



2020 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 *2019 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 between 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, nongovernmental 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 the 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 diversity 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. EducationUSA also works with recruitment agents identified by accredited U.S. higher education institutions as their representatives, incorporating them into relevant advising center activities including public events, information sessions, and consultations.

Opportunity Funds Program

The EducationUSA Opportunity Funds program assists high-achieving students who are competitive for full financial aid from U.S. colleges and universities but who lack financial resources to cover up-front 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 diversifying 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 strong relationships with local universities and schools. For U.S. HEIs seeking to establish or expand study abroad programs for American students, both the EducationUSA network and the U.S. Department of State’s USA Study Abroad Branch can provide support. For more information, visit the USA Study Abroad website at <https://studyabroad.state.gov>.



6.7 million+

Social Media "likes"

9,450+

Subscribers to the U.S. Higher Education Monthly Update

2.3 million+

Video views

Resources 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 these institutions' 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 \$46.5 billion to the U.S. economy in 2019 through their spending on tuition, room and board, and living expenses, making U.S. higher education one of America's leading service export industries. The International Student Economic Value Tool from NAFSA: Association of International Educators provides a state-by-state and congressional-district-based analysis of international students' economic contributions to the U.S. economy.

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 of the more than 4,000 accredited U.S. HEIs and supports HEIs that are working to increase their capacity to host international students. In academic year (AY) 2018-2019, approximately 70 percent of international students studied at only 200 colleges and universities. One of every three students studied in California, New York, or Texas. There are thousands of high quality institutions, including community colleges across all U.S. states looking to welcome international students.

Research on American and International Student Mobility

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 (IEPs).

EducationUSA Adviser and REAC Expertise

EducationUSA encourages the U.S. higher education community to connect with EducationUSA advisers and REACs in the United States as well as abroad. Institutions can engage by taking the following actions:

- 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.
- Participate in EducationUSA international student recruitment fairs throughout the year. EducationUSA fairs connect U.S. higher education institutions with local students interested in opportunities to study in the United States.
- Engage with EducationUSA online and virtually through participation in virtual fairs, webinars, consultations, and other events.



- 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:

- » Host an 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>.

- » Engage in 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 often 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.

- Host or attend an EducationUSA Seminar: This day-long seminar brings together higher education institutions in a regional area to share best practices in campus internationalization, learn about U.S. government resources for promoting U.S. colleges and universities to students overseas, and discuss ways to build networks for both international student recruitment and support. Institutions new to international student recruitment are especially encouraged to attend.

- Contribute your experience and expertise at virtual or in-person EducationUSA advising center events.

- 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.

Strategies for International Student Recruitment

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. In addition to the regional information contained in this guide, take advantage of the *Open Doors Report on International Educational Exchange* and the EducationUSA center and country fact sheets available on the EducationUSA website.
- Visit EducationUSA advising centers to engage student audiences and gain exposure for your institution 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.

Enhanced Outreach and Networking

In addition to resources such as presentations on timely issues in the field of higher education and country reports, EducationUSA offers an array of services for U.S. higher education, including:

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

Exclusive Website 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 to members of higher education professional associations. A higher education professional login enables users to access information that can be found only at <https://educationusa.state.gov> and to post their institutions' scholarship opportunities for international students.



Dedicated Domestic Outreach Team

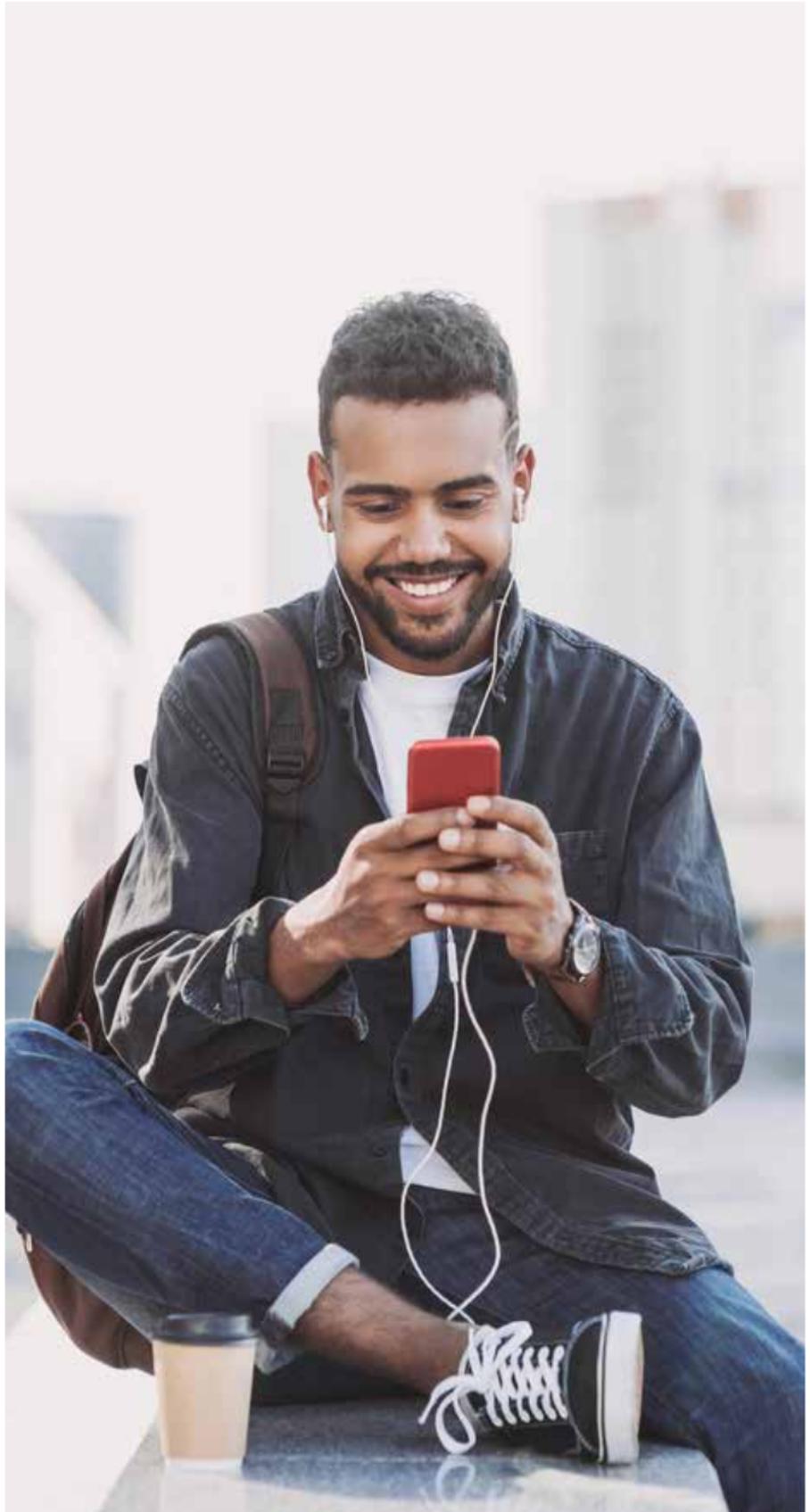
EducationUSA values its relationship with the U.S. higher education community and has created a dedicated domestic outreach team to engage U.S. higher education institutions through a variety of initiatives, including:

- Offering EducationUSA Seminars
- Expanding best practices in internationalization
- Identifying and sharing best practices in international student campus integration
- Supporting collaboration and networking among U.S. higher education institutions
- Promoting the U.S. community college system and 2+2 model for international student transfer to a four-year college or university

Expanded Collaboration with Stakeholders

EducationUSA is committed to working with the full array of institutions, organizations, and individuals that advance opportunities for qualified international students to study in the United States. This includes agents identified by accredited U.S. higher education institutions as their representatives overseas. EducationUSA content and other relevant resources—including this annual publication, *Global Guide*; *Student Mobility Facts and Figures* information sheets; and the EducationUSA website—are available to the public, including agents.

EducationUSA advisers may engage with recruitment agents and incorporate them into relevant advising center activities, including public events, information sessions, and consultations, as capacity allows. EducationUSA advising centers adhere to strict ethical practices in promoting all accredited U.S. colleges and universities and in advancing students' interests in identifying the institutions at which they are best positioned for success. It is incumbent upon each organization or individual seeking access to EducationUSA programming to verify their relationship to one or more accredited U.S. higher education institutions and adhere to ethical standards.



EducationUSA By the Numbers

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

Number of In-Center Contacts, by Type	
Individual advising appointments	92,446
Advising by phone or SMS (each conversation)	219,262
Advising by email	416,498
Group advising attendees	210,584
Walk-ins/library/computer users	353,392
U.S. institution representatives	8,976
MOOC Camp attendees	10,012
Total	1,311,170
Number of Event Attendees, by Outreach Activity	
Education fairs	653,632
American Corners/Centers	118,858
Local universities/secondary schools	454,185
Other fairs/conferences/seminars	133,762
Host government events	11,308
Embassy/consulate events	23,948
Public locations	32,534
Other activities	60,033
Total	1,488,260
Number of Virtual/Social Media Contacts, by Type	
Social networks - page likes	6,798,154
Instagram followers	1,305,578
Videos/video channels views	2,395,625
Skype contacts & IM advising calls	56,760
Blog followers	24,030
Twitter/microblog followers	1,368,509
Digital Video Conferences (DVC) participants	1,075
EducationUSA webinar participants	23,969
EducationUSA Interactive Session views	30,914
Virtual fairs - EdUSA booth & session visitors	4,516
Total	12,009,130
Unique website visitors (Center and flagship websites)	
Total	3,227,814
Grand Total	18,036,374

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

Regional Educational 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 who have college degrees (U.S. Bachelor's degree or equivalent) and are proficient in spoken and written English
- Provides virtual advising and consulting, including through email, the 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 information 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 videoconferencing 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 digital 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 around the world.

Platforms and Trends

Facebook, Instagram, and LinkedIn are the dominant social media platforms for EducationUSA, where available. Twitter and YouTube are also popular social platforms for EducationUSA. The flagship EducationUSA Facebook page reached more than 387,000 "Likes" in 2019, while the flagship Twitter account had approximately 26,000 followers. The EducationUSA Instagram account was relaunched in 2019 and has been growing strongly, with approximately 45,000 followers as of December 2019. The EducationUSA LinkedIn account had nearly 5,000 followers at the end of 2019. EducationUSA continues to make use of Facebook Live and virtual meeting platforms such as Zoom and Google Meet to expand and enhance outreach.

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, advisers in China connect with students via the WeChat application and the micro-blogging site Sina Weibo. Similarly, those in the Republic of Korea employ Kakao Talk and Naver. WhatsApp is also popular in many regions of the world. Where an in-person advising presence is not feasible—as is the case in Belarus, Iran, Libya, and Syria—EducationUSA advising centers operate exclusively on virtual platforms.

Global Marketing Campaign

EducationUSA has invested in the creation of a global marketing campaign focused on promoting the United States as the top study abroad destination for international students, with specific messaging on how a U.S. education can help position students for a successful future. Expected products of this campaign include marketing assets, multiple messaging pillars, and digital tool kits that will strengthen the EducationUSA brand and serve as a resource for the U.S. higher education community to leverage.

EducationUSA Interactive Webinars

The EducationUSA Interactive series, produced in collaboration with the U.S. Department of State's Bureau of Global Public Affairs Interactive Team, consists of studio-produced Facebook Live programs (hosted on EducationUSA's Facebook page) featuring international students, U.S. higher education representatives, and other experts discussing timely themes such as American campus culture, the financing of U.S. study, college and university admissions, and the U.S. visa process. Other topics have included student athletes, Muslim student experiences, LGBT campus communities, support for international students with disabilities, and community colleges. The Interactives attract viewers from around the world, and viewers can engage with panelists in real time. Interactives are available for viewing on YouTube, as well as digestible clips of individual questions and answers for quick and easy reference.

EducationUSA Website

EducationUSA's mobile-friendly website, <https://educationusa.state.gov>, serves as the central information hub for the EducationUSA network. There, international students and their parents can find reliable information about studying in the United States. Advisers regularly post information to the site about upcoming in-person and virtual events, making it the best place to find listings of EducationUSA events worldwide. In addition, social media posts from EducationUSA's Instagram account are pulled onto the homepage, creating a more interactive and dynamic site. Furthermore, with links to social media on each page, users can share pertinent information about study in the United States with their own social network. The site also provides resources for U.S. higher education institutions, as well as foreign institutions and government users. Higher education professionals can request a login to access REAC contact information, subscribe to the monthly e-newsletter, and submit scholarship opportunities and news stories targeted to the international student audience for posting to the site. All users can now access yearly *Student Mobility Facts and Figures* sheets for countries and locations worldwide.



Facebook
Likes: 5.8 million+



Twitter
Followers: 1.3 million+



Instagram
Followers: 1.3 million+

EducationUSA Regional Reach

Contacts Made in 2019 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	278,926	101,950	177,430	51,422	325,500	375,942
Advising center-based contacts	278,434	100,276	175,623	50,515	324,020	373,326
U.S. institution representative contacts	492	1,674	1,807	907	1,480	2,616
Total contacts made through outreach activities	172,830	265,240	234,708	229,716	270,746	315,020
Education fairs	18,994	48,947	138,974	206,173	89,857	150,687
American Corners/Centers	28,769	25,848	24,321	5,445	22,470	12,005
Local universities/secondary schools	94,116	108,623	49,776	9,645	105,506	86,519
Other fairs/conferences/seminars	10,494	56,015	12,400	5,110	24,595	25,148
Host government events	879	6,083	136	924	1,235	2,051
Embassy/consulate events	1,778	7,005	2,782	343	5,759	6,281
Public locations	1,305	8,430	2,186	655	12,885	7,073
Other activities	16,495	4,289	4,133	1,421	8,439	25,256
Total contacts made through virtual platforms	2,921,203	2,907,331	758,238	877,153	2,504,007	1,366,323
Social media platforms	2,918,344	2,905,524	749,595	876,214	2,500,475	1,359,059
Webinars, DVCs	2,859	1,807	8,643	939	3,532	7,264
GRAND TOTAL	3,372,959	3,274,521	1,170,376	1,158,291	3,100,253	2,057,285

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



In the 2018-2019 academic year, over 1 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

U.S. education service exports ranked fourth among service exports in 2019. International students studying in the United States contributed over \$46.5 billion to the U.S. economy in tuition and living expenses during the 2019 calendar year, for a trade surplus of \$37.2 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 Washington, DC; in more than 100 cities throughout the United States; and in U.S. embassies, consulates, and business centers in more than 75 countries. These professionals are dedicated to helping U.S. education service providers get started in exporting and developing partnerships in new global markets.

The U.S. Commercial Service and its Global Education Team assist U.S. educational institutions in building a recruitment pipeline and partnership channels through 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. Support offered includes 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 highlights 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 trade.gov/education-industry.

export.gov/industry/education



EducationUSA

EducationUSA is the U.S. Department of State's global network of more than 430 international student advising centers staffed by approximately 550 professionals in more than 175 countries and territories worldwide. EducationUSA is the Department's official source of information on U.S. higher education and, in an increasingly competitive global environment, promotes the value of U.S. higher education to students, families, institutions, and governments abroad.

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). The report is 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, Ethiopia, Gabon, The Gambia, Ghana, Guinea, Guinea-Bissau, Kenya, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mauritius, Mozambique, Namibia, Niger, Nigeria, Reunion, Rwanda, St. Helena, Sao Tome and Principe, Senegal, Seychelles, Sierra Leone, Somalia, South Africa, South Sudan, Sudan, Tanzania, Togo, Uganda, Zambia, Zimbabwe

54

EducationUSA Advising Centers in the Region

38 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 Africa is home to distinctive, talented, and motivated students. The region has a growing population of nearly 1.1 billion people, 20 percent of whom are between the ages of 15 and 24. The Population Reference Bureau projects the African population will more than double to 2.6 billion by 2050, growth which will account for more than half of the global population increase during that time.

EducationUSA Sub-Saharan Africa has 54 advising centers—38 comprehensive, 13 standard, and three reference—and 58 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 (for example, the Fulbright Program and the Hubert H. Humphrey Fellowship Program), English language programs, and alumni coordination.

U.S. embassies and consulates host nearly all EducationUSA advising centers, which allows for collaboration with Consular sections, American Spaces, and other U.S. Mission staff members. The Opportunity Funds program operates through the advising centers in Botswana, Eswatini, Ethiopia, Ghana, Kenya, Malawi, Namibia, Nigeria, Rwanda, South Africa, Togo, Uganda, Zambia, and Zimbabwe.

Regional Overview

Less than 10 percent of Sub-Saharan African youth enroll in postsecondary education. In Nigeria, access to higher education opportunities is so competitive that an estimated 1 million high school graduates annually are left without a university placement. This imbalance presents an opportunity for higher education institutions (HEIs) around the world to recruit students from the region.

According to a February 13, 2020 article from University World News (“The Scramble for Africa’s Growing Student Population”), institutions in Europe, the Middle East, and beyond are likely to increase outreach to African students in the coming years.

In academic year (AY) 2018-2019, Sub-Saharan African students from 50 countries and one territory studied in the United States. According to the annual *Open Doors* report, more than 40,000 students from Sub-Saharan Africa were studying in the United States in AY 2018-2019, a 2.1 percent increase over the previous year. Over the past five years, the number of students from the region studying in the United States grew by 29.5 percent.

A little more than half of the students from Sub-Saharan Africa are pursuing Bachelor’s degrees, 31.1 percent are pursuing graduate studies, 13.3 percent are in Optional Practical Training (OPT), and the remaining students are in non-degree programs.



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



by New York, Massachusetts, California, and Maryland.

Among African students in the United States, 31 percent are studying at the graduate level, a 5 percent increase over the previous year. Ghana, Nigeria, Sudan, and Uganda all sent more than 100 graduate students to the United States in AY 2018-2019. In terms of undergraduate study, Ethiopia and Gabon experienced the largest growth over the past year in the number of students in the United States. More than 70 percent of internationally mobile students in a significant number of African countries are pursuing undergraduate degrees in the United States. These countries are Angola, Burkina Faso, Republic of the Congo, Democratic Republic of the Congo, Djibouti, Equatorial Guinea, Gabon, Guinea, Mali, Somalia, and South Sudan.

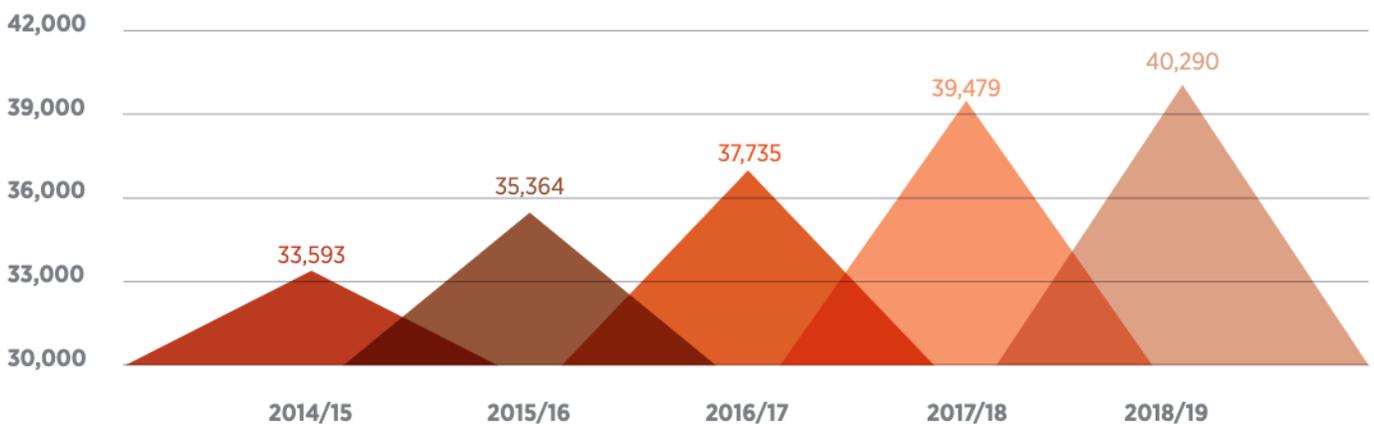
Approximately 16 percent of Sub-Saharan African students attend community colleges. EducationUSA advisers promote the community college 2+2 model and encourage students with an interest in community colleges to consider institutions that have articulation agreements with four-year institutions offering programs in their areas of academic or career interest.

Due to strong cultural and family influence, many African students start their studies in science, technology, engineering, and mathematics (STEM)

The more than 5,000 students from the region pursuing OPT represented a 12 percent increase over the previous year. A 5.3 percent increase in graduate students and a 2.7 percent increase in non-degree students more than offset the 2.1 percent decline in the number of students pursuing undergraduate degrees. Sub-Saharan African students primarily go to the United States to earn degrees; only 3 percent of students are studying in non-degree programs.

West Africa is responsible for 53 percent of Africa's total student population studying in the United States, followed by East Africa, with 23 percent; Southern Africa, with 16 percent; and Central Africa, with 8 percent. West Africa experienced the strongest growth (5 percent) in the number of students studying in the United States. Although African students study in all 50 states, Texas is the most popular, with 13.7 percent of all African students, followed

Student Mobility in the Region (Five-Year Trend)



Sub-Saharan Africa

and pre-professional fields. In many cases, however, exposure to new fields sparks interest in other areas of study. The freedom to choose their majors, combine disparate fields, and get practical experience is particularly appealing to Sub-Saharan African students.

Personal relationships are valued and vital in Sub-Saharan Africa. For effective recruitment, it is essential to travel to the region or offer interactive webinars. Students and families are more likely to invest in educational institutions with which they have had face-to-face interactions. EducationUSA and U.S. embassies and consulates actively support U.S. 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. As more students complete undergraduate degrees in the United States or in their home countries, this trend will likely continue. Graduate study in the United States is particularly desirable because of the breadth of programs offered, in contrast to the more limited offerings at institutions in

students' home countries. Students from smaller countries need to look abroad for graduate study in fields beyond the most basic ones.

Parents generally have a favorable view of the United States and support their children studying there. At the same time, many parents are concerned about safety and security, and these considerations factor into their decision-making. Providing clear information about safety measures, regulations, and policies on campus, particularly for residence halls, will resonate positively with parents. Students will also benefit from having this information to share with their parents and should be encouraged to discuss how seriously U.S. institutions take safety and security.

Countries in the Spotlight

The following 11 Sub-Saharan African countries all send more than 1,000 students to the United States (IIE *Open Doors* report data for AY 2018-2019): Angola, Cameroon, Côte d'Ivoire, Democratic Republic of the Congo, Ethiopia, Ghana, Kenya, Nigeria, Rwanda, South Africa, and Zimbabwe. The top five sending countries (from highest to lowest senders)—Nigeria, Ghana, Kenya, Ethiopia, and South Africa—account for more than 60 percent of students from the region studying in the United States.

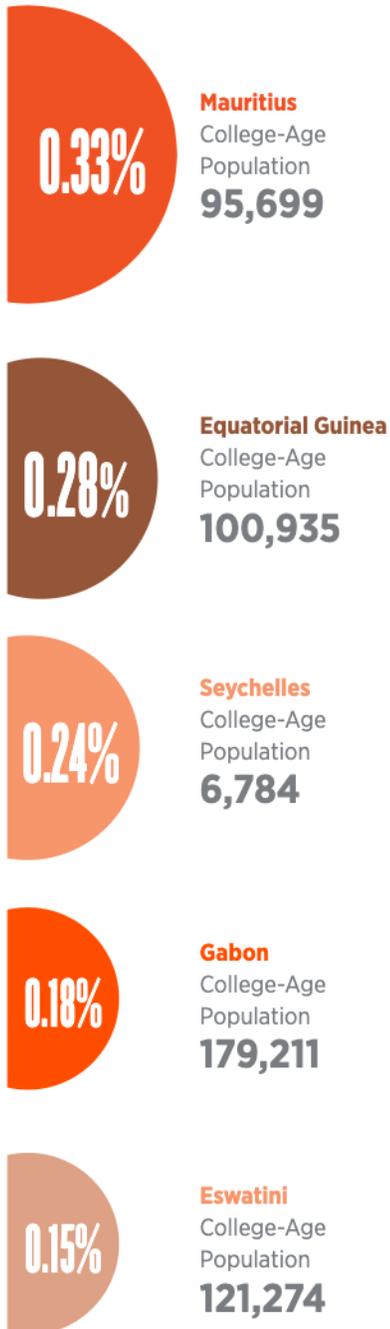
Ethiopia is the fourth largest Sub-Saharan Africa sender of students to the United States. Ethiopia's population is growing, and 20 percent are between the ages of 15 and 24. According to UNESCO, the United States is the top destination for degree-seeking Ethiopian students. Beyond the United States, Ethiopian students study in Finland, India, Italy, Norway, Saudi Arabia, South Africa, the Republic of Korea, and Turkey. In 2018 the Chinese government provided more than 1,450 scholarships for Ethiopians, mostly for short-term vocational training, as well as graduate programs at Chinese universities.

According to *Open Doors* data, in AY 2018-2019, 2,061 Ethiopian students were studying in the United States, a 2.7 percent decline from the previous year. Most Ethiopian students—65 percent—are enrolled at the undergraduate level; 22 percent are at the graduate level, 11 percent are in OPT, and 3 percent are in non-degree programs. The 2.7 percent decrease reflected declines in the number of graduate and non-degree students. The number of Ethiopian undergraduate students in the United States increased by 12.5 percent, while OPT students increased by 7.9 percent.

Ethiopian students are most interested in studying in STEM fields, likely because of the country's 2008 education policy



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: 2017 Population of the official age for tertiary education, both sexes

requiring 70 percent of students to study science and technology and 30 percent to study the humanities and social sciences.

Ghana became the second largest sender of students to the United States in AY 2018-2019, with 3,661 students, an almost 14 percent increase over the previous year. According to UNESCO, the United States is Ghana's top study abroad destination. More than half of the Ghanaian students in the United States are studying at the graduate level. Ghana is now in the top 25 of all international sending countries for graduate students.

One of the most stable countries in West Africa, Ghana attracts more than 30,000 international students each year. Institutions around the world have established partnerships and study abroad agreements with Ghanaian institutions. In AY 2017-2018, more than 2,000 U.S. students studied in Ghana, an 18 percent increase over the previous academic year.

Ghana has a population of more than 30 million people, more than half of whom are under 25. Enrollment is limited at Ghanaian public universities; on average only 20 percent of all university applicants are offered the opportunity to enroll in a higher education institution. The country struggles to meet the demand for inclusive and high-quality education. Rapid population growth, economic development, scholarship availability, and the increasing demand for higher education are incentives for Ghanaian students to pursue study abroad.

Kenya is Sub-Saharan Africa's third largest source of students to the United States, with 3,451 students studying in the United States in AY 2018-2019. UNESCO reports the United States remains the number one destination of Kenyan study abroad students. Approximately 58 percent of Kenyan students are undergraduates, and 27.8 percent study at the graduate level.

Two years ago, Kenya's government tightened university admission policies; in 2017, national exam testing procedures were tightened to combat grade inflation. As a result, fewer high school graduates qualified to enroll at local universities. In recent years, as few as 11 percent of Kenyan students have been offered

university placements. This turmoil, combined with strikes and inadequate facilities at local universities, may lead students and their families to pursue U.S. education for first-year or transfer undergraduate studies.

Kenya's population of college-aged students is projected to hit 5.7 million by 2024. These students hold the promise of meeting Kenya's goal of becoming a middle-income country by 2030. Kenya's higher education system has expanded rapidly in recent years, largely due to the establishment of several private universities and polytechnic schools. But there are persistent concerns about quality, and government funding has been declining. UNESCO estimates that almost 15,000 Kenyans are studying abroad, mostly in the United States, Australia, the United Kingdom, and South Africa.

Nigeria is the top sending country in the region. The 13,423 Nigerian students studying in the United States in AY 2018-2019 represented one-third of all Sub-Saharan African students in the United States. Nigeria is the 11th largest sending country in the world, up from its rank of 13th the previous year.

Nigeria experienced an almost 6 percent increase in students studying in the United States in AY 2018-2019. While

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

Country	2018/19	% Change 2017/18
Nigeria	13,423	5.8%
Ghana	3,661	13.9%
Kenya	3,451	3.9%
Ethiopia	2,061	-2.7%
South Africa	2,042	0.1%
Côte d'Ivoire	1,392	3.2%
Zimbabwe	1,343	1.4%
Rwanda	1,292	4.9%
Cameroon	1,188	-14%
DR Congo	1,164	3.7%
Angola	1,014	-14.3%

Sub-Saharan Africa



10.6 percent increase among graduate students.

South Africa's population of about 59 million people is projected to reach 64 million by 2030. University-aged students make up around 8 percent of the country's population. According to UNESCO (2017 data), there are approximately 8,000 South African students studying overseas, representing only 0.16 percent of the country's university-aged population. Like other countries in the region, South Africa will likely be unable to meet the demands of its students who qualify for university admission. In AY 2018/2019, approximately 48 percent of all South African students overseas chose an English-speaking study destination, with largest numbers of students choosing the United States, the United Kingdom, and Australia.

The most popular fields of study for South African students are engineering, biology, business, and the performing arts.

Countries to Watch

Côte d'Ivoire. In AY 2018-2018, Côte d'Ivoire was the sixth largest sending country in the region and reached its highest number yet of students studying in the United States. Over the past five years, the number of students from Côte d'Ivoire studying in the United States has increased by 24.73 percent.

Rwanda. Rwandan students are choosing to study in the United States in higher numbers than ever before. AY 2018-2019 saw a record number of Rwandan students pursuing undergraduate, graduate, or non-degree study in the United States. Over the past five years,

the number of undergraduate students declined by about 3 percent, this was more than offset by an almost 11 percent increase in graduate students and significant increases in students pursuing OPT and non-degree programs.

There are currently 85,251 Nigerian students abroad; the most popular study destinations are the UK, the United States, and Malaysia. Over the past several years, the most popular fields of study for

Nigerian students in the United States have included business, engineering, and physical sciences, and health-related fields.

In AY 2018-2019, more than 2,000 students from **South Africa** studied in the United States, making it the fifth largest sending country in Sub-Saharan Africa. Of these students, 1,156 studied at the undergraduate level and 550 at the graduate level, representing a 6 percent increase among undergraduates and a

African Students by Level of Study in the Region

Associate	6,003
Bachelor	18,636
Master	12,064
Doctorate	5,380
All Other	2,071

Source: SEVIS, January 2020

Regional Student Totals Top Five Countries of Origin

Country	2018/19	%Change
Nigeria	13,423	5.8%
Ghana	3,661	13.9%
Kenya	3,451	3.9%
Ethiopia	2,061	-2.7%
South Africa	2,042	0.1%

the number of Rwandan students studying in the United States has more than doubled, from 565 in AY 2013-2014 to 1,232 in AY 2018-2019.

The following 10 countries with fewer than 500 students studying in the United States had over 30 percent increases in student enrollment in the last five years (listed in percentage order): Somalia, South Sudan, Namibia, Sudan, Liberia, Central African Republic, Lesotho, Mauritius, Guinea, and Mauritania. U.S. HEIs should consider including these countries in Sub-Saharan Africa recruitment efforts.

What to Expect in the Next Three to Five Years

Africa is home to the world's fastest growing college-aged population. According to the United Nations, Africans under the age of 35 are forecast to account for 42 percent of the continent's population by 2030, and this number will continue growing throughout the remainder of the century. The growth of this demographic will lead to rising demand for higher education and international study across the continent.

China's investments in scholarships for international students will likely increase the number of African students in China. India and Russia are also poised to increase scholarships for African students. According to an April 18, 2019 press release from China's Ministry of Education, in 2018, 81,562 African students studied in China, double the number of African students *Open Doors* reported studying in the United States that year (40,290).

Virtual Engagement 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. For many, mobile phones are the primary way to access the internet. WhatsApp is by far the most popular platform for social media use for individual and group communications. Facebook remains extremely popular, with more than 170 million users out of a population of 1.06 billion people. EducationUSA advisers

use both Facebook and WhatsApp to share information and plan activities with students, parents, and counselors.

Online platforms are tapping into a growing interest in higher education. Unicaf University, an online higher education platform, enrolled 25,000 students in January 2019, reflecting 108 percent growth in four years. ELearnAfrica announced a partnership with the Association of African Universities to expand online learning opportunities for students enrolled in its 380 member institutions, potentially making educational opportunities available to 10 million African students. Pan African University officially launched its e-learning arm in December 2019, allowing millions of Africans to enroll in online courses and programs.

Mobile phone use is skyrocketing throughout Sub-Saharan Africa. As mobile technology becomes more widespread and less expensive, more Sub-Saharan Africans will have access to technology

that was previously unavailable. Already, the majority of Sub-Saharan African students access the internet via mobile phones.

According to a September 26, 2019 report by the Brookings Institution ("Africa's Growing Mobile Economy"), half the population in Sub-Saharan Africa will subscribe to mobile services by 2025. Across the continent, the growing youth population will significantly influence patterns of cellular usage in the future.

Africa is growing as a hub of advanced technology and research. In April 2019, Google opened its first artificial intelligence (AI) lab center in Accra, Ghana. Google also supports machine intelligence programs at the African Institute for Mathematical Sciences Center in Rwanda. In May 2019, Microsoft launched its Africa Development Centre, with two sites in Nairobi, Kenya, and Lagos, Nigeria. Local developers are expected to focus on transformative

U.S. Study Abroad

Top Five Receiving Countries in the Region

Destination	2017/18	% Change
South Africa	6,001	-0.7%
Ghana	2,210	18.5%
Tanzania	1,556	14.1%
Kenya	927	19.2%
Uganda	837	-0.9%

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

Country	2014/15	2018/19	% Change
Namibia	167	237	41.9%
Zambia	291	372	27.8%
Uganda	685	837	22.2%
South Africa	4,968	6,001	20.8%
Tanzania	1,294	1,556	20.2%

Sub-Saharan Africa

technologies, such as AI and machine learning.

Additionally, Africa leads the world in digital financial services, more commonly known as mobile money. According to the Bill and Melinda Gates Foundation, since the introduction of mobile money transactions just over a decade ago, Africa now hosts almost half of the world's 277 mobile money services.

Successful Recruiting Strategies

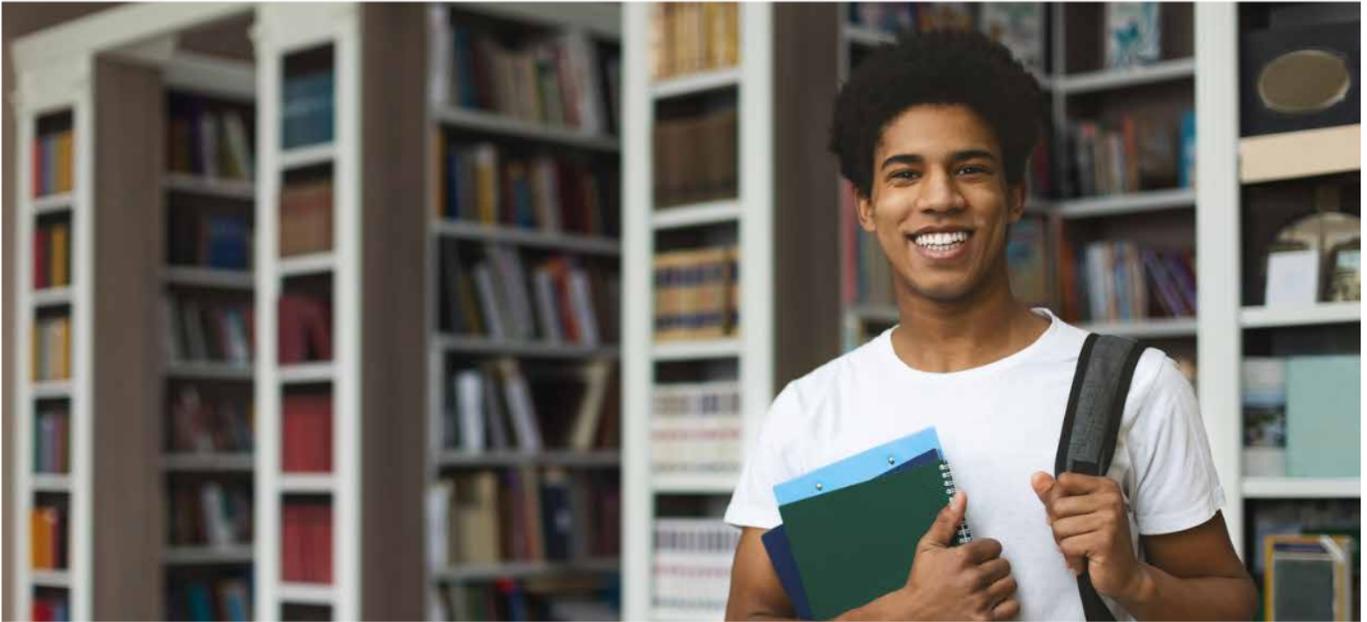
- Parents are typically the primary decision-makers in the choice of a school. It is wise to engage parents, welcome their questions, and clearly explain the benefits of studying at your institution.
- EducationUSA advisers use a combination of criteria to select students participating in EducationUSA scholars programs. Criteria include the student's motivation, work ethic, academic records, participation in the community, and references. Selected students typically work with EducationUSA advising centers for at least one year and demonstrate strong preparedness to study in the United States.
- Consolidate scholarships into meaningful funding awards; this will make a big difference to Sub-Saharan African students who need funding. Three USD\$10,000 scholarships won't be useful, for example, should a student have a US\$30,000 gap. Instead, consider offering a single US\$30,000 scholarship and enabling one student to study in the United States. This will have a direct effect on others considering the institution.
- Travel with other HEI representatives. Small-group travel provides students, parents, and local education administrators a better understanding of the diversity of U.S. HEIs. Students are better able to discern differences among institutions and select the right fit for their needs.
- Be prepared to respond to advisers' requests for your materials for EducationUSA "Homegrown College Fairs" or alumni fairs. More EducationUSA centers will be holding these college fairs with U.S. alumni, Peace Corps volunteers, embassy and consulate staff, and staff from other U.S. offices (such as the Centers for Disease Control and Prevention and the U.S. Agency for International Development [USAID]) representing their alma maters. This model is quite successful and provides institutions exposure when they are not able to recruit in person.
- Consider waiving application fees. This will encourage students to apply. Making the payment is a practical challenge for many potential Sub-Saharan African students and their families. Most students in the region use local mobile money accounts on their phones, rather than bank cards. Obtaining U.S. dollar checks from banks is an expensive and cumbersome process. Additionally, some countries do not allow money to transfer out of the student's home country.
- Offer vouchers for students to complete the College Scholarship Service (CSS) Profile for financial aid. Students will appreciate vouchers or the acceptance of a hard-copy International Student Financial Aid Application (ISFAA), which lower barriers to access for many students.
- Offer flexibility in testing requirements. This is especially important in countries where specific tests are still not offered or are paper-based (GRE, TOEFL, etc.) and only offered three times per year.
- Remember that secondary schools may appear run-down or have poor infrastructure; however, this is not a reflection of the quality of the education and the students attending the school.
- Clearly state the total cost of attendance on the website; hidden costs and fees can prohibit students from attending at the last minute or present financial challenges once they are on your campuses.
- Respond as quickly as possible to student inquiries. Students and their parents view responsiveness as a signal of interest.
- Direct admitted students to the EducationUSA Pre-Departure Orientation Sessions usually held in July. These sessions will focus on, among other issues, broad cultural differences between the United States and Sub-Saharan Africa, whereas campus orientations will focus on adjusting to life in the United States.

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

Country	2014/15	2018/19	%Change
Rwanda	800	1,292	61.5%
Namibia	67	105	56.7%
DR Congo	755	1,164	54.2%
Liberia	168	255	51.8%
Nigeria	9,494	13,423	41.4%

61.5%

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



- Check in on your students once they have arrived at your institution. If students are warmly welcomed and integrated into an institution, they will share their experiences with friends and family back home.

Institutional Partnerships

In January 2020, Assistant Secretary of State for the Bureau of African Affairs Tibor Nagy traveled to the Central African Republic, Ethiopia, Kenya, Somalia, South Sudan, and Sudan to promote university partnerships. During the tour, Assistant Secretary Nagy promoted the September 2019 University Partnerships Initiative (UPI), a program of the U.S. Department of State designed to strengthen ties and encourage collaboration between U.S. and African universities. The UPI supports higher education links that expose African students, faculty, and administrators to the diversity and innovation of American campuses.

The goals of UPI are to 1) promote and expand U.S.-Africa faculty and student exchanges, especially in dual-degree programs in which Africans can complete their studies in their home countries; 2) encourage joint research, especially in agriculture, food security, and STEM, all areas critical to Africa's future development; 3) support training and skills transfer in all aspects of university administration; and 4) tap American universities' expertise in working with the private sector, with an emphasis on

research, commercialization, technology transfer, and job creation.

In February 2020, the Department of State held a U.S.-African University Partnerships Forum in Washington, DC. The meeting, convened by Assistant Secretary Nagy, brought together more than 150 higher education leaders from the United States and across Africa, as well as several Washington, DC-based members of the African diplomatic corps.

Building Africa and U.S. university partnerships is a priority among U.S. embassies and consulates in Africa. The following are examples of partnerships with universities in Sub-Saharan Africa.

South Africa

- The U.S. embassy in South Africa has worked closely with governmental and quasi-governmental agencies and departments to establish successful higher education initiatives, such as the U.S.-South Africa Higher Education Network. This network has piloted a tripartite mentorship model with U.S. universities that serves to grow the number of qualified faculty at South African universities and create other collaborative ties between U.S. and South African universities. For example, since 2018, the University of Pretoria has collaborated with Rutgers University and the University of Venda in Limpopo to grow the U.S.-South Africa Higher Education Network,

with an emphasis on supporting the development of a pipeline of South African doctoral candidates, staff development, and curriculum development.

- Under the same initiative, the University of Missouri, Rutgers University–Newark, the University of Western Cape, and the University of Pretoria are collaborating with South Africa's Department of Higher Education and Training under the University Capacity Development Programme to support community development and education. Many more partnerships are underway, focusing on research collaboration as well as academic capacity building between U.S. and South African HEIs.
- The U.S. embassy in South Africa is partnering with the National Research Foundation to offer a one-year Fulbright Visiting Researcher scholarship for eligible South African doctoral candidates who will work toward their South African degree at a U.S. research institution. This initiative supports the South African government's goal to increase the number of doctoral graduates to 5,000 per year by 2030.
- A delegation from the United States recently visited South Africa to build a transatlantic education bridge in the context of a 21-year sister partnership between Tacoma, Washington and George, Western Cape. This U.S.

Sub-Saharan Africa

delegation has growing partnerships with two technical and vocational education and training colleges in Cape Town (in False Bay TVET College and Northlink College).

- Over the past two years, the Western Cape Regional Office of the Department of Higher Education, Science, and Technology has been working with San Mateo County Community College in California to conduct staff professional development and student exchange partnerships.
- Montgomery College and the Maryland International Education Consortium are working with EducationUSA to promote community colleges in the United States.



Equatorial Guinea

- In 2019, the Equatoguinean Minister of the Ministry of Mines and Hydrocarbons (MMH) and representatives from Prairie View A&M University and Texas Southern University signed a memorandum of understanding to educate recipients of a recurring full ministry scholarship for undergraduates. Equatorial Guinea has long had strong ties to Texas due to social and economic linkages with several Houston-area communities and companies. The Ministry currently focuses on two Historically Black Colleges and Universities (HBCUs) because they are perceived as being more affordable and collaborative in managing administrative needs. GEPetrol and MMH will administer the program for 50 to 100 students per year. The embassy will seek to support these relationships through English programming and consular outreach.

Ethiopia

- The journalism and communication departments at Ohio State University and the University of Gondar have been sharing experiences, skills, and resources that will be crucial for maintaining quality education.
- Rutgers University's Robert Wood Johnson Medical School is partnering with Jimma University to establish a Cardiology and Emergency Medical Department at Jimma University Medical Center as part of an initiative called JUST-Jimma University Strategic Team Empowerment.

- The University of Wisconsin–Madison and Hawassa University have been working on the “Joint Curriculum Development for Fellowship Training in Women’s Health” to create three evidence-based modules on maternal-fetal medicine and urogynecology. Skilled women’s health professionals at Hawassa University have been collaborating, sharing information, and conducting exchanges with University of Wisconsin experts.
- The University of Maryland is partnering with Debre Berhan University to implement community outreach through a Women in Agriculture program to enhance the capacity of the university and improve the livelihoods of women in the community.
- The University of North Texas is working with Jimma University to enhance the digital repository of university research output.
- Bowling Green State University and Mettu University work in partnership to strengthen Mettu’s professional and administrative capacity, improve its information network and digital libraries, and build English language programs through onsite training and research.
- Cornell University partners with Jimma University on a joint project focused on clean-burning pyrolysis cookstoves and sustainable-soil biochar systems.

Ghana

The U.S. embassy estimates that more than 100 types of partnerships exist between American and Ghanaian universities, largely due to the personal connections established with Fulbright and other exchange programs for students and faculty from both countries. While most of these partnerships involve large public Ghanaian universities, there is a small number of burgeoning partnerships with private universities. The broad goal is to strengthen the professional capacity of faculty in specific areas of study, particularly STEM and the humanities.

The following are a few examples:

- The University of Ghana has exchange agreements with Brown University, Howard University, Tufts University, University of Alabama, University of Connecticut, University of Oregon, and University of Virginia.
- The University of Cape Coast has a long-standing relationship with Grand Valley State University’s education program, Clarion University, Kennesaw State University, and Louisiana State University.
- Kwame Nkrumah University of Science and Technology in Kumasi has a 2+2 agreement with Arizona State University and a relationship of over a decade with North Carolina A&T State University.

Malawi

- Lilongwe University of Agriculture and Natural Resources has been in partnership with Michigan State

University through the Innovation Scholars Program and the Global Center for Food Systems Innovation via the Frugal Innovation Practicum. Lilongwe also partners with Tufts University through the Malawi Dietetic Program (both funded by USAID).

- With support from the Lemelson Foundation and the Rice 360° Institute for Global Health Technologies, Rice University partners with the engineering department at the Polytechnic (part of the University of Malawi in Blantyre). The partnership aims to improve healthcare by replicating the success of Rice's engineering education programs for global health and by promoting shared innovation between students at the two campuses.
- The University of Denver and the Virginia Polytechnic Institute and State University (Virginia Tech) offer their students a study abroad program at Mzuzu University's Environmental Sciences department, focusing on water, sanitation, and hygiene.
- The Strengthening Higher Education Access in Malawi Activity program is an Arizona State University–led partnership with five Malawian universities. Supported by USAID, it aims to transform higher education in Malawi.
- The University of North Carolina Project-Malawi is a collaboration between the University of North Carolina at Chapel Hill and the Malawi Ministry of Health. The project is based on the campus of Kamuzu Central Hospital in Malawi's capital, Lilongwe. The mission of the project is to identify innovative, culturally acceptable, and affordable methods to improve the health of the people of Malawi through research, capacity building, and care.
- Auburn University has a long history of partnerships with Malawi through the School of Fisheries, Aquaculture and Aquatic Sciences, the College of Agriculture, the Masamu Advanced Study Institutes and Workshops in the College of Sciences and Mathematics, study abroad programs in the College of Education and the School of Nursing, and numerous faculty and staff exchanges.

Public-Private Partnerships

Nigeria and Coca-Cola developed a public-private partnership that was piloted in AY 2019-2020. The program supports successful Opportunity Funds program students with airfare to the United States and a settling-in allowance upon admission to a U.S. HEI. If the pilot is successful, Coca-Cola may consider expanding the program to other Sub-Saharan African countries.

Foreign Government and Private Funding

Funding from governments in Sub-Saharan African countries is rare. Botswana is one of the few countries where students have access to funding for study abroad, including in the United States. The Debswana Diamond Company of Botswana provides funding through its Top Achievers Scholarship.

Regional Economics and Market Demand

Many African economies have been growing steadily over the past decade. Economic gains over this period point to a growing middle class able to afford their children's university education.

The African Economic Outlook 2020 report underscores the importance of developing education and skills to advance economic growth. The report concludes that to better prepare for current and future growing employment categories, Africa needs to build skills in STEM, health, education, and communication technology. Other reports note current and fast-growing employment categories, including agriculture, infrastructure, mining, the service sector, banking and finance,

entrepreneurship, transportation and logistics, and entertainment and tourism. The World Economic Forum's *The Future of Jobs and Skills in Africa* report predicts that work will shift toward automation and knowledge-intensive tasks.

Regional EducationUSA Events

The first annual EducationUSA Africa College Fair Tour, planned for August-September 2020, was postponed. For updates, visit the "Find an Event" page at <https://educationusa.state.gov>.

U.S. Study Abroad in the Region

The number of U.S. students studying in Africa increased in AY 2018-2019 to 14,416, a 7 percent increase over the previous year. South Africa hosts 42 percent of the U.S. students studying in Sub-Saharan Africa, followed by Ghana, Tanzania, Kenya, Uganda, Rwanda, Zambia, and Senegal.

EducationUSA advising centers welcome the chance to host American study abroad students who can attend sessions as student ambassadors to promote their U.S. institutions and share information about U.S. college life.

In 2019, U.S. embassies in Ethiopia, Malawi, South Africa, Tanzania, and Uganda received Study Abroad Engagement Grants from the USA Study Abroad Branch at the Bureau of Educational and Cultural Affairs to carry out capacity-building projects to promote Americans studying in Africa.

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 may vary from year to year, so please contact the EducationUSA adviser in your country of interest for the current year's dates.

Virtual sessions can be planned with advisers when students are available. These sessions usually focus on *Your 5 Steps to U.S. Study* from EducationUSA, with individual HEI representatives or as a panel discussion.

East Asia and Pacific

Regional EducationUSA Profile

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

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EducationUSA Advising Centers in the Region

29 Comprehensive
22 Standard
10 Reference

EducationUSA advising centers in East Asia and the 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 background. Advising centers are located at an array of venues, including U.S. embassies and consulates, Fulbright Commissions, and American Corners, as well as local universities, libraries, and non-governmental organizations (NGOs). Three EducationUSA Regional Educational Advising Coordinators (REACs) cover this large region, and more than 80 EducationUSA advisers provide guidance and regional expertise to prospective students, U.S. higher education institutions (HEIs), and other stakeholders.

Regional Overview

The EAP region encompasses 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. In AY 2018-2019, 537,181 students from this region attended U.S. universities and colleges. The region accounts for approximately 49 percent of all international students in the United States, and the number grows each year. Although AY 2018-2019 saw positive growth, the growth rate has slowed as competition for internationally mobile students has increased across the region and beyond.

Recent Trends

The region experienced tapered growth in AY 2018-2019 after a steady increase in student mobility over the previous five years. While interest in the American higher education sector remains high, affordability is a constant concern among students and families. In

addition, competition for international students is increasing, and there has been a rise in closer higher education options, specifically in China and Australia. 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 and Areas in the Spotlight

Australia. With nearly three decades of uninterrupted economic growth and consistent development in the international education sector, Australia is a major sender and recipient of international students. The 2019 *Open Doors* report ranks Australia 30th in sending students to the United States and eighth in receiving U.S. study abroad students. Nearly 50 percent of Australian students in the United States are studying at the undergraduate level, with many drawn to the U.S. campus lifestyle, which contrasts with the commuter lifestyle of Australian universities.

Opportunities for athletic scholarships and sports programs at all levels of competition are popular among Australian students, and Australia is the fifth largest sender of National Collegiate Athletic Association (NCAA) eligible athletes to the United States. The graduate market in Australia is largely untapped and is an area that has growth potential, particularly given the number of international students pursuing undergraduate degrees in Australia and the substantial increase in the number of fully-funded Fulbright Scholarships being offered.

A well-planned recruitment schedule should leverage both Australia's proximity



to other growing markets in the region, including New Zealand and Indonesia, and opportunities for recruitment visits to countries in the region, such as Japan, the Republic of Korea, Singapore, Vietnam, and others with direct flights.

Burma. According to *Open Doors* data, the number of Burmese students studying in the United States rose from 807 students in AY 2011-2012 to 1,773 students in AY 2018-2019, more than doubling over eight academic years. In 2019 alone, the number of Burmese students studying in the United States increased by 13 percent. Interest in community colleges has been a contributing factor to the rise of Burmese students pursuing higher education in the United States. With the growth of private colleges and universities in Burma in recent years, students have become increasingly focused on a broad spectrum of graduate offerings as well, with Master of Business Administration programs among the most popular.

The U.S. Agency for International Development (USAID) recently launched the Lincoln Scholarship Program to identify promising young Burmese leaders from diverse backgrounds. This program is expected to provide 100 fully-funded

Master's degree scholarships to U.S. institutions over the next three years. For students who self-fund, the perceived high cost of studying in the United States remains a barrier. Therefore, many self-funded students tend to seek less expensive options that are available within the Association of Southeast Asian Nations (ASEAN) region.

Cambodia. As Cambodia continues to enjoy rapid economic development, a larger proportion of Cambodian students are able to afford higher education abroad. The number of high-quality, private international high schools in Cambodia that prepare students to meet U.S. college and university academic entrance requirements is growing. Although interest is exceptionally high among students, affordability is the main barrier for student mobility to the United States. Regardless, the number of Cambodian students in the United States rose from 659 students in AY 2017-2018 to 685 students in AY 2018-2019, representing a 3.9 percent increase according to *Open Doors*.

More impressive is the year-after-year growth, which more than doubled the number of Cambodian students studying in the United States since AY 2011-2012. Much

of this growth is thanks to community college opportunities and four-year degree-granting institutions with strong 2+2 articulation agreements. These types of programs attract students' attention because of their access and affordability. *Open Doors* data confirmed that 29 percent of international students from Cambodia attended community colleges in AY 2017-2018. The top three host states for community college students from Cambodia were California, Texas, and Washington.

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 1.7 percent increase in students studying in the United States according to AY 2018-2019 *Open Doors* data. While the year-after-year percentage increase in student mobility is slowing, the AY 2018-2019 total of 369,548 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 2018-2019," China sends the most students worldwide for undergraduate and graduate studies, and Optional Practical Training (OPT). Science,

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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 the humanities.

The number of Chinese students taking non-degree programs fell by 5.4 percent, likely as a result of increased competition from other countries. Chinese students interested in overseas education have more choices than they have had 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 of students 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 fifth 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 five concerns for Chinese students studying abroad are campus safety, cost of tuition, job opportunities, perception of anti-Chinese sentiment in the United States, and college rankings.

Hong Kong. Although the number of Hong Kong students has fallen over the past two years, Hong Kong is still ranked 26th in sending international students to the United States. Traditionally, the majority of Hong Kong students considered only domestic institutions or a handful of well-known foreign universities, but due to increased levels of difficulty introduced into the Diploma of Secondary Education exam and a number of other factors, both prospective and currently enrolled students are seeking higher education options outside of Hong Kong. EducationUSA Hong Kong is seeing an increase in inquiries about various U.S. study options, including boarding high schools, community colleges, and institutions accepting transfer students.

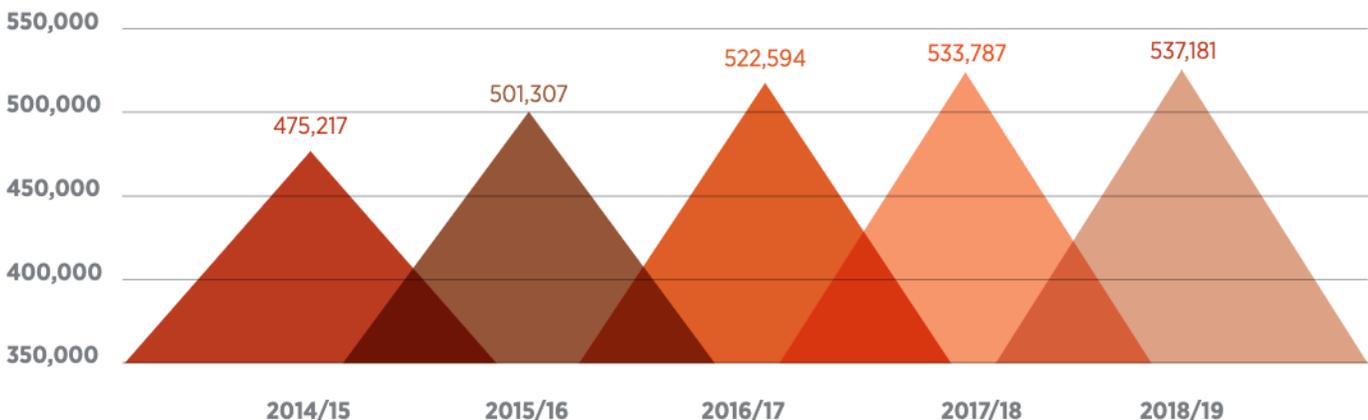
Nevertheless, the United States is not the only destination that will benefit from the current trends in Hong Kong. As residents of a former British colony, Hong Kongers are familiar with the UK education system and have favored the United Kingdom as the top destination for study abroad for many years. However, as more Hong Kong students seek to leave the city, the United States is in a good position to meet the growing demand with its wide range of college options, including community

colleges and short exchange programs that are highly flexible with their entry requirements.

Indonesia. Indonesia is the fourth most populous nation in the world, with a population of more than 270 million, yet the total number of Indonesian students studying in the United States has remained relatively low, presenting significant potential for growth. As rapid economic growth continues, more Indonesian families are able to afford the cost of study abroad. With K-12 education infrastructure expanding across the country, a variety of alternative and nontraditional schools offering a blend of local and international curricula have emerged. It is important for U.S. institutions to explore and connect with the various types of Indonesian schools beyond international schools to fully tap into this enormous student market.

In AY 2018-2019, the number of Indonesian students in the United States declined by 3.4 percent, according to *Open Doors*. While student mobility numbers declined for both undergraduate and graduate study, the number of students undertaking OPT increased by 9 percent, continuing the growth curve from the prior year. The overall declining numbers are a result of a combination of factors, including varied eligibility for government scholarships, high tuition at U.S. institutions, and competition from other countries. Australia in particular is a strong competitor, because of its proximity to Indonesia, simplified college application process, and provision for

Student Mobility in the Region (Five-Year Trend)



international students to work in the country while pursuing their degree.

Japan. After years of steep decline, the number of Japanese students studying in the United States has steadied, and Japan is currently the eighth largest sender of international students to the United States. America is the top destination for Japanese students, followed by China, Taiwan, and the United Kingdom. The Japanese Ministry of Education, Culture, Sports, Science, and Technology (MEXT) set a goal of sending 120,000 Japanese university students and 60,000 high school students overseas by 2020 through joint efforts by government, industry, and academia as part of the Japan Revitalization Strategy policy agenda. According to 2018 Japan Student Services Organization (JASSO) data, 115,146 university students studied abroad, including in the United States in 2018.

According to MEXT, the number of high school students who studied abroad in 2017 on short-term programs rose by more than 10,000 from FY 2015 to reach approximately 47,000—a record since the ministry began conducting a survey on international exchange. The number of high school students who participated in overseas school trips also increased by about 15,000 during the same period, for a total of 179,910.

MEXT has implemented an array of projects, some in partnership with the private sector, to encourage universities to internationalize and to imbue the next generation of leaders with global competencies. The "TOBITATE! Young Ambassador Program," launched in 2014, is a scholarship program supported by the private sector (246 companies and associations) for study abroad of up to two years that includes a focus on practical training. A total of 5,116 university students and 2,685 high school students have studied abroad on this program as of 2019. Other key projects include the Top Global University Project, through which MEXT has selected 37 universities and allocated 10-year special budgets for supporting university reform toward internationalization from 2014 to 2023. The Inter-University Exchange Project, beginning in 2011, offers MEXT support to 10 Japanese universities that are developing or conducting international student exchange programs with partner

universities to increase the number of student exchanges through these quality-assured programs. The Collaborative Online International Learning (COIL) program also launched in 2018, targeting study in the United States.

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. Short-term university exchange programs and internships are growing areas of attention for future development in the Japanese market. The government also established a joint degree scheme for inter-university agreements in 2015.

Mongolia. According to the Ministry of Foreign Affairs of Mongolia, as of 2019 the United States was the third most popular destination for Mongolian students, behind the Republic of Korea and China. More than one-third (34.9 percent) of the Mongolian population is between the ages of 15 and 34. The Mongolian government has issued policy directives to support overseas education for Mongolian students and to invest in both traditional and high-tech industries to promote the country's socioeconomic development. In 2018, the Government of Mongolia spent approximately USD\$9 million on overseas higher education opportunities to fulfill human resource shortages in developing industries.

Since the mining boom in Mongolia started in 2008, parents have recognized English language skills as crucial for employment opportunities not only within Mongolia, but also in the global job market. As a result, high school students in Mongolia have a good understanding of standardized tests such as the TOEFL and the SAT, and there are many language training centers and schools with an American or international curriculum. Cost, availability of scholarships, and employment opportunities are major factors Mongolian students consider. The country is a promising market for community college 2+2 programs.

New Zealand. According to UNESCO, the United States is the most popular study abroad destination for New Zealanders, recently surpassing Australia. Student flow

from New Zealand to the United States is trending upward, with a 38 percent increase in the last five years. Much of the increase is attributed to students pursuing undergraduate degrees and OPT.

The opportunity to play sports on campus is a key driver for many undergraduate students. New Zealand is a top 10 sending country for student athletes to the United States and sends the second most student athletes to the NCAA per capita after Canada. New Zealand hosts two annual conferences that may interest U.S. institutions: the New Zealand International Education Conference in August and a Careers and Transition Education Association (CATE) conference in November.

Papua New Guinea. *Open Doors* showed an increase in AY 2018-2019 in the number of students from Papua New Guinea, Solomon Islands, and Vanuatu studying in the United States. All three nations experienced a rise in undergraduate- and graduate-level students studying in the United States, and Papua New Guinea showed an increase in non-degree and OPT students as well. Steady projected growth in Papua New Guinea's gross domestic product (GDP) in the coming years suggests that more students may be able to afford to study abroad. Papua New Guinea students are also currently studying in Australia, China, India, New Zealand, Philippines, and Turkey. Many students consider Australia and New Zealand for their flexible application process and proximity to home.

Considering Papua New Guinea's population of more than 8 million, the growing U.S. presence in the South Pacific, and limited U.S. higher education recruitment presence to date, there are many opportunities for engagement. STEM, business management, theological studies, and education are popular fields of study, and local universities are searching for joint degree programs, research collaborations, and student and faculty exchanges with U.S. institutions.

Philippines. The number of students from the Philippines studying in the United States increased by 2.9 percent (to 3,320 students) in AY 2018-2019. The growth is mainly attributed to the 26.2 percent increase in the number of students enrolled in OPT. There was also healthy growth

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in the number of graduate students, representing a 6.6 percent increase, while the number of undergraduate students remained nearly flat, with a 0.7 percent decline. The number of students in non-degree programs sharply decreased by 34 percent, but non-degree students make up only 2.9 percent of all Filipino students in the United States. The Philippines is the second most populous country in Southeast Asia, with a population of almost 110 million, more than 50 percent of whom are under the age of 24, and English is the official language. The Philippines' recently completed transition from a K-10 to a K-12 education system and noticeable growth in schools offering AP and IB curricula have further expanded the pool of Filipino students ready to pursue international higher education opportunities. Given this opportune context for student recruitment, U.S. HEIs may wish to refocus their strategic enrollment efforts in the Philippines.

In-person engagement is important to students and parents in the Philippines. With competition from other countries on the rise, U.S. institutions are well-served by sustained recruitment strategies. China in particular is increasing the number of scholarships available to students from the Philippines. U.S. university alumni associations and coalitions, like CAUSE Philippines (the Coalition of American University Student Experiences: Philippines) 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, nonprofit 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. Business and management, engineering and technology, humanities, social sciences, and communications, as well as health-related fields, remain top fields of study. The Philippine government, through its Commission on Higher Education, has prioritized the internationalization of the higher education system, with particular interest in increasing linkages and exchanges between U.S. and Philippine institutions. To this end, robust, ongoing collaboration between the U.S. and Philippine governments is supporting this goal.

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). According to 2019 statistics released by the Ministry of Education, the number of students from the Republic of Korea in the United States surpassed the number in China in AY 2018-2019. Affordability of a U.S. education, employability, and issues related to safety and security are common concerns among students from the Republic of Korea.

In 2020, the Ministry of Education launched a new project funding graduate programs that partner with U.S. universities to offer 1+1 dual graduate degrees, particularly in the fields of math, science, and special education. This program allows graduate students to study one year in

the Republic of Korea and one year in the United States and earn a Master's degree in both countries.

The Ministry of Education also announced its intention to increase the number of students from the Republic of Korea enrolled in higher education overseas, including in the United States, and to offer study opportunities for students from low-income households. The resulting short-term study program, called Paransadari, is managed by the Korea Student Aid Foundation (KOSAF, www.kosaf.go.kr). It offers students from the Republic of Korea the opportunity to participate in four-week programs or language courses at universities worldwide.

Opportunities for U.S. institutions to effectively recruit in the Republic of Korea lie in sustained engagement, diversification of outreach, active community college promotion, and mobilization of alumni and current students. The Republic of Korea is a premier market for e-sports, which are extremely popular locally. Outreach beyond the capital is lacking, and niche markets, such as visual and performing arts and sports, are strong areas of opportunity.

Taiwan. The total number of students from Taiwan enrolled at U.S. colleges and universities increased for the third year in a row in AY 2018-2019. Taiwan was the seventh largest source of international students in the United States for a fourth consecutive year. According to the 2019 *Open Doors* report, there were 23,369 students from Taiwan enrolled at U.S. institutions, an increase of 4.1 percent. During AY 2018-2019, the largest cohort

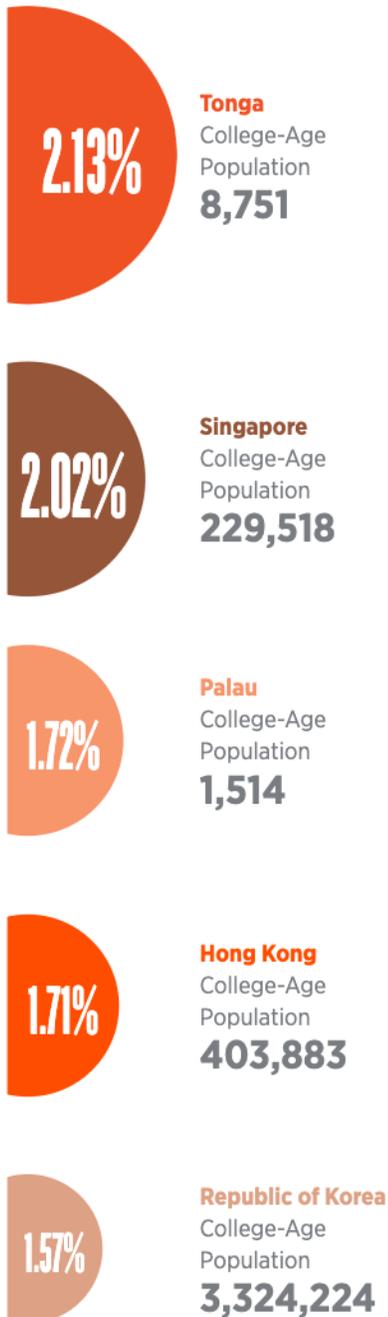
Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students in the Region (Five-Year Trend)

Country	2014/15	2018/19	%Change
Samoa	21	103	390.5%
Tonga	95	186	95.8%
Burma	1,067	1,773	66.2%
Cambodia	492	685	39.2%
Vietnam	18,722	24,392	30.3%

390.5%

Samoa 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: 2017 Population of the official age for tertiary education, both sexes

of students from Taiwan in the United States (40 percent) was enrolled in graduate study. More than 31.1 percent of all students from Taiwan in the United States were undergraduates, a 3.7 percent increase over the previous year. According to the U.S. Department of Commerce, international students from Taiwan contributed USD\$902 million to the U.S. economy from 2018 to 2019.

On December 6, 2018, the Taiwan Cabinet approved a blueprint proposed by Vice President-elect William Lai to make Taiwan bilingual by 2030. The 2030 goal is the latest version of Lai's October 2018 policy to promote English as a second official language. Cabinet-level agencies and the National Development Council, which leads this plan, will focus on making information and services provided to foreign nationals available in English. An initial focus will be on launching English-only instruction for younger level students within the next 8-12 years and training teachers to use English as a medium of instruction.

Vietnam. Vietnam is the top Southeast Asian sender of students to the United States, with 24,392 Vietnamese students pursuing higher education at U.S. schools according to *Open Doors* AY 2018-2019 data. Since AY 2015-2016, Vietnam has held the rank of sixth place among country senders worldwide. Vietnam experienced a 0.3 percent increase in student mobility to the United States during AY 2018-2019—a much smaller percentage increase than the year prior, signaling a flattening growth trend. Business and management, along with STEM, are the top fields of study among Vietnamese students.

According to World Bank statistics, Vietnam's total population reached 97 million people in 2019. Considering that approximately 70 percent of Vietnam's population is under the age of 35, there is a keen focus on developing a well-trained labor force in the country. Education and training are top priorities for the Vietnamese government, which will require a labor force that is equipped with scientific, technological, and managerial skill sets. While many local universities may not have the capacity to fully commit to institution-wide partnerships, smaller-scale partnerships, such as student exchanges and faculty-led programs, may

prove mutually beneficial as a starting point for collaboration.

What to Expect in the Next Three to Five Years

- EAP has numerous established and emerging international education hubs, and internationalization is a major goal of many institutions in the region, particularly in countries facing low population growth and decreasing student numbers. Among the robust higher education offerings in EAP are English-based courses and degree programs, foreign branch campuses, and simplified processes for exchanges within the region and beyond. Generous scholarships and relatively inexpensive costs are major considerations for students when thinking about study abroad, whether for exchange or a degree. Australia, China, Hong Kong, the Republic of Korea, Malaysia, Singapore, Thailand, and New Zealand are countries that have proven themselves as prime destinations for international students seeking higher educational opportunities within the region.

- 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 a half million, 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

Regional Student Totals Top Five Countries of Origin

Country	2018/19	% Change
China, People's Rep of	369,548	1.7%
Rep of Korea	52,250	-4.2%
Vietnam	24,392	0.3%
Taiwan	23,369	4.1%
Japan	18,105	-3.5%

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- economy,” and the government allotted USD\$470 million to support international student recruitment in 2018.
- As the availability of English language training in the region continues to be a challenge for English as a Second Language (ESL) program recruitment in the United States, opportunities beyond the ESL classroom and programs that allow for a smooth transition into degree programs may attract students to the United States.
 - The Japanese government has implemented English language education reforms to foster students’ speaking, writing, listening, and reading skills and improve their communicative English language skills. Starting in April 2020, English will be an official subject in primary school beginning in the fifth grade, and secondary school teachers will be required to teach English classes in English. The Japanese government is also considering proposals to incorporate into university entrance exams tests to assess speaking and writing skills in addition to listening and reading, with the goal of establishing a new exam system policy by the end of 2020. These policies may lead to increased demand for communicative English language teaching programs.
 - Nine of the top 25 sending countries to U.S. community colleges, including the top four—China, Vietnam, Japan, and the Republic of Korea—are in the EAP region. The most recent *Open Doors* statistics show that EAP sends 47.6 percent of the total international community college population in the United States. Burma, Cambodia, Laos, Malaysia, Mongolia, the Philippines, and the Pacific Islands are also promising markets for U.S. community colleges. The number of students from Kiribati and Tonga increased by 57 percent and 10 percent respectively, according to the most recently available statistics from *Open Doors*.
 - Government initiatives to develop human resources and promote globalization constitute an increasing trend across EAP. Many countries in EAP have international schools, International Baccalaureate (IB) schools, and other special purpose schools that have the potential to prepare students for academic programs abroad. School systems can follow an international curriculum or be a hybrid of international and ministry of education systems. High school counselor and teacher training at these schools will be an opportunity to increase local capacity to support students seeking to study abroad.
 - 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 levels continues to grow. While the pool of potential students is growing throughout the country, the fastest growth appears to be in first-, 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 1,168 in 2018. There is an increasing number of these schools in first-tier cities (such as Beijing and Shenzhen) and second- and third-tier cities (such as Dongguan, Hefei, Nanjing, and Tianjin).
 - Demand for OPT programs will grow in the EAP region, and some institutions have mandated international experience for specific coursework and disciplines.
 - Student mobility from Southeast Asia to the United States is starting to level off after years of trending upward. Affordability is a key concern for students, and options such as community college programs are generating increased awareness and interest. With increased competition in the region, it is imperative that U.S. institutions prioritize in-person recruitment visits.
 - 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. The Commission on Higher Education (CHED) in the Philippines has prioritized the development of institutional partnerships that focus on community college initiatives and peace education. In addition, local institutions consistently express interest in practicum programs abroad and student exchanges.
 - An average of 1.5 million Vietnamese citizens have joined the global middle class each year since 2014, according to the World Bank, and Vietnam’s real GDP has been experiencing positive growth that is projected to continue through 2024. The names of many U.S. universities and colleges are becoming widely known due to joint programs with Vietnamese academic partners, in-country offices, and participation in education fairs. After 18 years of continued growth in the number of students pursuing higher education in the United States, Vietnam has many U.S. alumni who are keen to promote U.S. studies among their relatives, friends, and colleagues, and within their communities. The Vietnamese government has prioritized the improvement of higher education quality, increased budget allocations for education, liberalized private sector involvement, and invited foreign participation in the development of education and training services.
 - The Thai Ministry of Education plans to increase English language STEM education in secondary schools across the country. English language and STEM education are priorities for Thailand as the country moves toward its Thailand 4.0 initiative. Science, technology, engineering, the arts, and mathematics (STEAM) education has also been identified as a national priority, and the arts have gained considerable interest from prospective students. Students in Thailand see ESL as a pathway to enter U.S. institutions. In addition, there has been an increasing number of 2+2 program agreements between Thai and U.S. institutions. Thai students’ interest in U.S. education is due in part to the opening of the ASEAN Economic Community, which has encouraged students to develop cross-cultural communication and English language skills.
 - The growing presence of the United States in the South Pacific, and the physical and soft infrastructure promised by the completion of a U.S. Marine base

by 2024, will increase mutual interest in Papua New Guinea, neighboring islands, and other parts of Oceania.

Virtual Engagement and Social Media Usage

Internet access and the use of smartphones have become both mainstream and affordable in EAP. 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, Facebook, YouTube, and Instagram are favored options in most EAP locations. China, where WeChat, Sina Weibo, and QQ Space dominate, serves as an outlier. High-speed internet is common in EAP and available in most homes, cafes, and restaurants, and many public spaces, especially in city centers. Both China and the Republic of Korea are leading the implementation of fifth-generation wireless systems (5G), with other countries, such as Thailand, following suit. The Thailand National Broadcasting and Telecommunications Commission announced that the country may soon be the first in the ASEAN region to fully adopt the 5G network.

U.S. institutions interested in reaching students virtually are encouraged to contact EducationUSA centers for guidance on the most effective strategies. U.S. schools are encouraged to add EducationUSA country teams on Facebook and other social media platforms so that centers can share content when appropriate. In addition, U.S. schools can always tag the main EducationUSA social media handles and the hashtags #EducationUSA and #EdUSA.

For U.S. HEIs that would like to highlight scholarship opportunities at their respective schools, EducationUSA recommends using the hashtag #ScholarshipAlert. In addition, schools may post their scholarship information on the EducationUSA website after they create accounts for their respective institutions.

Even emerging student markets in EAP are becoming increasingly connected via social media, and recent infrastructure upgrades have greatly improved internet speeds across the Pacific Islands.

Improved connectivity and COVID-related restrictions on gathering have resulted in expanded virtual engagement in the region. For example, American Spaces have recently hosted virtual sessions connecting U.S. HEIs, students and teachers, and local universities. The region is also seeing increased interest in online university degrees.

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

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. Video content is particularly appealing to international students in the EAP region, especially if the content includes current students and/or recent alumni from the region. For example, in Vietnam, YouTube has recently surpassed Facebook as the most widely used social media platform in the country. U.S. HEIs can highlight points of interest on campus, insights on student life, and engaging school activities that may appeal to prospective students. If schools are able to use a chat feature like Facebook Messenger or consistently track comments on video content via the comment box, representatives can better answer questions and provide guidance on promotional resources for students to further research.

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

U.S. Study Abroad

Top Five Receiving Countries in the Region

Destination	2017/18	% Change
China, People's Rep of	11,613	-2.5%
Australia	10,332	-0.7%
Japan	8,467	12.4%
Republic of Korea	3,929	4.2%
New Zealand	3,885	2.9%

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
Indonesia	508	825	62.4%
Japan	5,978	8,467	41.6%
Thailand	1,919	2,482	29.3%
New Zealand	3,021	3,885	28.6%
Philippines	329	409	24.3%

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media platforms—such as Facebook, Instagram, Twitter, and YouTube, as well as Google products—are blocked in China. EducationUSA encourages U.S. institutions to employ the Chinese social media equivalents of these blocked platforms to reach Chinese students and parents. The majority of the Chinese population is active on mobile devices, and WeChat and QQ Space are currently the most popular social media platforms available on smartphones. Sina Weibo also holds a strong market share among Chinese social media users. Livestreaming (for example, TikTok) is popular among young people in China, and content from many educational programs is streamed to reach the widest audience possible.

The use of Facebook, Instagram, and YouTube 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 widely used, and many U.S. institutions have taken advantage of Kakao Talk's useful outreach features, including the open chat room, which can be used to communicate with prospective and admitted students. Among Japanese students, the top social networking service is LINE, a text messaging platform that averaged over 80 million active monthly users in Japan in 2019. Twitter is the second most popular platform, followed by Facebook, and YouTube is the most popular video-sharing site. Instagram is steadily growing in popularity.

Many EducationUSA centers in EAP promote events through center or embassy websites, and some offer opportunities for U.S. institutions to connect with students virtually and archive videos of these engagements for future viewing on demand.

Successful Recruiting Strategies

- Provide detailed 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 to ensure that students can determine the feasibility of an educational opportunity and that the student and family have accurate financial information.
- Highlight campus safety and student services. Safety is a major concern for parents. Information on specific campus services may alleviate concerns and dispel misconceptions about U.S. campus life.
- Provide specific and updated information about student internships, work study, and other opportunities such as OPT and Curricular Practical Training (CPT), and connect them to employability with alumni testimonials. Graduate students are especially interested in gaining laboratory, research, and teaching experience. EAP students largely lack awareness of OPT and CPT opportunities, and best practices when seeking OPT.
- 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 options. When attending educational fairs in the region, community colleges should consider having a presence next to the four-year degree-granting institution with which they have an articulation agreement, so students have an opportunity to ask questions to both recruitment representatives and fully understand the power and benefits of the 2+2 model.
- 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.
- Target a wider range of EAP students in promotional materials. Representation of students and alumni from EAP is noticeably lacking in U.S. institution promotions and marketing materials. Create video testimonials to share success stories of alumni or currently enrolled international students. Content in the local language or with translated subtitles will resonate with the local population. EducationUSA centers may highlight this content on center social media pages.
- Recognize that in-person recruitment in the region is a must. Investment in sustained engagement over time builds trust and name recognition and 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 as virtual resources, since parents may be less proficient in English.
- 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 counselors share information with their students.
- 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. Fiji, for example, has more than 60,000 high school students who receive instruction in English, yet it receives almost no U.S. higher education engagement.
- Target niche areas such as arts, law, sports, and STEAM. For many fields, a foreign degree, especially one from the United States, is highly valued. Other than Australia and New Zealand, sports recruitment in EAP is largely unexplored.

Institutional Partnerships

- Institutions in the region, particularly those seeking to diversify their campuses, are interested in both sending and receiving international students, American or otherwise. Region-wide, there are periodic conferences focused on various aspects of higher education. The annual Asia-Pacific Association for International Education (APAIE) conference is a major event focused on partnerships with institutions in the region, though in recent years it has been well-attended by universities from other regions as well.
- Most countries have local organizations comprised of HEIs and higher



education administrators. There may be local chapters of NAFSA, TESOL International Association (formerly Teachers of English to Speakers of Other Languages), technical colleges, and other organizations that offer contacts or hold events.

- Singaporean universities actively seek opportunities to build partnerships with foreign institutions. Singapore enjoys a strong partnership model predominantly with British and Australian universities, but the Ministry of Education is keen to explore innovative collaboration with American institutions as well. STEM and computer science programs tend to be popular areas of focus for university partnerships. When communicating with individual universities or Ministry of Education officials, U.S. institutions are encouraged to highlight specific features of their programs that not only address Singaporean market demand but also demonstrate an edge over competing institutions from other countries.

- Since education and training are top priorities for the Vietnamese government to ensure a well-trained labor force, U.S. institutions may wish to capitalize on this. As mentioned previously, while many local universities may not have the capacity to fully commit to institution-wide partnerships, smaller-scale partnerships (such as student exchanges and faculty-led programs) may prove mutually beneficial as a starting point for collaboration.

- Education exchange cooperation is gaining momentum in the Philippines, with local institutions consistently expressing interest in practicum programs abroad and student exchanges with U.S. colleges and universities. CHED has expanded its efforts to develop institutional partnerships with U.S. HEIs, focusing on community colleges and peace education. Notably, CHED sent delegations of government officials and Philippine university presidents to NAFSA in 2018 and 2019 to build new educational partnerships. Locally,

CHED has been closely collaborating with EducationUSA Philippines to conduct an annual seminar series on institutional partnerships for local university presidents and other high-profile stakeholders. U.S. institutions are encouraged to take advantage of recurring international and local opportunities to connect with CHED and Philippine institutions, and EducationUSA can serve as a point of contact.

- New Zealand hosts two annual conferences that may be of interest to U.S. institutions: the New Zealand International Education Conference (NZIEC) in August and a Careers and Transition Education Association (CATE) conference in November.
- In the Marshall Islands, Micronesia, and Palau, the highest level of education is a degree from a community college. As the college system and curricula are based largely on the U.S. model, U.S. institutions may wish to pursue transfer agreements. Scholarships are available

East Asia and Pacific



for transfers, and students do not need a visa to work, study, or travel to the United States.

Foreign Government and Private Funding

Brunei. The government of Brunei continues to offer fully-funded scholarships overseas at both undergraduate and graduate levels. The age limit for potential graduate scholars has been lowered from 40 to 35. Most recipients of the government scholarships are required to work for the government for a minimum of six years following graduation, restricting them from participating in post-study work programs such as OPT.

In addition to scholarships, 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 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.

Burma. The Lincoln Scholarship Program is funded by USAID and reserved for graduate studies in the United States. It will benefit approximately 100 young scholars over the next three years. The Lincoln Scholarship Program strives to recruit scholars of diverse ethnicities, religions, genders, and backgrounds, and

offers learning opportunities to acquire technical skills in fields of study such as economics, international relations, public health, and public policy. The aim of the Lincoln Scholarship is to promote a more stable, pluralistic, and prosperous society in Burma through a corps of new leaders (<http://www.thabyay.org/scholarship.html>).

Cambodia. While the Cambodian government does not actively provide funding to students studying abroad, several major scholarship initiatives are active in the country. Leading sources of funding for U.S. study include the Fulbright Fellowship, SHE-CAN (www.shecan.global), and the Open Society Foundations 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 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 Belt and 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.

Indonesia. The Indonesia Endowment Fund for Education (or LPDP, Lembaga Pengelola Dana Pendidikan) is a full scholarship from the Indonesian Ministry of Finance for all Indonesian citizens. LPDP aspires to be the best regional fund management institution to prepare future leaders and encourage innovation for a prosperous, democratic, and just Indonesia. The LPDP service program consists of scholarships, research funding, and fund management (investment). Official information about LPDP is subject

to change, and eligibility requirements for both students and approved institutions should be verified directly with the government office responsible for the program (lpdp.kemenkeu.go.id).

Japan. Japanese government scholarships are offered for degree programs and short-term study abroad under university exchange agreements. The TOBITATE! Young Ambassador Program scholarship is supported by 246 companies and associations in collaboration with MEXT and supports short-term study abroad for both high school and university students (tobitate.mext.go.jp/scholarship). 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. Established in the aftermath of the 2011 Great East Japan Earthquake, TOMODACHI invests in the next generation of Japanese and American leaders through educational and cultural exchanges and leadership programs, as well as through scholarships for study abroad (usjapantomodachi.org).

In Japan, there are many opportunities for support from the private sector. Among them is the Yanai Tadashi Foundation, which offers full scholarships for Japanese students to seek higher degrees at top American and British institutions (the list of institutions is available here: <https://www.yanaitadashi-foundation.or.jp/scholarship/>). Another prominent opportunity is from the Keidanren Business Federation which offers scholarships for both high school and studying abroad for higher education through the United World College Japan National Committee, Keidanren Ishizaka Memorial Foundation and Crown Prince Scholarship (<https://www.keidanren.or.jp/japanese/profile/prince.html>).

Malaysia. The number of scholarships for U.S. study offered by Malaysian companies and government agencies has decreased, 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 and unofficial “Top 50” list of institutions. The Majlis Amanah Rakyat (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 stipends (80 percent tuition coverage) to select students for study overseas. Other scholarships include the Astro Scholarship Award, the Maxis What’s Next Scholarship, CIMB Bank Berhad, and Maybank Scholarship Programme. Certain faith-based organizations in Malaysia are also working toward providing partial scholarships for students who are applying to study the United States.

Marshall Islands, Micronesia, and Palau. The governments of these three countries, in partnership with the United States through Compacts of Free Association, provide scholarships for students to study abroad, often on the condition that they return home to work in their fields following completion of their degree. Students are eligible for U.S. federal funding, including Pell Grants, and are often able to apply for domestic scholarships.

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 Doctoral) students accepted to institutions listed in the *Times Higher Education World University Rankings* Top 500 list and QS World University Rankings. According to the Mongolian Education Loan Fund, MECSS will select 60 to 70 Master’s and Doctoral students for this scholarship program and provide USD\$16,000 per year (www.mecss.gov.mn/scholarship).

Philippines. The Philippine-American Educational Foundation, or Fulbright Commission in Manila, is a nonprofit, bi-national organization responsible for the administration of the prestigious Fulbright Scholarship Program, Hubert H. Humphrey Fellowship, and other educational

exchange initiatives. Grants are awarded on a competitive basis to Philippine and American students, teachers, scholars, and professionals to study, teach, lecture, and conduct research in the United States and the Philippines (fulbright.org.ph/scholarship-programs).

Republic of Korea. KOSAF provides financial assistance to students through grants, scholarships, loans, and work-study programs. The foundation (www.kosaf.go.kr) administers more than 1,000 scholarships for short-term overseas summer programs. It also offers up to 50 scholarships for qualified students from low-income households; these come with up to USD\$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 Government Scholarship for Overseas study offers students up to USD\$40,000 per year to pursue a graduate degree in the United States (bit.ly/KorGovOverseasStudySchol).

Singapore. Singapore has a long history of providing both government and private sector scholarships for overseas study. These scholarships typically cover the full cost of tuition and fees and include a living stipend and airfare. They also 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—such as the Land Transport Authority and Singapore Press Holdings (brightsparks.com.sg)—also offer scholarships.

Taiwan. Taiwan’s Ministry of Education (MOE) and other institutions provide study abroad scholarships for Master’s and Doctoral degree-seeking students (www.scholarship.moe.gov.tw/). The Foundation

East Asia and Pacific

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).

In 2019, under the Taiwan Elite Scholarship, the MOE began selecting 100 outstanding Taiwan Master's students to undertake Doctoral programs at the top 100 universities in the world. The Ministry has budgeted USD\$1.7 million for this scholarship program and planned 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 yearlong internships. Considering the falling numbers of Doctoral students, the MOE plans to provide awardees annual stipends of USD\$7,000 for research and encourage professors to form new start-up companies to engage with students. This initiative has been well-received, and the MOE has received more than 300 applications to date.

Thailand. The Thai government provides more than 500 scholarships per year to Thai citizens under the Royal Thai Government Scholarship Program. The organization hosts its education fair annually in November (www.ocsc.go.th).

Vietnam. The Vietnamese government has taken great strides to improve the quality of higher education in Vietnam. Two new scholarship programs targeting Master's and Doctoral-level study have replaced previous government initiatives.

Project 2395 is a professional development training program that will take place from 2021 to 2025 and expand human resources in science and technology. This scholarship initiative, managed by the Ministry of Science and Technology, will train approximately 200 experts and 80 research groups abroad, and provide postdoctoral education to about 200 individuals and 300 government officials in science and technology management.

Project 89 covers a scholarship period from 2019 to 2030 and aims to fund 10 percent of university lecturers in Ph.D. programs



(7 percent overseas and 3 percent in-country); lecturers in Master's programs at universities of art, culture, and sports (both in-country or overseas); short administrative capacity-building courses for local higher education institutional staff with managerial responsibilities; and local lecturers on curriculum development, modern teaching methods, scientific research, foreign languages, and information technology.

The Science and Technology Scholarship Program for Overseas Study for Master's and Doctoral degrees is a new private scholarship offered in Vietnam. It is funded by Vingroup and managed by VinUniversity. Vingroup is a joint stock company in Vietnam with a mission to find talented students who have the ability to lead and advance the development of science and technology in Vietnam in the future. From 2019 to 2030, Vingroup will offer up to 100 full scholarships per year for Master's and Doctoral degree programs to Vietnamese students who want to pursue study in key fields in countries with leading science and technology programs, such as Australia, France, Israel, Japan, Russia, Singapore, the Republic of Korea, the United Kingdom, and the United States. (<https://scholarships.vinuni.edu.vn>)

Regional Economics and Market Demand
Brunei faces ongoing economic challenges. Its oil reserves are estimated to run out within two to three decades. The nation's high unemployment rate has become a top concern among Bruneian youth, and the government is paying more attention to technical and vocational education, as these programs are more employability-focused and shorter than a typical undergraduate degree program. U.S. community colleges stand to benefit from the trend of Bruneian students as these students more closely consider their options and return on educational investment.

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 492,185 students in AY 2018-2019, according to the latest figures from the Ministry of Education in Beijing. China is striving to attract more international students as part of a strategic shift from a manufacturing hub to an innovation economy.

With the Malaysian government seeking to develop a pool of highly skilled workers needed in the nation's pursuit

of its fourth industrial revolution, there has been an increase in interest among Malaysian students in STEM graduate studies—particularly artificial intelligence, robotics, and big data. In 2018, the Malaysian government announced its intention to focus future policy efforts on technical and vocational education and training, along with STEM education. Following this trend, U.S. HEIs may want to highlight the strength of American research programs that lead in these fields. While STEM and business will remain the dominant fields of choice for Malaysian students seeking to study in the United States, other subject areas—such as art, design, and social

science—are becoming increasingly popular as well.

U.S. Study Abroad in the Region

The EAP region includes five of the top 25 destinations for U.S. students: China, Australia, Japan, New Zealand, and the Republic of Korea. China is the seventh largest recipient of U.S. study abroad students and the number one receiving country in EAP overall. While China and Australia saw a decline in the number of U.S. study abroad students, the number of U.S. students in EAP increased by 1.25 percent overall from AY 2016-2017 to AY 2017-2018.

The Northeast Asia and the Pacific sub-region saw a 2.3 percent increase in U.S. study abroad. Australia and New Zealand remain strong receivers. These two countries continue to grow in popularity worldwide as study abroad destinations as their governments strengthen international education offerings. The Republic of Korea increased 4.2 percent over the past year, hosting 3,929 U.S. students, and has also emerged as a top recipient of U.S. students. Its popularity will continue to rise as the wave of interest in the Republic of Korea popular and traditional culture increases. Ongoing momentum from the 2018 PyeongChang Olympics will also contribute to this trend. Japan and Hong Kong, popular destinations for U.S. study abroad, also saw gains. Japan had an increase of 12.4 percent, with 8,467 students, and Hong Kong had a 13.3 percent increase, with 1,859 students from AY 2016-2017 to AY 2017-2018.

According to 2019 *Open Doors* data, Southeast Asia experienced a 4.2 percent decrease in U.S. study abroad to the region. This is a reversal of strong increases from 2017, when countries like Burma, Laos, Malaysia, the Philippines, Singapore, Thailand, and Vietnam all saw an increase of American students interested in study abroad opportunities. Only Indonesia and Vietnam showed positive growth in the U.S. study abroad sector for AY 2017-2018, with a sharp 48.6 percent increase in Indonesia and a 7.1 percent increase in Vietnam. In Vietnam, most American students chose short-term exchange programs lasting only one to four weeks, since there are still only a small number of Vietnamese HEIs that have the capacity to create exchange programs for international students. Although Thailand had a 10.2 percent decline in U.S. study abroad for AY 2017-2018, it still hosted the largest number of U.S. students in Southeast Asia (approximately 2,482 students).

In 2019, the U.S. Embassy in Malaysia received a Study Abroad Engagement Grant 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.

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 region. Each year, the specific dates of holidays and exam periods can shift, so please check with local EducationUSA offices or your school counterparts to ensure availability and a productive outreach itinerary.

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

Recruitment travel can be scheduled 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 (February 12 in 2021) 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 is celebrated in Cambodia, and Thingyan is celebrated in Burma.
- Ramadan (fasting month) and a vacation period afterward of approximately two weeks are considerations in countries with large or predominantly Muslim populations, such as Brunei, Indonesia, and Malaysia.
- Chuseok, or Autumn Festival, holidays in the Republic of Korea, China, Taiwan, and other celebrating countries are major closure and travel seasons.
- Major exam periods for high school students in the Republic of Korea are in mid-spring and fall (dates vary from year to year).
- Winter break for high schools takes place from late December to late February in the Republic of Korea; advanced planning and promotion are advised to ensure an audience during this period.
- In Australia, avoid mid-April (around Easter), early to mid-July, late September to early October, and late December to the end of January.
- For the southern Pacific islands avoid late November to the end of January (all schools are closed for summer holidays).
- In Japan, Golden Week (the first week of May) and Obon (the second week of August) holidays are popular times for Japanese domestic and international travel.

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

117

EducationUSA Advising Centers in the Region

37 Comprehensive
34 Standard
46 Reference

In Europe and Eurasia, 117 EducationUSA centers (37 comprehensive, 34 standard, 46 reference) are located at Fulbright Commissions, local non-governmental organizations, universities and high schools, American Councils for International Education 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 there are 151 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 5 percent in the past five years to 90,996 students, according to the 2019 *Open Doors* report. However, this is a slight decrease of 1.8 percent since the 2018 report. Students from Europe and Eurasia account for more than 8 percent of the total number of international students studying at U.S. colleges and universities. The countries with the largest increases in mobility to the United States in the past year are Azerbaijan (14.8 percent), Albania (12.3 percent), and Hungary (10.8 percent). Ukraine and Georgia have had sustained, steady growth over the past five years and have more students in the United States now than at any point over the past decade.

Growth from previous years in some Western European countries—such as Netherlands, Portugal, and Spain—appears to be flattening now. This is due to a variety of reasons: improving economies incentivizing younger people to work instead of study, demography, and perceived barriers to U.S. higher

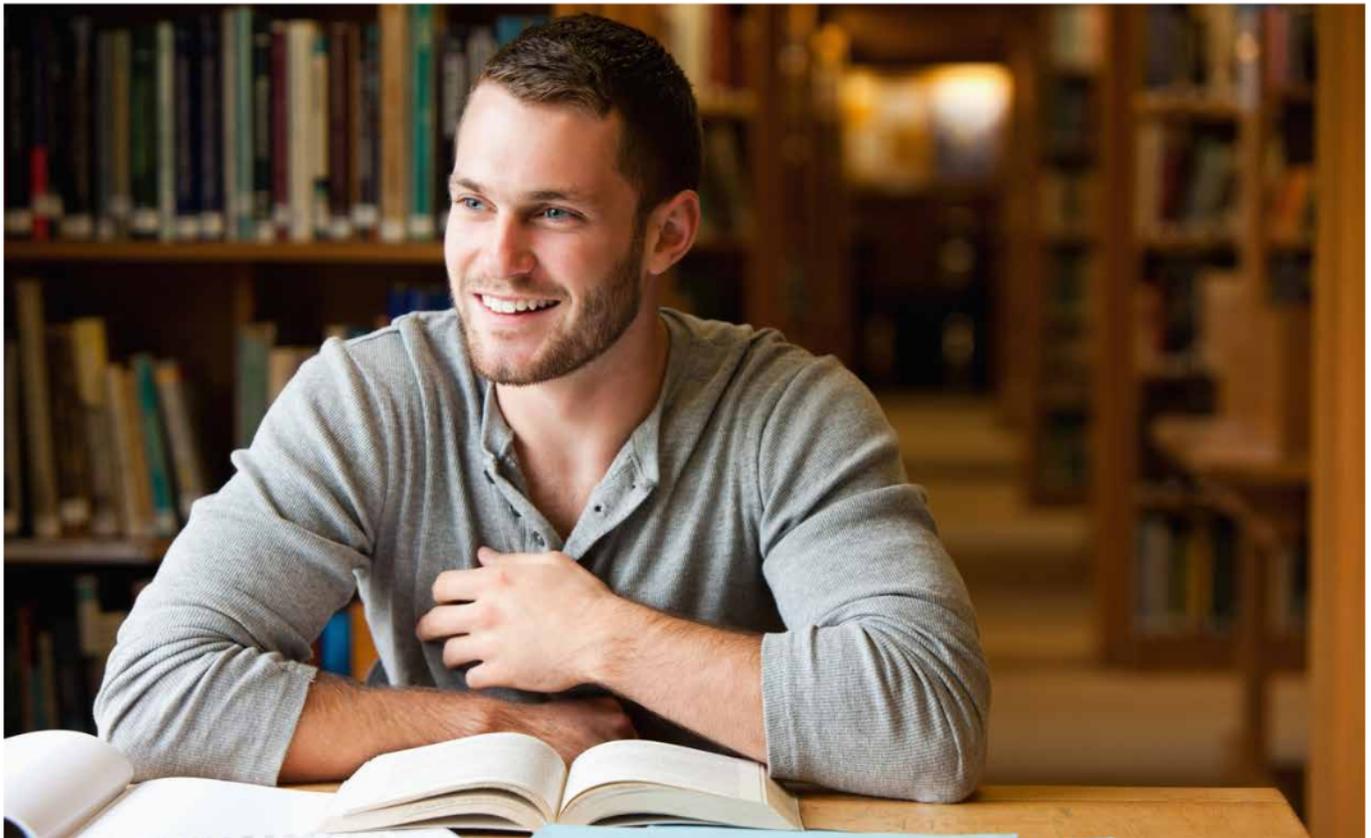
education, such as high cost and safety. The number of students coming to the U.S. from Germany declined notably by 8.5 percent due to many of these factors.

Seventy 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 from the region has increased more than 10 percent, representing 40 percent of all degree-seeking students from Europe and Eurasia. Luxembourg and Azerbaijan saw the greatest percentage increase in the number of undergraduate students from the region. The increase in undergraduate students is especially noteworthy in light of the 4 percent decrease in the population of people ages 15-24 in the region over the past five years (according to Eurostat).

Approximately 6.5 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 Albania (21 percent), Sweden (21 percent), Moldova (18 percent), Ukraine (14 percent), and Poland (10 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 ability to transfer to a four-year U.S. undergraduate program.

The number of graduate students from the region has declined but still makes up approximately 28 percent of the total number of students in the United States from Europe and Eurasia. Factors for the decline include a youth





population decline, an increase in English language programs offered in the region, and increased awareness of and financial support for opportunities in other countries. France, Germany, Italy, Russia, Spain, and Turkey send the largest numbers of students to the United States. Graduate students in the region are particularly interested in science, technology, engineering, and mathematics (STEM) fields, business and management, computer science, and international relations. There is also sustained interest in Master of Laws (LLM) programs, especially in Western Europe, Turkey, and Ukraine.

The standard three-year European Bachelor's degree sometimes complicates students' admission to U.S. graduate programs and semester-long exchanges. As a result, thematic, non-English as a Second Language (ESL) summer programs have gained in popularity. Approximately 16 percent of students from the region are enrolled in non-degree programs in the United States, a number that is expected to grow over the next few years. Close to one-third of German students and nearly half of

the Danish students in the United States are enrolled in non-degree programs. Programs offering only English language instruction are less popular than those offering a broader range of academic credit-bearing courses. As a category, non-degree programs decreased the most in the 2019 *Open Doors* report. However, students from the following countries significantly increased their participation in non-credit programs: Belarus (50 percent increase), Greece (26 percent increase), Ireland (25 percent increase), and Cyprus (21 percent increase).

Cohort advising programs—such as EducationUSA Competitive College Clubs (CCCs) and the Opportunity Funds program—are important fixtures in advising in Europe and Eurasia. CCCs, currently offered in 14 countries in the region, help prepare students for the admission process and U.S. classroom experience. The Opportunity Funds program is available to citizens and officially recognized refugees of 10 countries in the region and provides assistance to students who are academically gifted but unable to afford application fees and tuition at

U.S. institutions. Opportunity Funds can cover the up-front costs of applying to U.S. institutions, and for those admitted with full scholarships, these funds can cover expenses that help the student get to the U.S. campus. Engaging with EducationUSA cohort programs is an excellent way to identify talented students who are a great fit for your institution; Regional Educational Advising Coordinators (REACs) can share details on the variety and types of cohort programs available in the region.

The expansion of the Future Leaders Exchange (FLEX) program for high school students in 2018 is another factor that may begin to influence undergraduate admissions in Europe and Eurasia in the coming years. The FLEX program, a U.S. Department of State youth exchange program administered by American Councils, now operates in 16 countries in the region. The first alumni cohorts return from the Czech Republic, Greece, Hungary, and Slovak Republic in 2020. Six countries in the region participate in the Kennedy-Lugar Youth Exchange and Study (YES) program, which offers a yearlong exchange experience at

Europe and Eurasia

an American high school for students from countries with significant Muslim populations. EducationUSA centers in countries with FLEX and YES programs collaborate on outreach efforts outside capital cities and engage program alumni to promote U.S. education to their peers.

Countries in Central Europe, such as Austria, report sustained interest in high school exchange programs in the United States, even as interest in higher education continues to fluctuate. This is most likely related to the perceived high cost of higher education in the United States. Several reputable organizations facilitate high school exchange opportunities in Austria, and a growing number of families are interested in funding high school exchanges independently. U.S. boarding schools are also becoming more popular, particularly in Serbia.

Recent Trends

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. These policies include measures to increase the number of international students on local campuses, and U.S. higher education institutions (HEIs) can expect to meet students from across the region

and around the world when recruiting in Europe and Eurasia. For example, Russia seeks to nearly double the number of international students from 240,000 in 2018 to 425,000 by 2024. It is also considering granting citizenship to international students who complete degree programs and has removed work restrictions on students during their studies. Beginning in 2020, Russia plans to double the number of full scholarships it offers international students from 15,000 to 30,000.

The cost of U.S. higher education continues to be a perceived barrier to study in the United States since students in the region have access to high-quality, low-cost higher education and generous financial support for study abroad through various programs offered through Erasmus (the European Community Action Scheme for the Mobility of University Students). Currency values have also been a major factor in the region over the past several years, especially the strength of the 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.

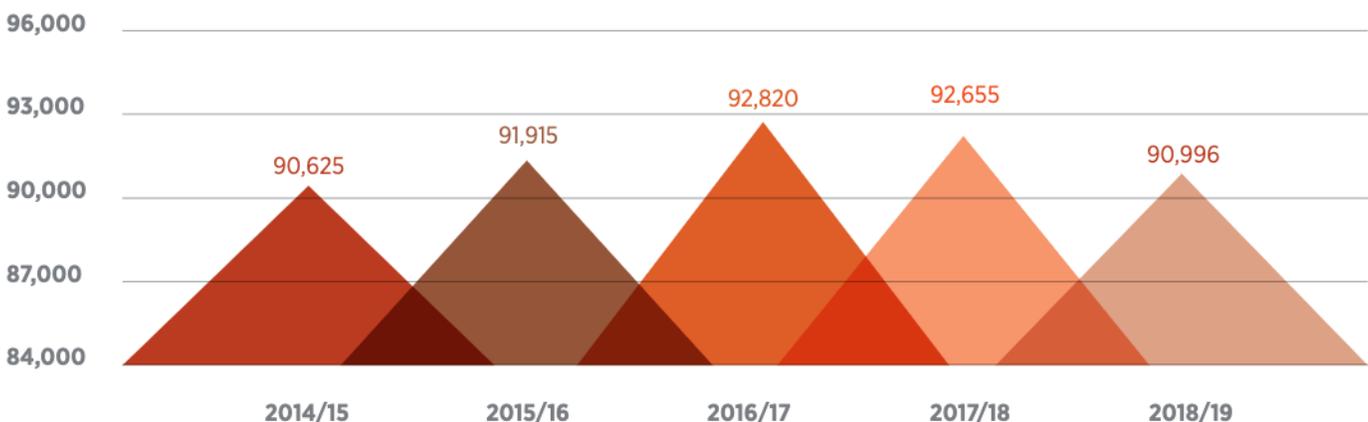
Financial aid for students from certain countries in Europe and Eurasia is

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. While the need to self-fund can be a deterrent against studying in the United States, several local governments have increased their commitment to fund exchanges. In the past year, Albania, Greece, Hungary, and Kosovo have increased their Fulbright contribution to allow more students to study in the United States. The Hungarian government plans to quadruple contributions to the Fulbright Program, which will yield 50 percent more grantees by 2022 and result in more tuition support for Hungarian students in the United States and for American grantees in Hungary. Advisers stay abreast of these changes and are able to provide updated information on these programs.

Even though U.S. tuition and fees are high from a European perspective, there are cost categories in which U.S. institutions are competitive. For example, the cost of living may be less expensive in the United States than in many European capital cities. U.S. HEIs should highlight these affordable options in recruitment materials.

Brexit has loomed large for the region since the referendum in 2016. The final terms of Brexit and the degree to which the UK will participate in the EU's Erasmus Program will have major implications for student mobility across the region and to the United States. Negotiations between

Student Mobility in the Region (Five-Year Trend)



the UK and the EU in 2020 should clarify the impact of Brexit on international student mobility. The UK continues to maintain a large recruiting presence throughout the region as the premiere destination in Europe and Eurasia for students from the region who wish to study in an English-speaking country.

Students and parents are closely watching how Brexit will impact students' access to education in the UK. Increased fees, difficulty obtaining visas, and regulations limiting work would likely encourage students to look elsewhere for opportunities to study in English, including those in the United States or in other countries on the continent with a steadily increasing number of English language programs. Students in the Baltic countries, Bulgaria, and Poland have been particularly focused on changes related to Brexit, and advisers in Cyprus and the Czech Republic report an increase in the number of inquiries about studying in the United States due to Brexit. The UK has itself consistently been one of the largest sending countries to the United States.

However, there are geopolitical and demographic headwinds. Recent uncertainty about Brexit has significantly weakened the pound. The undergraduate student population, and increasingly the graduate degree-seeking population, continues to decline following a drop in birth rates between 1999 and 2004. These shifts have created a surplus of UK university seats and a buyer's market for prospective international students.

European students are increasingly aware of and interested in OPT and J-1 internship programs. It is difficult for students from the region to gain practical work experience in their career field while studying in Europe, so participation in OPT is a major advantage of studying in the United States. Exchange programs between institutional partners remain popular, and short-term programs for "free mover" students (those on short-term programs independent of their institution's exchange agreements) are gaining in popularity. When recruiting students in the region, institutions should include information about OPT, the J-1 internship program, and other short-term programs in addition to semester and yearlong opportunities.

Countries in the Spotlight

Belarus. Opportunities for engagement with Belarus are expected to increase as the political relationship with the United States continues to improve. The U.S. embassy is seeking to expand outreach and opportunities for exchange with Belarusians, and a U.S. ambassador may be appointed for the first time in nearly 15 years. The U.S. Consular section reopened non-immigrant visa adjudication services in Minsk in 2018, an important step in improving relations between the two countries. These positive steps will likely increase awareness of, and support for, study opportunities in the United States in the near future.

Thanks to a USA Study Abroad capacity-building grant in 2017, EducationUSA Belarus has hosted several workshops for Belarusian HEIs on establishing partnerships with U.S. institutions and developing the capacity to host American students on their campuses. While Belarus has institutional connections with neighboring countries, its political isolation over the past decade has left a void in connections with U.S. institutions. Now is the perfect time for U.S. institutions to take advantage of opportunities for academic exchange with Belarus, especially those that support the Ministry of Labour and Social Protection's priority fields—information technology, engineering, medical and social support services, psychology, and finance—and skilled labor in construction and agricultural sectors.

Belarus has one of the largest increases in student mobility rates to the United States. Compared to five years ago, 14.5 percent more Belarusians have studied in the United States. This reflects a 7.7 percent year-over-year increase between the 2018 and 2019. The country has traditionally been a graduate market, but in academic year (AY) 2018-2019, the number of undergraduate students in the United States exceeded the number of graduate students for the second year in a row. Overall, there is room for growth. The current number of Belarusians in the United States is 378, but UNESCO estimates that there are more than 22,000 academically mobile Belarusians, almost three-quarters of whom study in Russia and Poland. The United States currently ranks as the seventh most popular destination for Belarusian

students, behind countries such as the Czech Republic, Germany, and Italy.

Belarus recently changed its entry requirements for U.S. citizens and citizens of approximately 80 other countries, allowing them to visit Belarus without a visa for up to 30 days for business and tourism purposes. To take advantage of this visa-free travel, visitors must enter through the Minsk International Airport and cannot enter or exit the country through the Russian Federation. A visa is still required through other points of entry.

These visa changes have dramatically expanded opportunities for U.S. institutions to engage in Belarus, whether for student exchange or recruitment. Since these changes went into effect, EducationUSA Belarus has hosted two annual fairs for U.S. HEIs as part of the annual EducationUSA Eurasia Tour and plans to continue doing this in future years. As Belarus receives relatively few visits from U.S. HEIs, participating in EducationUSA events is an effective way to reach students and parents with a specific interest in the United States.

The EducationUSA team for Belarus, based in Vilnius, Lithuania, conducts extensive virtual outreach and programming for students in Belarus, including CCC and Opportunity Funds cohorts. The team develops Russian language content and can provide U.S. institutions guidance on marketing strategies that will resonate in Belarus and throughout the Russian-speaking community in the region.

Hungary. According to the 2019 *Open Doors* report, nearly 800 Hungarian students selected the United States as a study destination in AY 2018-2019, an 11 percent increase over the previous year and the largest increase in Central and Eastern Europe. Even with the decline in the Hungarian youth population over the past 10 years, student mobility from Hungary to the United States has steadily increased.

Hungary's gross domestic product (GDP) significantly exceeded the EU's average last year. Hungary is the seventh largest employer in the world in the nanotechnology and micro-nanotechnology sectors. The energy

Europe and Eurasia

sector and car industry remain prominent employers in the country. The booming Hungarian economy—along with the newly established hub centers for science, research, and innovation—will demand a workforce of next-generation scientists and professionals with international expertise. Significant EU and government funding has been allocated to establish and strengthen science parks and innovation centers throughout the country.

General socioeconomic indicators—such as the increase in the number of bilingual and international high schools in Hungary, higher English proficiency levels among Generation Z, strong family commitments to provide high-quality education for their children, and the UK’s withdrawal from the EU—will likely result in an ongoing interest in educational opportunities in the United States. Furthermore, a growing number of fields in Hungarian higher education, such as tourism and international business, require curricular practical training (CPT) that can be completed abroad and presents additional opportunities to increase the number of Hungarian students at foreign HEIs.

EducationUSA Hungary has a robust countrywide advising program, with one advising center located within the Hungarian Fulbright Commission in Budapest and four advising centers hosted at American Corners across the country. The centers maintain active outreach programs that reach about 8,000 students annually, and these numbers are growing, thanks to FLEX. In the coming years, FLEX alumni will begin

university-level studies and are likely to be interested in opportunities to study in the United States.

There is also a special focus given to LLM outreach across the country, since Fulbright has several agreements with U.S. universities for LLM prospective candidates. EducationUSA Hungary will continue hosting presentations on law studies in the United States in the coming year. Hungary also has an annual Counselor Training Academy that trains counselors and teachers in the capital to assist students with the U.S. admissions process.

Every January, EducationUSA Hungary joins EDUCATIO, the largest higher education fair in the country, hosting a booth in collaboration with the Fulbright Commission and American Councils. In 2020, Wright State University from Dayton, Ohio, was the first U.S. institution to join EducationUSA at this fair, and this collaboration yielded several dozen Hungarian applicants to Wright State. This three-day fair is an excellent way for U.S. HEIs to reach qualified applicants from Hungary.

Universities in Hungary have set ambitious campus internationalization goals, which have resulted in more degree programs being offered in English and a rapidly increasing number of foreign students at Hungarian HEIs. Since 2011, the number of U.S. students studying in Hungary has grown by 72 percent. Several Hungarian universities have interuniversity agreements, as well as joint degree programs with U.S. institutions.

The Ministry for Innovation and Technology has increased its contribution to support the Hungarian-American Fulbright Program, from USD\$150,000 in 2020 to USD\$600,000 by 2022, to match the U.S. contribution. This will enable more competitive grants and shorten the waiting list of applicants. The program continues to encourage applications in all fields and representing all geographic areas in both countries, with a special focus given to first-generation students and students from traditionally underrepresented groups. The Hungarian government’s increased investment will expand the number of grantees from about 40 to more than 60 by 2022.

Finally, Hungary’s government announced a new scholarship program that will support the participation of 90,000 Hungarian secondary school students in two-week language courses, mostly in English, in several EU countries and China. The government will provide around 180 million euros in funding. The start of the program has been postponed until 2021 due to the current situation.

Netherlands. With a population of just over 17 million, the Netherlands has the 17th largest economy in the world. The Dutch educational system offers a rigorous curriculum, with an increasing focus on programs in English and a strong international reputation. More than 85,000 international students currently study in the Netherlands, constituting 11.5 percent of the total student population. The Ministry of Education, Culture and Science strongly encourages Dutch students to study abroad, because foreign

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

Country	2014/15	2018/19	%Change
Albania	670	993	48.2%
Ukraine	1,551	1,953	25.9%
Italy	4,863	6,114	25.7%
Azerbaijan	408	489	19.9%
Netherlands	2,257	2,681	18.8%

48.2%

Albania 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



Iceland
College-Age
Population
25,008



Cyprus
College-Age
Population
59,603



Norway
College-Age
Population
346,425



Sweden
College-Age
Population
636,461



Greece
College-Age
Population
538,077

Source: UNESCO Institute of Statistics; Indicator: 2017 Population of the official age for tertiary education, both sexes

language and intercultural communication skills are becoming increasingly important in education and the labor market. As of 2020, nearly a quarter of the Dutch population has an immigrant background.

Therefore, the Dutch Ministry of Education, Culture and Science prioritizes English language and intercultural communication skills, and Dutch students have some of the highest levels of English proficiency in Europe, with an average TOEFL score of 100. More than 1,200 primary and secondary schools receive government funding to offer early foreign language education and bilingual (Dutch-English) programs. In higher education, English is increasingly the primary language of instruction.

Although Dutch universities offer affordable Bachelor's and Master's degrees, mobility rates to the United States are strong and stable. The United States and its educational system enjoy a positive reputation among Dutch students. Dutch media has traditionally covered the United States extensively, including news, popular culture, and TV shows. The United States is the third most popular destination for Dutch students, after Belgium and the UK.

Undergraduate students from the Netherlands are attracted to the liberal arts system and opportunities to play sports competitively in the United States. Many Dutch students compete at high levels and some of the most talented young athletes study at one of 29 specialized schools for athletes called the Topsport Talentscholen. Graduate students are also attracted to the quality of programs in the United States. There is also a significant market for non-degree, gap year, and exchange programs, and many Dutch HEIs are interested in developing partnerships with U.S. institutions.

Degree-seeking students can obtain low-interest government loans to study in the United States, but scholarship opportunities for undergraduate students are limited. For graduate study, Dutch students can apply for grants from several foundations, including Fulbright, KHMW-Eizenga (master of business administration [MBA] and economics), VSB-fonds, and Prins Bernhard Cultuurfonds.

EducationUSA in the Netherlands has two advisers housed in the Fulbright Commission in Amsterdam. The Fulbright Commission administers Fulbright programs and the Campus Scholarship Program, which assists undergraduate non-degree students in finding scholarships from U.S. universities. As Dutch students are independent and are increasingly researching opportunities online, EducationUSA advisers have redoubled their efforts to provide accurate online information in Dutch. Advisers also organize information sessions, webinars, and fairs, and actively involve alumni in outreach activities. In AY 2018-2019, a team of 20 EducationUSA student ambassadors visited nearly 40 events and reached approximately 5,000 students. Annual fairs include an undergraduate college fair, the LLM tour, an MBA fair, and the BuitenlandBeurs fair.

Serbia. Serbian student mobility to the United States has remained steady at around 1,000 students for nearly a decade. With the largest college-age population among the former Yugoslav republics, Serbia also boasts the highest number of students choosing to study in the United States. Serbian students take full advantage of the diversity offered by U.S. higher education, as demonstrated by their presence in 49 of the 50 states, as well as in the District of Columbia.

Foreign direct investments in Serbia are on the rise, and an international education provides an edge in career prospects. Families are aware of this, and that awareness accounts for their steady investment and interest in U.S. higher education. At the same time, companies from abroad investing in Serbia constantly

Regional Student Totals Top Five Countries of Origin

Country	2018/19	% Change
United Kingdom	11,146	-2.7%
Turkey	10,159	-3.4%
Germany	9,191	-8.5%
France	8,716	-1%
Spain	7,262	-3%

Europe and Eurasia

cite the well-educated and well-trained workforce as a major attraction.

For example, the U.S. company NCR has provided a high-profile investment of approximately USD\$90 million to build a 30,000 square meter state-of-the-art technology campus in Belgrade. Although Serbian development remains regionally uneven, with the greatest areas of economic development in the Belgrade and Novi Sad regions, there have been significant investments outside of these regions as well.

Serbian is the primary language of instruction in the Serbian secondary education system. However, some schools offer instruction in minority languages, such as Hungarian and Albanian. In fact, the influence of Serbia's diverse population and student academic choices is reflected in student mobility data. Austria remains the top international study destination for students in Serbia, while Hungary remains in second place, followed by Bosnia and Herzegovina, North Macedonia, and the United States. Of the study abroad destinations for Serbians, the United States is the only country in the top 10 with English as its primary language of instruction. However, the increasing number of English language degree programs in Europe is starting to put pressure on the U.S. market. It is important that U.S. institutions are aware of this trend and step up recruiting efforts to maintain their favorable reputation and position.

Public schooling at the secondary level in Serbia is undergoing some positive changes. Until recently, only private schools in Serbia provided International Baccalaureate (IB) programs, A and AS levels programs, and the University of Nebraska High School program, but this is changing now as public schools expand their program offerings. For example, the Serbian government recently piloted its first IB program in Novi Sad and is set to expand this program to other public schools. Currently, the program is offered at no cost to students.

Although Serbian students have heavy course loads, they still put a relatively large emphasis on athletics. Many students are interested in athletic

scholarships (e.g., basketball, volleyball, tennis, and rowing) to help cover the cost of study in the United States.

Recently, Serbian universities have expressed increased interest in cooperating with U.S. universities, particularly in the STEM fields. Part of this interest is likely due to an increasing number of young faculty being educated in the United States and returning to teach in Serbia. This interest is still in the formative stage, but the lines of communication are definitely starting to open on the Serbian side.

Starting in the summer of 2020, EducationUSA Serbia will offer an intensive online advising course for prospective undergraduate students. Supported by the U.S. embassy in Belgrade and the U.S. Department of State, the course will run in 12-week cycles and be offered three times annually.

EducationUSA Serbia holds two large annual events: the EducationUSA College Day, where prospective students and their families learn from the firsthand experiences of U.S. alumni, and the EducationUSA Southeastern Europe Tour, where prospective students and their families meet with U.S. college and university admissions officers.

Sweden. Sweden has a strong history of inbound and outbound student mobility, with approximately 3,500 Swedish students studying in the United States annually. About 17 percent of Swedish students who study abroad choose the United States, making it and the UK among the most popular study destinations. There has been a decline in “free mover” students, following a trend in Sweden in which fewer undergraduate students are studying abroad. At the same time, there has been an increase in Swedish students participating in exchanges, non-degree and short-term programs, graduate studies, and OPT programs abroad generally and to the United States in particular.

Swedish students finish high school at 19 years old, and many choose to take at least one gap year before starting their undergraduate studies. Therefore, short-term study opportunities, gap year programs, and studies at a U.S. community college are of particular

interest to them. Popular fields for undergraduate study in the U.S. are the humanities, the arts, the social sciences, and STEM subjects. For graduate study, LLM, Master of International Affairs, MBA, and STEM programs are the most popular.

Swedish students attending accredited institutions abroad can apply for government-funded loans and small grants from the Swedish Board of Student Finance (CSN), which can cover part of the cost of four-year undergraduate programs in the United States. In general, Swedish HEIs are interested in establishing more partnerships with U.S. institutions to create further mobility opportunities for students, faculty, and staff. The Commercial Service section of the U.S. Embassy in Sweden works actively to help establish these partnerships.

EducationUSA has two centers in Sweden. The Stockholm center, hosted by the Fulbright Commission, provides advising services and participates in study and college fairs at local high schools and external venues. EducationUSA Malmö, located in Malmö Borgarskola, houses a one-of-a-kind IB student group. This group is active in a range of activities, including outreach events, college fairs, and social media campaigns on Facebook, Instagram, and Snapchat.

What to Expect in the Next Three to Five Years

Perceptions of the United States continue to be shaped by domestic and world events, and some students and families from the region still question how welcome international students are, despite the considerable efforts of U.S. HEIs and the U.S. government to encourage student mobility. As significant events, such as Brexit; the emerging Erasmus program budget; and other global pressures mount, uncertainty will impact student mobility numbers and patterns across the globe.

Over the past year, European secondary and postsecondary educational systems have continued to internationalize while placing a greater emphasis on study abroad experiences. These efforts include mandatory study abroad requirements and bilingual education systems in countries such as Spain. To support this internationalization, new scholarship

and partnership programs are expected. Changes are also expected in government higher education financial aid programs to make that support more portable.

Conversely, some changes to educational systems may dissuade students from studying abroad. The Finnish system is implementing new incentives for its students to graduate faster, for example, which would leave little time for study abroad experiences or require those experiences to be shorter.

Institutions from across the region are more visible at international education conferences and have extensive partnerships with institutions in Asia and the Western Hemisphere. These institutions are also increasing their marketing efforts to reach more American students, touting their lower costs and safe environments. As a result, institutions in Europe and Eurasia will become serious competitors to U.S. institutions, for students not only from the region, but from across the globe.

Demographics will continue to play a big role in student mobility from the region. After years of region-wide decline in the college-age population, youth numbers are expected to increase in the coming years in some countries. For example, after years of a birth rate dip in the UK, there was a recent population explosion. Consequently, the current population of 10-year-olds is testing the limits of the school system. When these students are ready to attend university, capacity at UK universities will be limited. The youth population also continues to rebound in Azerbaijan, Russia, and Ukraine, and mobility for undergraduate students is expected to continue to increase over the next three to five years. For example, the number of high school graduates in 2021 in Russia is expected to be 700,000, which is nearly a 10 percent increase from 2019. While this is significant, European countries tend to have more stable demographics and smaller under-25 proportions of their populations than does Russia.

Turkey continues to have the largest youth population in Europe and Eurasia: 16 percent of the entire population is between the ages of 15 and 24, and this number is expected to grow in the next 10 years. The economy is slowly rebounding

as well. The U.S. dollar gained 42 percent against the Turkish lira in 2018 and another 12 percent in 2019. Even though the Turkish economy still shows high levels of uncertainty, rising inflation, and unemployment, sending their children to study in the United States remains a viable option for affluent families.

Virtual Engagement and Social Media Usage

Virtual programming and social media outreach are large components of advising activities for Europe and Eurasia. Internet connections and mobile data networks are widely available and generally very low in cost compared to similar services in the United States. Iceland, for example, is one of the most connected countries in the world, with 91 percent of its population using social media and 94 percent of 16- to 24-year-old students on these platforms.

All of the top social media platforms are used throughout the region, though

preferences vary among different age groups. In Slovenia, for example, Generation X mainly uses LinkedIn and Viber. Generation Y has started using Telegram more, and Generation Z can be found on Tumblr and Snapchat. Younger audiences are more drawn to Instagram and Snapchat, but Facebook is still the most commonly used platform. Twitter is less popular overall. For Russian-speaking audiences, Vkontakte is a valuable tool. Some advisers report that TikTok is also growing in popularity. WhatsApp is widely used across the region; can be employed as a form of virtual outreach; and, in some countries in Western Europe, is perhaps the most effective and utilized platform. HEIs are encouraged to learn about best practices for student engagement on social media while remaining in compliance with the General Data Protection Regulation (GDPR). For additional information, visit https://ec.europa.eu/info/law/law-topic/data-protection_en.

U.S. Study Abroad

Top Five Receiving Countries in the Region

Destination	2017/18	% Change
United Kingdom	39,403	-1.1%
Italy	36,945	4.5%
Spain	32,411	3.8%
France	17,185	4.4%
Germany	12,250	-2.7%

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
Portugal	319	857	168.7%
Iceland	485	1,129	132.8%
Croatia	330	733	122.1%
Finland	263	509	93.5%
Greece	3,066	5,223	70.4%

Europe and Eurasia



Students want to engage with their peers, and this could happen in live chat sessions or through social media takeovers. They want to hear student (and alumni) success stories, gain insights into life on campus and in the community, and acquire inside information about studying in the United States. Using the local language is especially effective in countries such as Turkey. The advisers in Belarus, the Czech Republic, Poland, Russia, and Ukraine are especially skilled with social media engagement and can provide guidance to U.S. HEIs on the best ways to promote their institutions to local audiences. Since students want firsthand testimonials rather than polished marketing campaigns, U.S. institutions should seek to develop their own influencers among the international student body. These could include students from the region or from specific countries that U.S. universities seek to target for future

enrollment. This approach is especially valuable in reaching audiences in Belarus, Russia, and Turkey.

As a general rule, the popularity of webinars has decreased while shorter Facebook Live or Instagram Stories have grown in popularity. The best way to engage using virtual outreach is to work with EducationUSA advisers in cohort advising programs and provide content based on their programming needs. Even in countries without cohort advising programs, EducationUSA advisers can guide universities on which topics would be most beneficial for local audiences.

Advisers from across the region often organize webinars and conduct a call for presenters from U.S. institutions. HEIs are encouraged to participate in these events to share their expertise and promote their respective institutions. Unless an HEI

presenter wants to target a more specific audience, EducationUSA advisers in Europe and Eurasia will share the webinar information and connection details with students throughout the region, so it is not necessary to set up individual, country-specific webinars.

Many centers have their own YouTube channels, such as those in Belgium and Belarus, which feature instructional videos as well as interviews with students. Video content, especially shorter clips, is particularly popular with prospective students. Country-specific video content can be sent to the advisers for posting on their channels, though subtitles are required for the materials to be posted to EducationUSA channels.

Successful Recruiting Strategies

With virtual connections and social media being stressed as low cost and effective means for outreach, especially with limited travel budgets, the importance of in-person engagement is often neglected, especially in Europe and Eurasia. Institutions that rely only on virtual engagement will not get the same response as those that have a sustained outreach commitment that includes virtual and in-person connections.

U.S. HEIs are encouraged to take an institution-wide approach to recruiting international students. Using alumni and study abroad students to promote U.S. institutions and programs is often more powerful than having representatives deliver the same message. Visiting faculty members can give mock lectures to promote their institutions and the U.S. classroom experience. EducationUSA advisers in the region welcome faculty-led groups to visit their centers, and they can set up meetings for U.S. students to connect with local students. This approach has been especially valuable in Russia and Belarus but can be replicated with other countries in the region. U.S. HEIs can sign up for the Europe and Eurasia newsletter to learn more about upcoming in-person engagement opportunities (<http://eepurl.com/dEQdhf>).

The content of the marketing message should also stress return on investment, which can include job and internship opportunities (CPT, OPT, resident assistant, teaching assistant). The ability to collaborate on faculty research projects

and publish scholarly articles while still at the undergraduate level is a feature of studying in the United States that is likely to be of great interest to prospective students. U.S. institutions should highlight alumni employment outcomes, especially if there are stories of alumni securing employment at prominent companies and organizations. OPT continues to be a major draw for students to study in the United States, so recruiting materials should address ways that HEIs support students in securing post-graduation opportunities.

Students in the region can be brand or location conscious, but they are open to the diverse options in the United States when they learn more about the opportunities available on campuses about which they might not have been aware. U.S. institutions in less traditional destinations for international students should focus on the benefits of studying in diverse settings and locations in the United States, such as affordability, safety, and community.

Intensive English language programs are not of particular interest to students in Western and Northern Europe because of their high levels of proficiency. Other types of short-term programs are of enormous interest, especially those that happen from the last week of July to August. The areas of thematic interest (e.g., STEM or entrepreneurship) vary from country to country, but programs that offer academic credit are the most popular. U.S. institutions need to compile information about all of the short-term programs and non-degree options offered for international students, place them in one location, and standardize the application process for those programs as much as possible.

Students in Europe and Eurasia are accustomed to simple application procedures for higher education in the region, so U.S. institutions are encouraged to make their applications as flexible and simple as possible. HEIs should accept a variety of English proficiency exams and promote any test optional or flexible policies. For students from the region, the main barrier to studying in the United States is cost, and this includes the expenses associated with the application process.

U.S. institutions need to work with their American and international alumni to represent the institution in Europe and Eurasia. EducationUSA offers dedicated alumni fairs and events throughout the year. U.S. institutions should consider training alumni, and even study abroad students, to represent the institution in a meaningful way. EducationUSA and American Spaces can engage alumni and study abroad students at student fairs, high school visits, and other outreach events.

Institutional Partnerships

Institutional partnerships with HEIs continue to be an important, yet underutilized way to increase student mobility with Europe and Eurasia. Local HEIs face the same challenges as those in the United States: declining youth populations, shrinking budgets, and increased competition for students. They are looking for connections beyond the region. The partnership needs of European colleges and universities will vary by institution and department, as is the case with U.S. institutions.

Even though most European HEIs already have institutional partnerships with U.S. institutions, this does not mean that they are not seeking new ones or do not want ideas to innovate their existing partnerships. European HEIs frequently comment on how study abroad agreements with their U.S. counterparts are oversubscribed to on their side, with more European students wanting to go to the United States than vice versa, so U.S. institutions should explore options that increase mobility beyond those one-to-one agreements. EducationUSA advisers themselves can play a convening role to facilitate engagement between prospective partners, so U.S. institutions should provide this information when reaching out.

Credit transfer and program costs are major concerns for local institutions, and they often are looking for dual-degree programs, short-term exchanges for students and faculty, and research collaboration. All institutions are eager to increase the number of U.S. students on their campuses. With funds from the USA Study Abroad Branch, Fulbright Commissions and U.S. embassies in the region have provided workshops for their local HEIs on how to develop partnerships and increase their capacity to host U.S. students in the region. To date,

EducationUSA advisers in 18 countries have hosted or participated in these workshops and can provide details about partnership needs and opportunities in their countries.

There are many public and private organizations that offer programs to facilitate institutional partnership development. EducationUSA advisers have the most up-to-date and comprehensive information about those programs in their respective countries. Some examples of partnership development resources include those provided through BUTEX in the UK, Fulbright Commissions across the region, the German Academic Exchange Service (DAAD), International Student Exchange Programs, Mission Interuniversitaire de Coordination des Echanges Franco-Américains, and other organizations. U.S. HEIs should also consider the International Academic Partnership Program in Greece, administered by the Institute of International Education (IIE), which is open to all accredited U.S. HEIs interested in developing new partnerships in Greece. This program is designed to support strategic dialogue among IIE, partners in the host country, and the U.S. higher education community.

Opportunities are also available through the U.S. Department of State's USA Study Abroad Branch. Visit the website for information on the next round of the IDEAS (Increase and Diversify Education Abroad for U.S. Students) program grants (<https://studyabroad.state.gov/>). While this program is not limited to Europe, it can provide support to U.S. HEIs in developing new partnerships and enhance existing partnerships that bolster study abroad opportunities. The Foreign Commercial Service (FCS) division is very active in Europe, including in the educational arena, and there are FCS representatives across the region who run programs exclusively for HEIs.

International education conferences (such as those hosted by NAFSA and EAIE) provide networking opportunities with institutions from Europe and Eurasia. EAIE is especially valuable for making connections in the region. EducationUSA hosts a U.S. Pavilion each year for accredited U.S. HEIs. The conference happens every September (in 2020 it was postponed until October), and it is an excellent venue to establish new and nurture existing partnerships.

Europe and Eurasia

Many countries in the region have well-established vocational training programs that may include apprenticeships. Institutions that administer those types of programs are particularly interested in establishing partnerships with community colleges and/or U.S. institutions that can help to facilitate internships even for short durations. They also welcome U.S. professors as guest instructors on their campuses.

Foreign Government and Private Funding

EducationUSA advisers stay abreast of new and evolving scholarship programs in their countries. Visit the educationusa.state.gov "Find an 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-European 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 to have 4 million participants studying 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. 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. The next funding and programmatic cycle for Erasmus+ will begin in 2021.

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 their

Times Higher Education ranking. Students qualify if they receive 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 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 EducationUSA Yerevan center page: <https://educationusa.state.gov/centers/yerevan-american-councils>

Austria. The Marietta Blau Grant for Ph.D. students awards 1,500 euros per month for six to 12 months. The Austrian Agency for International Cooperation in Education, Science and Research offers additional support.

Baltic-American Freedom Foundation. The Baltic-American Freedom Foundation provides funds for 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 Education 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 other 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.

Croatia. U.S. Mobility Micro-Grants cover up to USD\$500 for application costs to U.S. universities (for Bachelor's and Master's programs). Other scholarships include the Vera Scholarship for undergraduates, the Bepina Sabalic Kunin Endowed Scholarship Fund at Georgetown University for graduates and professionals, and the Zlatko and Joyce Baloković Scholarship Fund.

Czech Republic. Several private foundations offer scholarships for study abroad: the Bakala Foundation, the Kellner Family Foundation, the Scholar Foundation, and the Krsek Foundation. Amounts vary, but all programs provide support of as much as USD\$30,000.

Denmark. The State Educational Grant provides generous support for 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.

Finland. The League of Finnish American Societies provides funding for doctoral students. There is also student aid from the Finnish government for study abroad, including in the United States, for as much as US\$490 per month for a living allowance and USD\$860 per month for academic expenses.

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 USD\$50,000 for study in Master's or Ph.D. programs in STEM fields.

Georgia. The Georgian government's scholarship provides, on average, USD\$20,000 and is available for all fields of study, though the number of scholarships for MBA and LLM programs is limited. Students who receive this funding are expected to return to Georgia and work in the public sector for at least three years. The application cycle occurs in the spring each year.

Germany. The German Academic Exchange Service (DAAD) provides semester- or yearlong scholarships for study in non-degree programs at the undergraduate and graduate levels. Arnold Heidsieck Scholarships are available from the ZEIT-Stiftung foundation and can cover one year of undergraduate studies in the humanities. The Association of German-American Societies provides funds that cover most programs, except medicine and law. Baden-Württemberg scholarships support exchange between students at universities in German states and their partner institutions.

Greece. Current support from Greece for U.S. studies is available only for graduate studies. More details on the foundations that provide this support can be found on the EducationUSA Greece center page: <https://educationusa.state.gov/centers/fulbright-athens>

Hungary. The Hungarian government offers the Stipendium Peregrinum for students ages 17 to 23 to pursue undergraduate or graduate studies abroad. In the U.S., 22 HEIs are prioritized for this funding, which covers application fees and full financial aid. The Magyar Állami Eötvös Ösztöndíj is a three- to eight-month scholarship supporting doctoral studies and research in any field. 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.

Iceland. Fara Bara is a website that posts general information about study abroad opportunities for Icelandic students, as well as Icelandic and foreign scholarships. The Thor program awards scholarships ranging from USD\$2,000 to USD\$5,000 for graduate studies. The Leifur Eiriksson Foundation awards USD\$25,000 for graduate studies.

Ireland. The Irish Research Council provides support to researchers across all disciplines. The George Moore Scholarship

(new in 2020) provides support to students applying to Master's programs and includes tuition fees, research travel, visa, health insurance, and other living costs.

Italy. The Fulbright Commission and the Zegna Foundation provide full scholarships to economically disadvantaged graduate students.

Kosovo. The Kosovo American Education Fund (KAEF) is an education fund administered by American Councils and dedicated to the long-term economic development of Kosovo through the education of its people. KAEF provides up to eight graduate fellowships per year to promising Kosovars for top-level training at select U.S. universities.

Lithuania. Through the Next 100 program (Kitas 100), the Lithuanian government offers funding for students applying to, or already studying at, universities and colleges that are listed among the top 50 institutions in world-ranking systems. The scholarships are available for the full period of study (from one to four years), and the maximum award amount is around USD\$22,500 per year. Funding is available in all academic fields and levels. Awards are administered by the State Studies Foundation, and the deadline is in early July each year.

Luxembourg. Every student in 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 loans with generous repayment provisions. Students can use this financial support for a study abroad experience. The Centre de Documentation et d'Information sur l'Enseignement Supérieur (CEDIES) oversees this program.

Netherlands. The Dutch government offers low-interest loans through the DUO program. This is the only source of funding for Dutch students who intend to complete a degree in the United States at the undergraduate level. KHMW-Eizenga scholarships provide up to USD\$50,000 to Dutch nationals interested in pursuing a degree in economics or an MBA. Several foundations offer funding for prospective graduate students to the United States, including Prins Bernhard Cultuurfonds, VSBfonds, and Vrijvrouwe van Renswoude.

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 University Rankings). The scholarships are restricted to several fields, and the maximum award is USD\$40,000 per year for tuition, airfare, and a monthly stipend.



Europe and Eurasia

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 and grant package. The funding is for students in full-time academic programs at both the undergraduate and graduate levels, and the loan and grant package depends on a variety of factors and criteria.

Serbia. The Ministry of Youth and Sports awards graduate scholarships for overseas study based on enrollment at institutions that are ranked by the Shanghai Ranking as a top 500 institution. The ministry also awards scholarships for study at designated performing arts schools around the world. The funding is as much as US\$11,000 per year.

Slovak Republic. The Tatra Banka Foundation offers grants for all academic levels. The maximum amount is 5,000 euros per student to support IT projects. Students can apply for grants from the ESET Foundation.

Slovenia. The Ad Futura scholarship offers students as much as USD\$33,000 annually for the duration of their academic program. Many students combine this scholarship with other financial aid from U.S. HEIs. This scholarship program funds undergraduate studies in STEM fields or graduate studies in all fields except the fine and performing arts. The Ministry of Culture awards other generous scholarships to undergraduate and graduate students in the fine and performing arts, cultural management, and other fields.

Spain. La Caixa, Rafael del Pino, and the Fundacion Ramon Areces all provide support for graduate studies.

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.

Switzerland. The Swiss Benevolent Society of New York offers scholarships, including the Medicus Student Exchange Scholarship, the Sonja Streuli Maguire Outstanding Scholastic Achievement Award, and the Swiss Benevolent Pellegrini Scholarship. Students can apply for study

stipends and loans from their cantonal government for a semester- or year-long study abroad or exchange program.

Turkey. The Turkish Ministry of National Education provides scholarships for graduate study at top-ranked 500 universities in world rankings. Support for language training is also provided, if needed. Grantees are expected to return home and serve at public universities or institutions. The Scientific and Technological Research Council of Turkey (TUBITAK) provides funding for doctoral studies. The Turkish Educational Foundation provides scholarships in selected fields for Master's level study. All three sources provide funds for transportation, health insurance, school fees, and living expenses.

United Kingdom. The Sutton Trust U.S. Programme welcomed its eighth cohort of students in April 2019. It provides generous support to economically disadvantaged students who have outstanding academic qualifications and want to apply to U.S. colleges and universities. BUNAC (British Universities North America Club) also provides support, offering partial scholarships for British students applying to graduate school in the United States.

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 Economics and Market Demand Participation in OPT as a category increased overall by 4.8 percent for the region, and this rise is a testament to the continued interest in hands-on learning.

The IT sector is the most in-demand industry for many countries in Europe and Eurasia. Belarus, North Macedonia, Serbia, and Ukraine have become popular destinations for outsourcing jobs from Western Europe and the United States. Jobs in this field come with a comparatively high salary, and many governments in the region have made IT a priority for development in both the economy and education sectors. In 2019, the Latvian government allocated almost

700,000 euros to send 14 IT specialists from Latvian universities to the United States to further develop their skills and to share this knowledge with students and colleagues upon return. U.S. HEIs with strong computer science and artificial intelligence programs are well-positioned to attract Czech students who have an interest in learning from U.S. research and employing that knowledge in the Czech Republic. The number of tech companies is growing in Albania and Turkey, resulting in a high demand for graphic designers, software engineers, and software developers.

Across Western and Northern Europe, the need for data analytics and management in the transport and logistics sectors is on the rise, and the financial technology sector (sometimes shortened to "fintech") in the UK is expected to grow by 88 percent between 2018 and 2021. Construction, digital marketing, and advertising have had strong growth for the past decade, and energy expertise, especially in renewable energy, is needed to meet government targets. According to Statbel, the Belgian statistical office, almost 80 percent of job vacancies in Belgium can be found in nonprofits, scientific and administrative activities, wholesale and retail trade, industry, and construction.

Southern and Eastern Europe face daily immigration challenges, aging populations, shrinking youth populations, and a growing demand for service industries and jobs to address a host of infrastructure issues. This trend is especially pronounced in Montenegro, where local governments have focused their development efforts on these issues. The medical and social services sectors are among the fields in need of development. Skilled labor is also in high demand, especially in the manufacturing and construction fields, and attracting youth to vocational education is a priority for countries in Southern and Eastern Europe. The agricultural sector, especially in Bulgaria, Moldova, and Ukraine, needs the most development and is expected to be the fastest growing, because agricultural exports are some of the main contributors to their GDPs.

Regional EducationUSA Events

EducationUSA in Europe and Eurasia provides a wide variety of opportunities for HEI engagement in the region, and advisers plan events throughout the

year. Visit the EducationUSA website to find information about upcoming fairs, webinars, conferences, and other upcoming events and activities. The events listed below are hosted by EducationUSA or are EducationUSA-organized pavilions at national fairs. EducationUSA advisers can share a full list of commercial fair offerings where U.S. institutions can reach their target audiences in their respective countries.

Fairs and Conferences

The European Association for International Education (EAIE) holds the largest annual higher education conference in Europe, attracting thousands of participants from more than 95 countries. U.S. HEIs that exhibit at a booth have reported that the EducationUSA Pavilion led to an increase in their institution's visibility, more students from Europe on their campuses, and an increase in exchange-related income for their institutions. Learn more about the 2021 EAIE conference at <https://www.eaie.org/gothenburg.html>.

The **EducationUSA Europe and Eurasia Regional Forum** is scheduled to take place in the fall of 2021. More than 90 EducationUSA advisers from 46 countries are expected to attend. This is an excellent opportunity to get in-depth information about trends in the region and network with colleagues from U.S. embassies and local higher education counterparts. In addition to the chance to attend a workshop, U.S. HEIs have the opportunity to represent their institutions to local audiences as part of the higher education fair.

The **Annual Eurasia and Central Asia Tour** scheduled for October 2020 will

not take place as planned. For updates, visit the "Find an Event" page at <https://educationusa.state.gov>.

The **6th Annual European LLM Tour** is scheduled for November 2020. Contact REACs Peter Baker (pbaker@educationusa.org) and Gordana Mirchikj (gmirchikj@educationusa.org) for more details.

The **8th Annual Russia Winter Tour** is scheduled for February 2021 and will include stops in Moscow, Novosibirsk, St. Petersburg, Vladivostok, and Yekaterinburg. This is a smaller tour with five to 10 institutions on average participating in the full tour, and it is scheduled so that those who want to attend the EducationUSA Pavilion in Vilnius may do so. The registration deadline is generally in December each year, and tour information will be available at winter.educationusarussia.org.

The **8th Annual EducationUSA Southeastern Europe Tour** in spring 2021 is scheduled to include fairs in Albania, Bosnia and Herzegovina, Croatia, Cyprus, Kosovo, Montenegro, North Macedonia, Serbia, and Slovenia. Sign up at eepurl.com/bUIBOT to receive the EducationUSA monthly newsletter on Europe and Eurasia to keep abreast of recruiting events planned in the region, as well as information about emerging trends.

U.S. Study Abroad in the Region

For the past 10 years, more than half of the U.S. students who studied abroad studied in Europe and Eurasia. According to the 2019 *Open Doors* report, the overall number increased by 3.5 percent from the previous year. 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, the Czech Republic, Greece, Denmark, Austria, and the Netherlands. Other countries in the region have seen significant increases in inbound student mobility from the United States. The following countries had the largest percentage increases: Ukraine, Bosnia and Herzegovina, Bulgaria, Lithuania, Turkey, Montenegro, Georgia, Kosovo, and Cyprus.

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 institutions, joined conversation groups, assisted with mock admissions interviews, participated in alumni fairs, and participated in other events that allowed them to engage with local high school and university students.

In 2019, U.S. embassies and/or Fulbright Commissions in Armenia, Azerbaijan, Belgium, Cyprus, Czech Republic, Finland, Georgia, Greece, Italy, Luxembourg, Poland, Portugal, Slovenia, Spain, Turkey, the UK, and Ukraine received Study Abroad Engagement Grants from the USA Study Abroad Branch at the Bureau of Educational and Cultural Affairs to carry out capacity-building projects to promote American 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)

In general, the best times to interact with students are from 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 the Roman and Eastern 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

16 Comprehensive
10 Standard
1 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; American Centers; and a new World Learning center in Algeria. EducationUSA advising activities for Iran, Libya, and Syria are conducted virtually. The region has 27 centers (16 comprehensive, 10 standard, and one reference) in 19 countries and territories and 30 advisers who provide up-to-date services and programming.

The advisers within the EducationUSA network are an invaluable resource, providing expertise, support, and information about their local context. In addition to advising students and counselors, the centers offer U.S. higher education institutions (HEIs) and governmental partners the opportunity to engage in tailored programs and activities to increase student mobility. Gulf countries such as Bahrain, Iraq, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates (UAE) offer government scholarship programs to their citizens. EducationUSA advisers maintain contact with these scholarship offices to connect them with potential HEI partners and to guide students looking for study opportunities in the United States.

The MENA region is a dynamic and complex area that can be generally divided into three sub-regions: North Africa, the Levant, and the Gulf. While

these sub-regions share a lot in common, each also possesses distinct features. For example, many countries in the Gulf region offer students government scholarship programs, and across North Africa, there is broad student interest in studying in Europe.

EducationUSA advisers in the MENA region work in an environment of frequent change and opportunity. Despite overall growth in population over the past decade, the 2019 *Open Doors* report indicates an 11.2 percent decrease in students coming from the region during academic year (AY) 2018-2019, compared to AY 2017-2018. This decline from the MENA region represents a decrease for the third consecutive year, with Libya (-16.9 percent), Qatar (-26 percent), Saudi Arabia (-16.5 percent), and the UAE (-5 percent) decreasing as a result of scaled-back government scholarship programs, recent changes in mandatory military service requirements, growing higher education options in the region, and increased competition from other countries. After 10 years of consistent growth, student numbers from Kuwait also dropped 9.8 percent. However, numbers from select countries grew, including Algeria (+12.3 percent), Israel (+2.8 percent), Jordan (+0.6 percent), and Lebanon (+2.4 percent).

The region boasts many Competitive College Clubs (CCCs) through which advisers meet regularly with highly motivated and 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, spelling bees, guest speakers, test preparation, and information sessions on the application process. All CCCs foster student leadership skills. Currently, there are CCCs in Algeria, Egypt, Israel, Lebanon, Morocco, Tunisia and the West Bank. EducationUSA Egypt and EducationUSA Lebanon also 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 are located within Public Affairs sections. Regional Educational Advising Coordinators (REACs) and EducationUSA advisers hold regular education briefings 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 11.2 percent decrease in MENA students enrolled at U.S. colleges and universities in 2018-2019. The decline in new enrollments is primarily the result of scaled-back government scholarship programs in Iraq, Libya, Qatar, Saudi Arabia, and the UAE. Scholarship programs across the region are being revised and restructured, often as a result of lower oil prices. Changes in the lists of approved institutions for Gulf government scholarship programs have also disrupted the pipeline for students coming to the United States. Local and regional institutions are becoming attractive destinations because of their costs, locations, and partnerships with local institutions. However, there are still significant opportunities for growth in student numbers from the region.

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 mathematics (STEM) fields are in high demand, and there is a growing interest in health fields. Students in countries such as 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 U.S.-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 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 plans. Some choose Canada because of the perception that the country offers lower tuition rates and an easier student visa process. The United Kingdom is attractive because of geographic proximity and strong ties to Gulf countries such as Bahrain, Qatar, and the UAE. For students from North Africa, France remains a viable alternative because of geographic proximity and linguistic affinity.

Increasing numbers of MENA students are opting to study closer to home, choosing institutions in Oman, Turkey, and the UAE. Competition for international students in the Gulf is growing as Qatar and the UAE both strive to be an education hub. Many Gulf countries make it easier for foreign nationals to remain in their countries to finish their higher education by easing visa restrictions and allowing students to work. There are also growing numbers of U.S. branch campuses in the region—including six in Qatar and three in the UAE—that are growing in popularity. For example, UAE student enrollment at U.S. university branch campuses has increased 43 percent, from 8,317 in AY 2008-2009 to 14,549 in AY 2018-2019. Additionally, numerous American-style HEIs in the region have attained accreditation from one or more U.S. accrediting organizations. Currently, such HEIs include one in Egypt, two in Lebanon, one in Morocco, one in Qatar, one in Saudi Arabia, and six in the UAE.

Recruiters are often asked to seek local government permission before entering

Middle East and North Africa

secondary schools. The security process required to gain access takes time, especially in STEM-focused and other government 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, Kuwait, and the UAE, introduced mandates requiring public fair organizers to collaborate with a local agency.

Some MENA students remain concerned about their reception and treatment in the United States. The #YouAreWelcomeHere campaign is one way that U.S. institutions can share messages and videos with the global student community about their commitment to a diverse student population on campus and a welcoming environment for international students. Visiting the region and holding recruitment events in person are also positive ways to show that the United States welcomes students from MENA.

Countries in the Spotlight

Lebanon. With recent popular demonstrations in Beirut and the current political climate in Lebanon, many parents are interested in their children studying abroad. Traditionally, Lebanese students have been mostly interested in STEM fields or business programs; however, there has been an increased interest in the liberal arts and sciences over the last year. High-quality English programs are offered in Lebanon, so students tend to develop the needed language skills in-country. Most schools in Lebanon are trilingual and use Arabic with English and/or French as the medium of instruction for mathematics and

science. English or French is taught along with Arabic beginning in primary school. Lebanon does not offer government scholarship programs, so students are either self-funded or seek institutional financial support from U.S. HEIs. EducationUSA Lebanon advisers serve a diverse student population, including Lebanese nationals and refugees from the West Bank and Syria. The advisers manage a robust CCC and Opportunity Funds program. The CCC attracts students who are some of the best from the region and who have outstanding academic and extracurricular profiles. In fall 2019, 12 CCC students began their studies in the United States, receiving USD\$2.9 million in scholarships over a four-year period.

Morocco. According to the latest *Open Doors* figures, Morocco experienced a decline in student numbers for the second consecutive year, after a steady increase from 2013 to 2017. Despite this drop, there are a variety of upcoming changes to the educational system in Morocco that should lead to a positive shift in numbers of Moroccan students studying in the United States. In January 2020, the Minister of National Education, Vocational Training, Higher Education, and Scientific Research announced that as of September of the same year, Morocco will adopt the Bachelor system to replace the Licence, Master, Doctorat (LMD) system. With this new alignment with the U.S. undergraduate model, more students will be able to easily transfer to graduate programs in the United States. Additional higher education reforms are underway in Morocco that will better prepare students for U.S. programs, including a greater focus on English

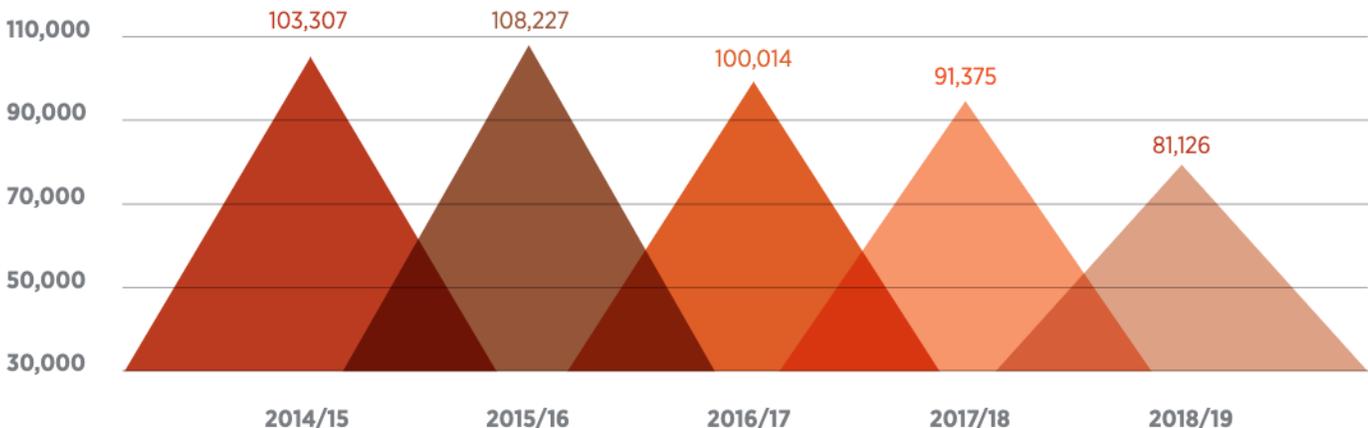
language skills. There is also an anticipated need for U.S. HEIs to provide English training for teachers of mathematics and science, especially teachers of physics and chemistry.

United Arab Emirates. The number of Emiratis studying in the United States has more than doubled since AY 2008-2009. The UAE National Higher Education Strategy outlines the country's goal to become an international education destination. It aims to raise the global rankings of local universities to build a globally competitive generation equipped to contribute to the country's knowledge-based economy. The landscape brings opportunities both at home and abroad. Four major American universities—American University, City University College in Ajman, New York University, and the Rochester Institute of Technology (RIT)—operate across seven UAE campuses. This summer, RIT Dubai will open a new campus that will be able to accommodate 4,000 students. The UAE has 99 International Baccalaureate schools, and many Emirati students are well prepared to study at selective U.S. institutions. In 2018, the UAE Armed Forces extended its national service term from 12 to 16 months. As a result, many Emirati high school graduates have to defer their enrollment in higher education by one academic year. This will affect fall intake for higher education institutes in the UAE and abroad.

What to Expect in the Next Three to Five Years

- As English instruction is introduced to more schools in North Africa, the

Student Mobility in the Region (Five-Year Trend)



interest in Intensive English language Programs (IEPs) will likely see a continued decline. There has already been a decline in the broader Middle East region as government scholarship programs limit English language study abroad and as more affordable local and regional opportunities have become available. The Middle East saw a 29 percent decrease in IEP students from 2017 to 2018, and North Africa saw an 8 percent decline. There was also a 32 percent drop in students going to the United States for IEP programs from North Africa and an 18 percent drop in students from the Middle East. The coming years will likely see the establishment of more faculty exchange and U.S. training partnerships between local institutions and the United States.

U.S. colleges and universities will continue to see interest from students in countries offering government scholarships; however, stricter eligibility requirements and limitations on location of study impact students' choice of institution. Given recent domestic economic challenges, countries are making policy changes to the conditions of their government scholarship programs. Scholarship recipients are held to strict standards regarding 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 what their programs of study will be. In Oman, Saudi Arabia, and the UAE, students no longer apply directly to the

scholarship program. Admission must be granted from the institution first. These changes to the scholarship programs have resulted in fewer students being able to study in the United States 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 so they can gain the knowledge and skills needed 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 fields 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 they sometimes struggle to find the right partner.
- The weakening of local currencies in Egypt, Lebanon, Tunisia, and Yemen has led to an increase in financial need, causing students to consider a wide range of destinations that offer full scholarships. In contrast, many Gulf countries—such as Kuwait, Saudi Arabia, and the UAE—have currencies that are pegged against a basket of currencies, creating greater stability for students contemplating studying abroad. In 2018, in response to a decline in oil revenue, Gulf countries began implementing a value-added tax of 5 percent on most

goods and services, boosting non-oil economies. On July 1, 2020 the VAT in Saudi Arabia increased to 15 percent, reflecting the current economic state of the country.

- Many governments sponsor college and university fairs and value the participation of U.S. institutions. 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 the UAE. U.S. institutions can also send faculty to EducationUSA-sponsored events, where staff can arrange faculty-to-faculty dialogues and provide U.S. higher education representatives 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.

Virtual Engagement and Social Media Usage

According to the *Digital in 2020* report by We Are Social and Hootsuite, there were 297.5 million internet users in the MENA region in 2019. Internet penetration in the region is generally sufficient, with Yemen and Syria having the lowest percentage. A majority of users get online through mobile devices, but in larger cities, internet is available at home, in cybercafes, on university campuses, and

36.0%

Algeria 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	2014/15	2018/19	%Change
Algeria	175	238	36.0%
Oman	2,200	2,963	34.7%
Egypt	2,974	3,675	23.6%
Tunisia	592	703	18.8%
Lebanon	1,416	1,672	18.1%

Middle East and North Africa



at other learning centers. Reliable access to webinars, large files, or certain online systems is a challenge for those who are in areas affected by power outages, slow connection speeds, or bandwidth limitations. For example, connection speeds are generally slowest in Algeria, Iraq, and the West Bank. EducationUSA advising centers can receive promotional videos or large electronic files and assist students in opening and viewing them.

Facebook is the most visited website across the region. 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 and Instagram also have a large following in MENA, while WhatsApp and Facebook Messenger are the most widely used chat platforms. Snapchat reaches high audiences in Egypt, Iraq, and Saudi Arabia. As reported in the *Digital in 2020* report, these countries fall in the top 20 globally in Snapchat usage. Qataris are very engaged on Twitter and Instagram, with TikTok growing in popularity.

Although all EducationUSA centers incorporate virtual advising elements, the advisers for Iran, Libya, and Syria continue to work almost exclusively in a virtual capacity, assisting students through social media and other online communication tools. EducationUSA virtual centers reach students using a variety of platforms,

including Facebook, Google Hangouts, IMO video calls, Skype, WhatsApp, and Zoom. While the number of internet users grows in MENA, there are still places, such as Egypt, where only 54 percent of the population is connected.

The EducationUSA virtual advising centers for Iran and Syria focus on providing support and information to students and scholars in a purely virtual capacity. The centers incorporate online tools, campaigns, and interactive social media platforms to communicate with prospective students and conduct outreach in the region and among the diaspora. Advisers for both centers are based in Washington, DC, and offer virtual office hours.

EducationUSA Iran provides information about U.S. higher education via a dedicated website in Farsi (Persian) and English (www.educationusairan.com), and the adviser meets with Iranian students virtually and school representatives through campus visits and EducationUSA conferences. To reach Iranian nationals all around the world, EducationUSA Iran uses global advertising campaigns through outlets such as Radio Javan.

According to the EducationUSA Iran center, interest in undergraduate programs in the U.S. has increased, and 23 percent of inquiries submitted to the center are about undergraduate study options. Telegram and Instagram are top platforms for

Iranians whose access to some social media platforms—including Facebook, Twitter, and YouTube—is limited. It is strongly recommended that HEIs keep social media platforms updated and boost posts related to Iranian students. Although F, M, and J visas are still granted to Iranian nationals, student visa numbers dropped in AY 2018-2019 and are expected to continue dropping over the coming years. HEIs can get more information on the EducationUSA Iran website, www.educationusairan.com.

EducationUSA Syria primarily reaches its audience through Facebook and Twitter, and added Instagram this year. The majority of Syrians following EducationUSA are located in Germany, Syria, and the United States.

Syrians continue to be interested in pursuing their studies in the U.S., primarily for graduate studies; however, Presidential Proclamation 9465 restricts all visa types for Syrians.

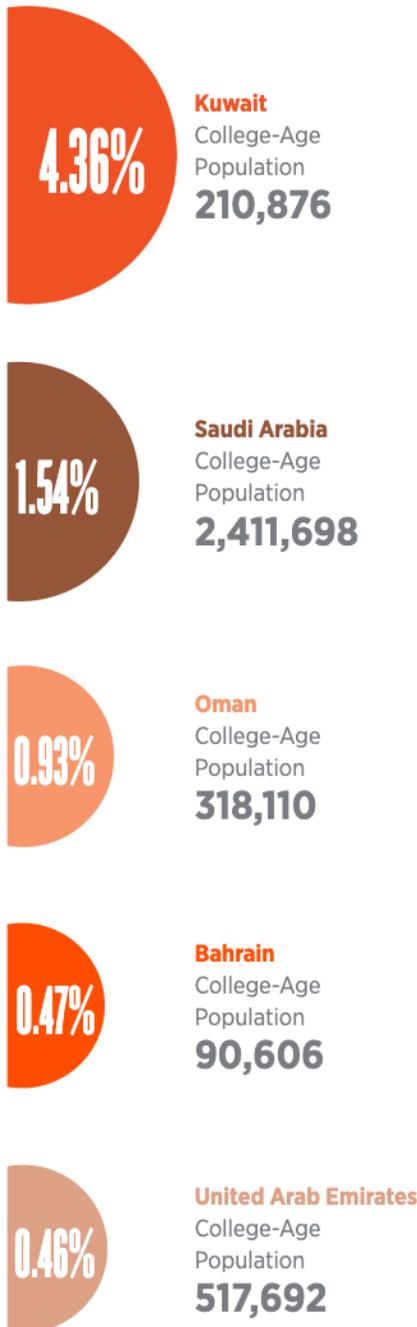
EducationUSA advisers for Libya and Yemen operate in a hybrid virtual setup. Both advisers are based at AMIDEAST centers and are able to provide both in-person and virtual outreach to students. The Libya adviser is based in Tunisia and co-programs with the Tunisia adviser, offering joint sessions for both populations in Tunisia. In Yemen, the adviser is limited to in-person sessions in the south. Students join online sessions, participate in massive open online courses (MOOCs), and continue to be interested in U.S. study. Libyans and Yemenis are eligible for F, M, and J visas, although some students have misinterpreted the policy and anticipate challenges in visa issuance.

Given the value of face-to-face communication, interactive platforms such as EducationUSA webinars offer creative outlets to engage students while informing them about educational opportunities in the United States. EducationUSA in MENA continues to develop innovative ways to reach students, including the recent launch of a mobile application that provides students and parents information about upcoming fairs and tours in the UAE.

Successful Recruiting Strategies

- HEIs should consider high school guidance counselors as a resource. The EducationUSA network engages

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: 2017 Population of the official age for tertiary education, both sexes

counselors and provides these key stakeholders with college advising resources. Local counselors meet frequently to share best practices in the admissions process and to discuss topics such as applying for student visas, writing school profiles, meeting application deadlines, and identifying institutions that best meet students' needs.

- Translate websites to Arabic, Farsi, or Kurdish, and record videos of students from MENA 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 (e.g., academic, extracurricular, social, security, and medical services) for students who bring families and chaperones, as well as for those who travel alone. Conduct focus groups with new students to ask them how to simplify the application and settling-in processes.
- Family members play an important role. Parents are a part of the students' decision making. Graduate students often have their spouses and children with them and look for institutions that provide support for their families. Consider crafting recruitment messages with these audiences in mind.
- Cultivate relationships with current international students and international alumni, and visit alumni when recruiting abroad. Alumni may hold key positions in the public and private sectors and appreciate the opportunity to engage with admissions officers from their alma maters. Don't underestimate word of mouth when it comes to recruitment plans.
- Engage current international students on campus, as they can provide insight and advice to prospective students from their home countries and regions during recruitment and student orientation seasons.
- Consider recruiting in North Africa, a largely untapped market. The region does not get many HEI visits but has great potential. Contact EducationUSA to assist with a trip to Algeria, Egypt, Morocco, or Tunisia. In March 2019, the

EducationUSA MENA Regional Forum was held in Casablanca, Morocco. More than 50 U.S. HEIs 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 students in attendance.

Institutional Partnerships

Many universities in MENA seek linkages with U.S. institutions. EducationUSA REACs and advisers provide local institutions 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 2019, there were several IVLP projects focused on building capacity in the higher education sector for MENA professionals.

Unlike the United States, countries in the MENA region have government ministries that centralize the curriculum, standards, accreditation, teacher/faculty training, and overall goals for the education sector. As a result, governments are a key stakeholder for any institution that wants to establish a partnership with a local university. EducationUSA REACs and advisers can make introductions for those with an interest in a specific country, program, or field of study. In many cases, the U.S. embassy or

Regional Student Totals Top Five Countries of Origin

Country	2018/19	% Change
Saudi Arabia	37,080	-16.5%
Iran	12,142	-5%
Kuwait	9,195	-9.8%
Egypt	3,675	-0.7%
Oman	2,963	-4.3%

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consulate in that country can also connect interested parties.

It is important to note that despite the desire to establish partnerships, some countries in MENA are not necessarily clear on the process to form such arrangements or the parameters involved. Communication is important. All parties should outline commitments clearly, so expectations and terms of the agreement are apparent. U.S. HEIs should be prepared to highlight their strengths and present suggestions for mutually beneficial arrangements. In some cases, there are clear goals for institutional linkages. For example, several countries in MENA are interested in partnerships to further develop English language teaching. This could be accomplished through faculty exchanges, specific in-country workshops, or other distance programs. In addition, research collaborations are of great interest in the MENA region.

Here are more examples:

- In February 2020, a delegation from Columbia University's Teachers College visited Algeria and Tunisia for numerous meetings to explore needs and opportunities for English language training at the university level. Columbia University's Global Centers in the region are based in Amman and Tunis, providing opportunities for local engagement with Columbia's faculty and students.
- In Iraq, a new partnership between Franciscan University of Steubenville and Catholic University in Erbil provides both communities opportunities for learning and engagement. This partnership focuses on exchanges for students and faculty, cultural exchanges for students, Arabic and Aramaic courses in the United States, and support for Iraqi students to take courses in person or online with Franciscan University.
- The UAE launched new initiatives with U.S. partners across all educational

levels, including the establishment of a comprehensive special education program in partnership with the New England Center for Children in Massachusetts. Other programs are designed to give Emirati students the opportunity to obtain U.S. certificates while remaining in the UAE, for example, a partnership between the Massachusetts Institute of Technology and Masdar Institute of Science and Technology in Abu Dhabi focused on clean energy technologies.

Foreign Government and Private Funding

Bahrain, Egypt, Iraq, Kuwait, Oman, Qatar, Saudi Arabia, and the UAE currently fund government scholarship programs. These governments maintain lists of approved receiving institutions. It can be difficult for universities to gain inclusion on such lists, an issue that constitutes a major barrier to recruiting 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.

Bahrain. The government of Bahrain, through the Crown Prince's International Scholarship Program (CPISP), sends 10 students to college overseas each year. Fortunately, most of these students choose to study in the United States. In AY2019-2020, seven out of 10 CPISP grantees chose to study in the United States. All scholarship students enter at the undergraduate level and can receive full funding through completion of a Doctoral degree.

Oman. Since 2012, Oman's Ministry of Higher Education (MoHE) has increased the number of scholarships for Omanis to pursue undergraduate and graduate studies in the United States. It is estimated that more than 75 percent of Omanis studying in the United States benefit from some type of scholarship program. Most scholarships are awarded to support "Omanization," an initiative to increase the number of

U.S. Study Abroad

Top Five Receiving Countries in the Region

Destination	2017/18	% Change
Israel	3,355	11.9%
Morocco	1,411	-20.3%
Jordan	1,017	38.4%
United Arab Emirates	939	8.6%
Egypt	123	-29.3%

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
Egypt	37	123	232.4%
United Arab Emirates	735	939	27.8%
Israel	2,876	3,355	16.7%
Morocco	1,255	1,411	12.4%
Jordan	1,085	1,017	-6.3%

Omani citizens employed at industries in Oman. For undergraduate study, there are three types of government-funded scholarships: STEM; Education, Social Sciences, Art, and Management (ESAM); and Direct Entry. If students are awarded STEM or ESAM scholarships, the MoHE chooses the school the students attend. The Direct Entry scholarship is for students who selected and were admitted to an approved higher education institution on their own. At the graduate level, the MoHE offers a National Postgraduate scholarship.

Iraq. The Ministry of Higher Education and Scientific Research (MoHESR) in Iraq started a program in the last year that awards 8,000 scholarships for government employees. The students can pursue study at any level, for any major, in any country. In addition, MoHESR opened an English language center to provide scholarship students the requisite English language training before they apply to institutions in the United States. This language center is still pending Educational Testing Service (ETS) certification.

Kuwait. The Ministry of Higher Education offers a scholarship for undergraduate studies that includes English language instruction during the first year. In 2018, the Kuwaiti government began requiring that all scholarship recipients receive a score of five or higher with the International English Language Testing System (IELTS) or a 45 or higher on the Test of English as a Foreign Language (TOEFL) to receive a scholarship to study abroad. This reduced the demand for scholarships to study outside of Kuwait, as there is a generally low standard of English among Kuwaiti public school students, who comprise about 85 percent of scholarship recipients. Scholarships to universities in Kuwait are on the rise as local universities upgrade their facilities and increase their capacity. Pharmacy studies is no longer an approved major for Kuwaiti scholarship recipients wanting to study in the United States, and stringent requirements to pursue medicine and dentistry are causing more Kuwaiti students to pursue these majors in other countries, particularly the UK and Ireland. The MoHE also offers graduate scholarships to students who were under the Ministry's undergraduate sponsorship. Additionally, government



agencies and private institutions—such as Kuwait University, Kuwait Institute for Scientific Research, the Civil Service Commission, the Public Authority for Applied Education and Training, and the Kuwait Investment Authority—offer scholarship opportunities for graduate students.

Qatar. The government of Qatar offers scholarships to Qatari students for studies within and outside of Qatar. Criteria for eligibility include high school exit scores of 75 percent or higher, English language proficiency equivalent to an IELTS score of 5.0 (or equivalent), and unconditional acceptance to one of the approved universities in a major listed in the scholarship program. In addition, male students have to complete one year of national service or be given a waiver before they can pursue postsecondary studies. While female students have the option to complete national service, they are not required to serve before continuing their education. For this program, students must also commit to work at one of 30 government entities upon graduation. Other companies (such as Qatar Airways and Sidra Medicine), the banking sector, and the gas and petroleum sector offer their own scholarship programs, but most use the requirements of the government program.

Saudi Arabia. The government of Saudi Arabia remains committed to funding its foreign scholarship program for the

next several years and is restructuring the program to better align with the country's economic goals. Increasing job placement after graduation and fulfilling labor market demands remain top priorities. To be eligible for a scholarship, students must attend one of the world's top 200 universities, with rankings determined by the Ministry of Education (MOE). Students can also receive a scholarship by gaining full admission to an "elite university," a top 20 global university, as defined by the Ministry (including 14 U.S. institutions). The MOE is also working on a few major additional scholarships, including the Qiddiya-General Entertainment Authority (GEA) Scholarship, the Royal Commission for AlUla Scholarship, and the NEOM Scholarship. The United States remains the most popular destination for Saudis studying abroad. Students who value a U.S. degree seek government and private scholarships, but those who have the financial means self-fund their U.S. education.

UAE. The United States remains the top destination for Emirati students who study abroad. Of the 2,361 Emiratis studying in the United States in 2019, 79.3 percent were pursuing undergraduate studies, and 12.3 percent were pursuing graduate studies, with the majority on full scholarship. UAE students are eligible for 13 full scholarships to study in the United States, some of which are specific to a particular emirate. Benefits differ depending on the UAE government

Middle East and North Africa

entity awarding the scholarship. The Ministry of Education scholarship is a preferred option because it is open to all UAE students. Students on a UAE Ministry scholarship are eligible for full tuition, a monthly stipend of more than USD\$3,200, an annual airline ticket, books and clothing, medical insurance, and other benefits. UAE students on scholarship must attend one of the 50 U.S. universities on the MOE-approved list and pursue majors set by the scholarship-granting institution. To qualify, students must gain admission at the approved institution and have English language proficiency and a high grade point average in grade 12. Similarly, the Abu Dhabi Department of Education and Knowledge (ADEK) restricts its scholarships to a list of 150 schools, based on a variety of academic rankings. The approved majors are determined by projected UAE job market needs and tend to favor STEM fields.

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 STEM fields. Abu Dhabi National Oil Company, Saudi Basic Industries 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. Companies in Qatar—such as Qatar Airways, Sidra Medicine, Qatar Petroleum—are implementing similar programs.

Regional Economics and Market Demands

Students in the MENA region have typically been interested in STEM fields when looking for programs of study. In Gulf countries, most government scholarship programs specify the approved majors based on the country's labor market needs or demands. Over the last several years, there has been a push from Ministries of Labor to implement policies to nationalize jobs and sectors covered by third-country nationals. These areas include innovation, entrepreneurship, space science, alternative and renewable energy, engineering, artificial intelligence, health sciences, and business information technology.

In addition to the popular STEM fields, some emerging areas constitute

key opportunities for U.S. institution recruitment, including cybersecurity, the arts, and English. Peace studies is evolving as a field of study, especially in current and former conflict zones. New fields of study are emerging in Saudi Arabia as the country opens its borders to outside visitors and tourists. There is a growing need for training in tourism, because historical sites, national parks, theme parks, and musical concerts are new markets in the country. As a result, Saudi Arabia's GEA financed 60 students' University of Central Florida undergraduate studies in entertainment disciplines to support a planned mega-project outside of Riyadh.

Regional EducationUSA Events

EducationUSA centers plan several in-person events throughout the year across the MENA region. 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 Iran, Libya, Syria, and Yemen, where the majority of outreach is done online. Watch a pre-recorded EducationUSA webinar during which the REAC and in-country adviser provide a one-hour briefing on a specific country and include information on the local educational system. To date, there have been webinars on Algeria, Egypt, Iraq, Kuwait, Lebanon, Morocco, the Palestinian Territories, Saudi Arabia, Tunisia, and the UAE. MENA REACs distribute a MENA HEI newsletter six times a year to all who register. More detailed information about events happening in the region and recent trends can be found there.

After 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. Below upcoming fairs

and exhibitions with EducationUSA participation are highlighted.

Fairs and Conferences

Bahrain. EDUTEX Bahrain Education and Training Exhibition is scheduled to be held at the Bahrain International Exhibition and Convention Center in March 2021. The University of Bahrain Career Fair is scheduled to take place in April 2021.

Egypt. The AMIDEAST Egypt StudyUSA Fair is scheduled to be held virtually in October 2020.

Iraq. The government hosts the Baghdad International Fair annually, which usually takes place in October 2020.

Kuwait. How Do I Plan My Future? is scheduled to take place in Kuwait City in March 2021. EdEx is scheduled for October 2020 and April 2021.

Oman. The Global Higher Education Exhibition, Oman's largest higher education expo, is scheduled for April 2021 (www.ghedex.om).

Qatar. The University Expo Qatar will be offered as a virtual event October 21–22, 2020. EducationUSA Qatar anticipates hosting its first U.S. university fair in spring 2021.

Saudi Arabia. The International Exhibition and Conference on Higher Education is an MOE-hosted university fair with hundreds of local and international universities participating. The fair is held every other year, and the next one is expected to be held in April 2021 in Riyadh. The Gulf Education Conference in Jeddah is scheduled for February 2021.

UAE. NAJAH, the official government-sponsored education expo attracting more than 1,600 visitors, will take place in Abu Dhabi October 28–30, 2020 as a hybrid in-person/virtual event. Expo2020, originally scheduled to be held in Dubai in October 2020, has been postponed to October 2021–March 2022. The hosts expect the participation of 192 countries and the attendance of an estimated 15 million visitors. The United States pavilion will offer opportunities to engage with students and EducationUSA, as well as key educational events, including NAJAH Dubai, International Education Week, and ReWirEd.

All Countries. Many EducationUSA centers in the region host regular web chats and videoconferences 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 obtaining 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 students have not contacted EducationUSA at any point in the application process, they are welcome to attend a pre-departure orientation.

Many centers host monthly meetings with counselors from surrounding secondary schools. These meetings are a great way to get familiar with the 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)

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

Bahrain, Kuwait, Qatar, Saudi Arabia, and the 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 due to the large expat community. Consider the Indian school timetable as well as exam preparation times.

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

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

Israel. The best times to visit are from November to January and March to May. Avoid major holidays, such as New Year and Passover, the dates for which can vary each year.

Jordan. The best times to visit are from October to November and February to May. Avoid traveling during major religious holidays (e.g., 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.

Morocco. The best times to visit are from October to November and March to April. Avoid visiting during Ramadan and the Eid holidays.

Oman. Visit during the Global Higher Education Exhibition, Oman's largest higher education expo, which is typically held in April (www.ghedex.om). Another good time to visit is during EduTrac, which will take place October 25-27, 2020, in Muscat (www.edutracom.com/).

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

Tunisia. The best time to visit is from October to November and January to mid-February. 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 other regions. MENA hosted only 2.1 percent of all U.S. study abroad students in AY 2017-2018. The region saw an increase for the second year in a row, with a 4.4 percent increase from the previous year. Key increases include Jordan (38.4 percent), Israel (11.9 percent), and the UAE (8.6 percent). Several U.S. students also study or participate in exchange programs at the six American universities at the Qatar Foundation. These universities have exchange programs with their home campuses and see a flow of students between the U.S. and Doha campuses throughout the year. There are fewer opportunities for U.S. students to study at other HEIs throughout the country because instruction at local institutions is conducted primarily 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 a local advising center.

In 2019, the U.S. embassies in Morocco and Israel received Study Abroad Engagement Grants from the USA StudyAbroad Branch at the U.S. Department of State to carry out capacity-building projects to promote U.S. study abroad in the region.

South and Central Asia

Regional EducationUSA Profile

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

31

EducationUSA Advising Centers in the Region

21 Comprehensive
9 Standard
1 Reference

EducationUSA advising centers in South and Central Asia (SCA) are located at U.S. embassies (Afghanistan, Bangladesh, and Uzbekistan) and consulates (India), Fulbright Commissions (India, Nepal, Pakistan, and Sri Lanka), American Councils for International Education offices (Kazakhstan, Kyrgyzstan, Tajikistan, and Turkmenistan), and local nonprofit organizations (Afghanistan, Bangladesh, India, and Kazakhstan). There are 78 advisers at 31 EducationUSA centers in SCA, with several countries hosting multiple advising centers at various host institutions. The largest concentration of centers is in India, Pakistan, Bangladesh, and Kazakhstan. India has 34 advisers across seven centers, Pakistan has 14 advisers across three centers, Bangladesh has eight advisers across four centers, and Kazakhstan has four advisers across four centers. Advisers in SCA function as mentors and local experts in U.S. higher education, providing advising sessions, 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. Nepal and Pakistan host Opportunity Funds cohorts for undergraduate students. Cohorts engage in robust mentoring activities over a two-year period and interact with Opportunity Funds alumni. Sri Lanka and Turkmenistan host Opportunity Funds cohorts for graduate students, offering mentoring activities for up to one year. U.S. higher education institutions (HEIs) are encouraged to reach out to the advising centers to learn more about how to support Opportunity Funds students through virtual programs and specialized scholarships.

EducationUSA advising centers in SCA conduct strategic outreach in their respective countries in close collaboration with Public Affairs and Consular Sections at U.S. embassies and consulates. U.S. HEI representatives assist advising centers in conducting outreach by joining visits and participating in webinars for 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

South and Central Asia is a region of vast cultural and geographic diversity, and it is home to one of the largest youth populations in the world. Young people in the region are driven and eager to enter the workforce. Limited access to higher education is a significant challenge. Countries across SCA recognize the need for educational reforms and curricula that equip students with the skills needed for the workforce. People-to-people ties and international student exchanges 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.

While SCA stretches from Kazakhstan in the north to Sri Lanka in the south, students from this region share common traits: they seek similar fields of study (notably, science, technology, engineering, and mathematics [STEM], and business) and look for



the development of practical skills that translate into jobs. They and their parents are impressed by the perceived prestige of particular academic programs and view the award of a scholarship—even a partial tuition award—favorably. But the region’s differences are also pronounced. Across SCA, 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 and Afghanistan are the most likely to seek out intensive English 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 specific challenges not just in relation to limited capacity and access to quality higher education locally but also in terms of access to resources. Environmental and conservation concerns are increasingly felt across the region, and concerns about water shortages, floods, landmass erosion, and failing crops have

led to greater migration from rural to urban areas, intensifying 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.

Internet accessibility varies considerably across SCA. In South Asia, the internet is widely and easily accessible 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. The average speed of internet connectivity is different for big and small cities. Power disruptions are decreasing; however, some countries continue to face outages during peak summer and winter months. In Central Asia, lower internet penetration rates and prohibitively expensive mobile data prevent many Central Asians from being able to fully participate in online education and other networking efforts.

In addition to these concerns, government-imposed restrictions limit online activity in some SCA countries. Limitations on internet speed, certain applications, and services impact student use. This situation affects students’ ability to access online applications, conduct research, take tests, and interact virtually. EducationUSA centers in the region offer students an alternative and reliable way to connect virtually and provide students access to computers with internet connectivity. This is particularly necessary in Central Asia, where EducationUSA centers are sometimes the only places students can apply to international universities.

Students are increasingly going abroad to study and obtain the skills needed to implement change at home. Trained specialists in resource sustainability, finance, business administration, healthcare services, English language studies, water management, law, engineering, and social services are required to meet regional challenges. The

South and Central Asia

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 are well-positioned to recruit in the region.

Although the United States remains the number one choice for higher education abroad, students and families express concerns about perceived attitudes toward international students and visitors. 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, the United Kingdom, Australia, and Russia. However, over the past few years, China, Japan, Malaysia, the Republic of Korea, and India have attracted more students. These countries offer government scholarships and affordable tuition to students from the region. Such offers, combined with proximity to the students' home countries, make these options increasingly attractive. Kazakhstan and Kyrgyzstan in particular have increased their higher education offerings in recent years and are becoming attractive to students who wish to stay closer to home.

Engagement with consultants or agents is increasingly common among prospective students, especially in India and Pakistan where consultants and agents provide a range of services. U.S. institutions can publicize their relationships with consultants and agents

to help international students understand the relationship.

Recent Trends

According to the most recent *Open Doors* report, in the United States, 21.8 percent of the total international student population originates from SCA. *Open Doors* reported a 3 percent increase in mobility from this region, with 238,621 students from SCA studying in the United States in academic year (AY) 2018-2019.

Of the SCA students studying in the United States, 44.2 percent are in graduate programs, and 37.6 percent are enrolled in Optional Practical Training (OPT). Undergraduate students make up only 16.9 percent of total students from SCA.

Bangladesh (+10 percent), Kyrgyzstan (+27.8 percent), and Turkmenistan (+19.7 percent) saw the fastest growth in the region for AY 2018-2019.

Bangladesh, India, Nepal, and Pakistan were among the top 25 countries in the world sending students to the United States in AY 2018-2019, according to the *Open Doors* report. India and Nepal are the second and 12th largest senders, respectively. Bangladesh and Pakistan are the 20th and 22nd largest senders, respectively.

Kyrgyzstan (+26.3 percent), Tajikistan (+12.1 percent), and Turkmenistan (+14.6 percent) have seen a notable increase in undergraduate student mobility.

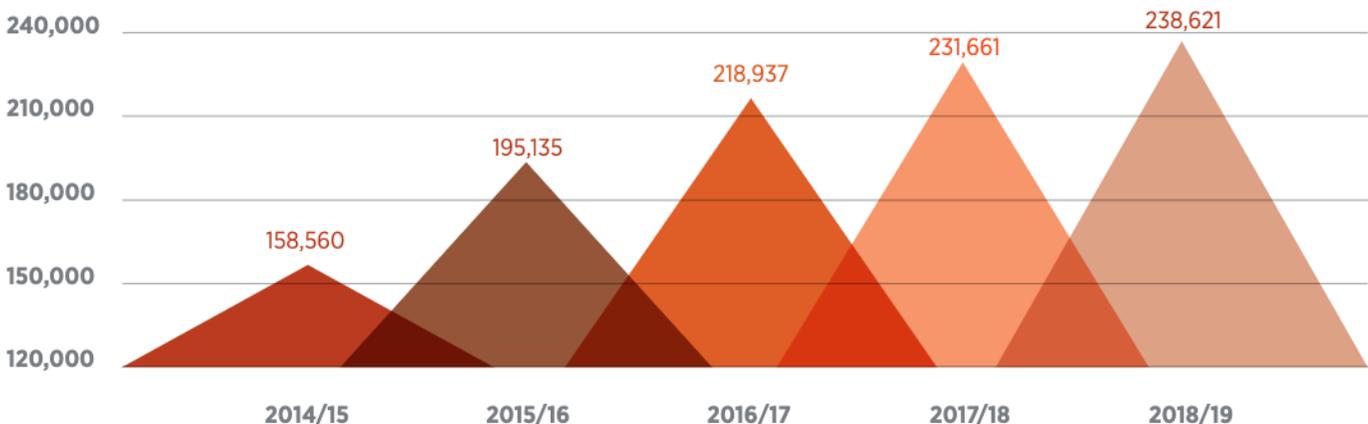
India (+6.3 percent), Nepal (+1.3 percent), and Pakistan (+2.2 percent) saw increases in undergraduate student mobility in AY 2018-2019.

Bangladesh, India, Nepal, Pakistan, and Sri Lanka were among the top 25 countries in the world sending graduate (Master's and Doctoral) students to the United States in AY 2018-2019, according to the *Open Doors* report. Other SCA countries with increases in graduate mobility include Kazakhstan (+13.1 percent), Kyrgyzstan (+35.6 percent), and Turkmenistan (+24.1 percent).

In AY 2018-2019, enrollment by students from SCA in non-degree programs saw a significant increase. There was an 87.7 percent increase in enrollment in such programs by students from Bangladesh and an 88.9 percent increase in students from Kyrgyzstan. India, Nepal, and Turkmenistan also saw increases in AY 2018-2019. These increases can be attributed to interest in professional development, as the workforce is changing and trying to keep up with global trends. Students from the region pursue certifications, short-term exchanges, and summer courses to prepare for the changing environment.

Several factors led to 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 doctoral programs. A lack of opportunity to pursue research in their home countries leads many students to seek foreign research

Student Mobility in the Region (Five-Year Trend)





institutions, especially those in the United States. Savvy students understand that careers can be built on the important connections made during graduate studies, so they 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 language secondary schools focus 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. Many opt to apply to institutions in states with existing diaspora communities from the local culture or institutions with large international populations. Institutions able to demonstrate and address concerns about the safety of international students and their successful integration into the surrounding community will have an advantage.

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

Countries in the Spotlight

Bangladesh. Bangladesh has a long tradition of English language education, a booming education sector, and a rising middle class, all of which combine to make it a prime target for student recruitment. UNESCO reports more than 57,000 students studying abroad from Bangladesh, with the highest numbers in Malaysia, followed by the United States, Australia, the United Kingdom, and Germany. The *Open Doors* survey reports a steady flow of Bangladeshi students coming to study in the United States, with an increase of 10 percent in AY 2018-2019. Graduate students made up 64 percent of Bangladeshi students in the United States, an increase of more than 13.5 percent over the previous year. Non-degree programs saw an increase of 87.7 percent, while OPT programs saw an increase of 12.7 percent. Undergraduate students account for 20.7 percent of Bangladeshi students in the United States. While the total number of undergraduate students from Bangladesh studying in the United States declined by 3.2 percent in AY 2018-2019, there is room for growth in this sector.

The most popular fields of study are engineering and business, with a growing interest in the humanities and social sciences. While some families can afford to fully fund students' studies in the United States, receiving a scholarship is a matter of pride and prestige. Students pursue higher education opportunities in Australia and the UK because there is easy access to visas and residency opportunities, and because of 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 being 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's 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

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Ph.D. applicants to foreign HEIs, mainly because of the local universities' requirement for a foreign Ph.D. degree to join the faculty.

India. It is estimated that more than half of India's 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. Currently, there are 138 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 such 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 push 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 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 study or seek multidisciplinary programs to further diversify their knowledge base. Students are increasingly attracted to new fields of study in disciplines such as artificial intelligence, data sciences, and data analytics. There is growing interest in practical applications in emerging fields. For example, students are interested in game design and development, animation, filmmaking, graphic arts, music, and sound engineering. Finances, physical safety, research opportunities, and practical training opportunities (such as Curricular Practical Training, or CPT, and OPT) are important factors in students' decision-making. Student profiles and their fields of interest vary from region to region within India. There is also a growing interest in international undergraduate programs among high school students, an important trend in a country that has historically seen most students choosing universities abroad for graduate-level programs.

The majority of Indian students will take out bank loans to finance a portion of their overseas education. On average, students and their families 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.

According to UNESCO's report on outbound internationally mobile students for tertiary education by region, the number of Indians studying abroad has increased by 400 percent since 2010. This number is likely to increase, highlighting a significant area of opportunity for U.S. higher education institutions, which host more than 42 percent of all Indians studying abroad.

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, the relevance of higher education offerings, vocational education, and collaborations with reputable HEIs internationally for research and exchanges. 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 Kazakhstani students studying in the United States increased by about 1 percent in AY 2018-2019. Although undergraduate numbers decreased by 6.3 percent and non-degree program numbers decreased by 26.7 percent, graduate student numbers increased by 13.1 percent and OPT numbers by 19.6 percent. The government of Kazakhstan has undertaken reforms at all

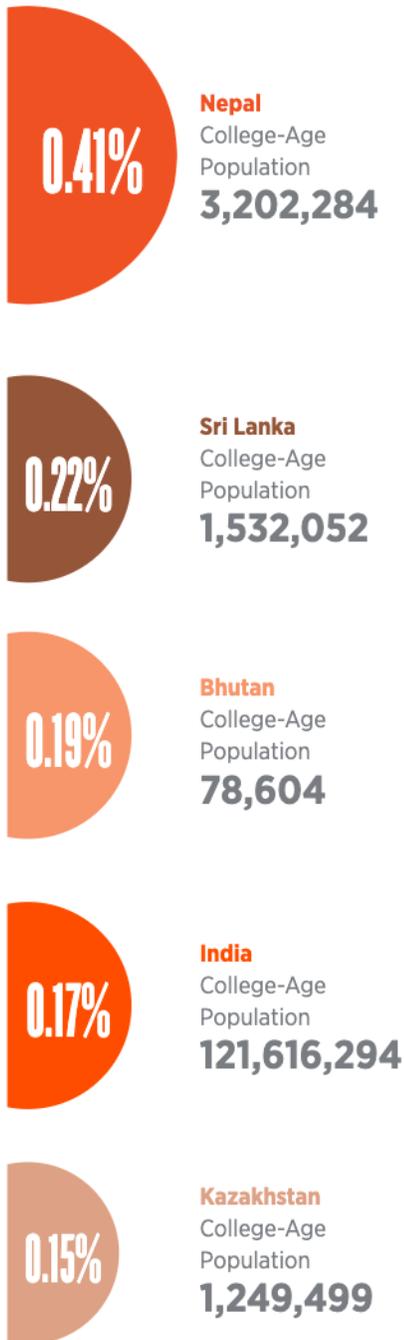
Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students in the Region (Five-Year Trend)

Country	2014/15	2018/19	%Change
Nepal	8,158	13,229	62.2%
India	132,888	202,014	52.0%
Bangladesh	5,455	8,249	51.2%
Pakistan	5,354	7,957	48.6%
Turkmenistan	201	280	39.3%

62.2%

Nepal 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: 2017 Population of the official age for tertiary education, both sexes

educational levels and has established a goal of making the country trilingual by 2050. As a result, schools throughout the country began teaching science classes in English last year. 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 percent of the senior year students seek an education overseas.

Kazakhstani 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 offer free education to the country's high-performing youth; however, because of limited seats and highly competitive admissions standards, many elite Kazakhstani 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. Since the currency devaluation in 2014, the Kazakhstan tenge has lost nearly half its value against the dollar, resulting in an increase in education expenses in the United States for Kazakhstani students. As a result, students from Kazakhstan are exploring study abroad options in countries with lower tuition rates and are becoming more open to considering affordable options in the United States, such as community colleges. Most consider studying domestically or in China, Russia, Germany, Malaysia, or the Republic of Korea. More than 66,000 students from Kazakhstan study abroad each year, but fewer than 3 percent of those students study in the United States.

Graduates of Intellectual Schools and other selective schools seek graduate studies abroad. Many undergraduate institutions, including English-medium Nazarbayev University, offer strong STEM and other programs. Undergraduates from these institutions also seek graduate study abroad.

Kyrgyzstan. The number of Kyrgyzstani students studying in the United States

has grown steadily over the past two years, increasing 34 percent between 2017 (216 students) and 2019 (290 students). In AY 2018-2019, 49.7 percent of Kyrgyzstani students studying in the United States were enrolled in undergraduate programs, 27.6 percent were in graduate programs, 17.6 percent were in non-degree programs, and 5.2 percent were in OPT.

EducationUSA offers various opportunities, available through the country's cohort advising programs, referred to as College Prep Clubs (CPCs). In 2019, an average of 80 students engaged with CPCs in Bishkek and Osh. Advisers assist promising high school students, many from low-income backgrounds, with their applications to U.S. HEIs by offering free, results-based, intensive group advising. In addition, centers have seen an increase in visiting U.S. college and university representatives, allowing more in-person engagement with prospective students and their parents.

EducationUSA Kyrgyzstan will continue to promote Kyrgyzstan as a destination for HEI representatives and to foster relationships between the United States and local educational institutions. EducationUSA is exploring virtual fair options, and will share additional details as they become available.

Pakistan. In AY 2018-2019, there was a 7.4 percent increase over the previous year of Pakistani students (7,957) studying in the United States, according to the *Open Doors* report. The increase was split among undergraduate (2.2 percent), graduate (0.2 percent), non-

Regional Student Totals Top Five Countries of Origin

Country	2018/19	% Change
India	202,014	2.9%
Nepal	13,229	-0.3%
Bangladesh	8,249	10%
Pakistan	7,957	5.6%
Sri Lanka	3,334	0.8%

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degree (11.3 percent), and OPT programs (28.5 percent). The data clearly reflects students' career interests and intent to take advantage of practical training after their studies.

The major cities of Karachi, Lahore, and Islamabad/Rawalpindi have large populations of students who apply to study abroad, and cities such as Faisalabad, Sialkot, Gujrat, and Gujranwala also have large numbers of prospective students interested in pursuing higher education at foreign institutions. Colleges and universities planning to recruit in Pakistan should consider a broad range of cities for recruitment.

The U.S. Educational Foundation in Pakistan administers several U.S. government academic exchange programs and hosts all three of Pakistan's EducationUSA advising centers. Through these exchange programs, 19,000 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 36 television news channels now available in the country. These well-informed young Pakistanis are increasingly interested in U.S. study options and are able to make discerning choices when comparing international study options.

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 for engineering and business majors, 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, and joint research, and increased mutual understanding between Pakistan and the United States through sustainable peer-to-peer relationships. So far, 23 partnerships have been established, and their success is expected to lead to more institutions seeking comparable programs.

The vision of education in Uzbekistan that began four years ago under new leadership continues to evolve and change. In 2019, the Ministry of Higher and Secondary-Specialized Education introduced a five-year Education Sector Plan focusing on expanding the English language curriculum, increasing technical and vocational training, adding more educational institutions, and diversifying fields of study. That same year, the U.S. Department of State and USAID funded a multimillion dollar effort to support Uzbekistan's large-scale modernization of their education system. These projects

specifically focus on English language instruction in secondary schools and mathematics and reading instruction in primary schools. The number of private high schools continues to increase, with a focus on STEM fields.

The higher education system will introduce advanced international experience to the education process and improve the skills of teachers and scholars through closer relationships with leading foreign educational and scientific institutions. As a result, universities in Uzbekistan seek to establish partnerships with foreign universities. The U.S. Embassy is in the process of opening six American Corners across the country, and each will have a part-time EducationUSA adviser. Expanding the advising team and EducationUSA's reach across the country will assist in connecting with a broader group of students. Uzbekistan is Central Asia's most populous country. It has more than 30 million people, more than 64 percent of whom are under the age of 30. Close to 50 percent of Uzbekistani students in the United States are pursuing an undergraduate degree, including students at community colleges. While Uzbekistan will not likely become a major source country for foreign students in the next three to five years, Uzbekistanis will have improved English language skills and greater access to EducationUSA centers and advising services.

In Afghanistan, the Ministry of Education's priority is to increase the number 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 private sector who can lead the country to a more productive future. The government's aim is to raise university enrollment overall, with a focus on women and girls, and to expand graduate and doctoral programs. As the country rebuilds its educational infrastructure and increases capacity, local institutions will look to the United States and other countries to build partnerships and create linkages. The U.S. Embassy in Kabul will continue to use the 25 Lincoln Learning Centers (LLCs) spread throughout the country

to promote EducationUSA activities through an organized series of virtual sessions at the LLCs on topics related to university admissions, finding the right university fit, writing a strong personal statement, essay writing, application review, and testing.

China's ambitious Belt and Road Initiative, which aims to develop infrastructure across SCA, includes education as a priority element. Future collaboration and scholarships will attract prospective students to opportunities in East Asia. As a result, more opportunities for students will open up in China and participating countries.

Virtual Engagement and Social Media Usage

Across the region, the internet is widely available, but there are significant differences in speed and accessibility outside of big cities. Where it is available,

the internet is easily accessible and most commonly used through mobile devices.

Facebook, Instagram, Snapchat, WhatsApp, and YouTube 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.

Because they are unreliable, internet connections cannot 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.

U.S. Study Abroad

Top Five Receiving Countries in the Region

Destination	2017/18	% Change
India	3,986	-15.3%
Nepal	566	-2.6%
Bhutan	104	40.5%
Sri Lanka	85	-45.9%
Kyrgyzstan	63	117.2%

Five Countries (with over 50 students) with Highest Percentage Growth, U.S. Students in the Region (Five-Year Trend)

Country	2013/14	2017/18	% Change
Bhutan	38	104	173.7%
Kyrgyzstan	27	63	133.3%
Kazakhstan	37	50	35.1%
Nepal	460	566	23.0%
India	4,583	3,986	-13.0%

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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, most popular social media sites have been blocked or are heavily restricted. Despite many restrictions, EducationUSA centers are able to hold webinars and virtual meetings. Students primarily rely on traditional methods of advising: in-person sessions, telephone, and email.

YouTube is available in Pakistan. Many Pakistanis also use alternative websites, such as Vimeo and Dailymotion.

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 so that they are 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 EducationUSA advisers at centers in the region. Participate in informational seminars that showcase the breadth of U.S. higher education, 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 attracts quality 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.

- Engage alumni at EducationUSA fairs by having them represent the college or university they attended. Encourage alumni to visit EducationUSA centers to meet students and conduct information sessions.
- Offer 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. Students in the region are highly attuned to information about career prospects.
- 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. Webinars are advertised on center websites and through social media platforms.
- Expand the list of cities considered for recruitment visits. EducationUSA can advise on how to effectively go beyond 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.

Institutional Partnerships

While countries in SCA are eager to establish formal partnerships with U.S. institutions, needs and scope vary. Interested U.S. institutions are encouraged to work with the Regional Educational Advising Coordinator (REAC) and EducationUSA advising centers,

in collaboration with U.S. embassy colleagues, to assess and understand the needs of specific countries regarding partnerships. Effective and successful institutional partnerships are those in which both institutions invest time and cost-share expenses. The cost-share component ensures that partnerships can be sustained beyond the initial grant period.

India. U.S. institutions interested in partnerships in India need to be ready to invest time in developing such partnerships. EducationUSA observes that U.S. institutions have found it easy to work with private universities in India, even though the preference is to work with the better known federally funded institutions of national importance, such as the Indian Institute of Technology or the Aligarh Muslim University. In most cases, institutional partnership grants that the United States-India Educational Foundation (USIEF) deemed successful were those in which the principal representative of the U.S. institution had significant prior association with the Indian partner university. Prior association may encompass a U.S. staff member's experience as a study abroad student or visiting Fulbright scholar in India, or experience leading a group of U.S. study abroad students to visit the institution. This "insider" connection can help the U.S. institution navigate the sometimes complex bureaucracy in Indian institutions. U.S. universities can explore mutually beneficial partnerships and collaborative opportunities, such as twinning programs, faculty and student academic exchanges, research internships, summer programs, and internships (for high school students).

Pakistan. The U.S.-Pakistan university partnership initiative, funded by the Public Affairs section of the U.S. Embassy in Islamabad, established 23 long-term relationships between Pakistani and American HEIs. These three-year partnerships promoted faculty professional development, curriculum reform, and joint research, and increased mutual understanding between Pakistan and the United States through sustainable peer-to-peer relationships. Although these grants have come to an end, the institutions involved continue to collaborate frequently and support each other. The U.S. embassy continues to

support partnerships between U.S. and Pakistani universities, offering smaller grants, which are posted on www.grants.gov when available.

Central Asia. Common areas of interest for developing institutional partnerships in Central Asia involve enhancing teacher preparation, teaching methodology, and training to support language teaching and learning. For example, in September 2018, PAS Tashkent awarded a grant to American Councils to manage a U.S.-Central Asia University Partnerships Grants Program (UniCEN) to build capacity for substantive international engagement between higher education institutions in the United States and Central Asia. Funded through regional foreign assistance money, the program currently supports twenty-two projects led by U.S. higher education institutions. Through UniCEN, American Councils has created a growing network of more than 100 Central Asian universities seeking to improve their knowledge of U.S. higher education practices, increase internationalization, implement action plans for partnerships with U.S. higher education institutions, and collaborate on cross-border projects.

Foreign Government and Private Funding

Many governments in SCA allocate funding each year for students to pursue higher education overseas. Despite such assistance, students with government funding often attend institutions closer to home—in countries such as India, Turkey, and the United Kingdom—because of their lower tuition, proximity, and similar cultural traditions. 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 Support Division in the Royal Government of Bhutan's Ministry of Education, Department of Adult and Higher Education, hosts and manages scholarships offered by U.S. institutions specifically for Bhutanese students. If your institution is interested in designing a scholarship for Bhutanese students, please contact the New Delhi-based REAC to facilitate meetings with the Ministry of Education. For more information, visit www.education.gov.bt.

Kazakhstan. Since 2011, the government's Bolashak scholarship program has funded training 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 2018-2019, 320 students studied in the United States with support from the Bolashak program. The program includes funding for arts and mass media industry professionals, 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 and Master's and Ph.D. programs, as well as short-term scientific training opportunities.

Pakistan. In June 2016, the U.S.-Pakistan Knowledge Corridor was established to support the development of high-level human capital envisioned in Pakistan's policy document Vision 2025. The aim is to support Pakistan's efforts to strengthen its university system by jointly increasing the number of Pakistani faculty who obtain a Ph.D. from U.S. universities. The plan is to send 10,000 Pakistani scholars to U.S. universities in the next 10 years. This is an effort of the government of Pakistan to train its faculty in priority subject areas. In the effort's first phase, 1,500 scholarships will be supported through the Public Sector Development Program. There are 235 U.S. universities on the approved scholarship list for this program. The scholarship covers living expenses and return airfare but not tuition fees.

Uzbekistan. The Islam Karimov Foundation, established in 2016 in honor of the late president, organizes a competition to select gifted young people to study in American and European Master's programs. The foundation's grant is open for the following fields of study: natural sciences (renewable energy and chemistry), water and land resource 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 and painting. The fund covers full tuition and living costs in foreign countries for up to two years. Uzbekistani 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. American Councils for International Education reopened its Uzbekistan office in August 2018, after being closed since 2006. It was the first nongovernmental organization (NGO) to receive accreditation in the past 15 years in Uzbekistan. Such partnerships can lead to greater institutional collaboration, teacher and faculty development, and research.

Regional Economics and Market Demands

Most students in the SCA region gravitate toward the STEM fields when looking for programs of study. Science, technology, engineering, mathematics, business, and computer sciences are all popular fields. In India and Pakistan, English language proficiency is strong and quality undergraduate programs exist. As a result, students focus on graduate degrees that will enhance career opportunities. Program quality, research opportunities, and competitiveness are all factors students consider when selecting institutions to which to apply.

India has been on a steady growth trajectory and is among the world's fastest growing economies. With the rise of the middle class and an increase in consumption, several sectors are seeing continuous growth. Service and technology are two of the fastest growing employment sectors in India. Specifically, within those sectors, some of the leading areas experiencing employment growth include finance (banking and insurance), information technology (robotics, cybersecurity, data science, machine learning, and blockchain), manufacturing, e-commerce, media, and entertainment. U.S. universities offer cutting-edge programs and courses, with specializations catering to the current and future needs of these industries in India. U.S. HEIs provide needed expertise and training not just to new entrants to the job market but also to mid-career and experienced

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

Regarding holidays, note that the Muslim calendar is lunar-based, and dates vary from year to year. Please check U.S. embassy websites and consult 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, but please note the 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 to recruit both undergraduate and graduate students is from April to December. To recruit graduate students, visit between mid-January and mid-March. States adhere to local holidays in addition to national holidays. Check the U.S. Embassy New Delhi's list of holidays for dates of regional holidays.

Kazakhstan. The best times to visit are October to December and March 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 exam times and school holidays, from May to August.

Maldives. The best times to visit are February to April and June 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, which is predominantly in October (but the time may vary each year).

Pakistan. The best time to visit is September to February. Avoid Ramadan, Eid, exams, and school holidays, which occur between May and 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 best times to visit are September to October and April to May. Students are out of school in March, from June to August (for summer break), and in December.

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.

professionals. With a rise in start-ups and entrepreneurial culture in India; aspiring enterprisers are choosing integrated programs in tech and entrepreneurship.

Economic and workforce needs in Central Asia, such as English language proficiency, differ from those of the subcontinent, where English is widely spoken. Central Asian countries are establishing programs to ensure teachers and students have the skills needed to enter the global market, including English language proficiency. Key areas of interest are oil and gas, STEM, agriculture, education, and healthcare. In Nepal, support and expertise are needed in infrastructure building and management in both the private and public sectors, tourism and hospitality, and information and communication technology. This need includes development of roads, transmission lines, airports, hydropower, hospitals, and real estate construction.

China's Belt and Road Initiative and associated infrastructure projects will expand China's economic influence in the region and drive interest among students from SCA in exploring academic opportunities in China.

Many countries in SCA have struggled with weakening economies and currency devaluation. For example, the Kazakhstan tenge has lost nearly half its value against the dollar since 2014, resulting in increased education expenses for Kazakhstani students studying in the United States. Similar economic trends are playing out in Pakistan. As a result, students from struggling economies are exploring study abroad options in countries with lower tuition or generous scholarship opportunities. While students and parents value the quality of a U.S. education, they are looking for opportunities that meet their educational needs at an affordable cost. Students from Central Asian countries have shown a growing interest in community colleges as they look for more affordable options to study in the United States. This is evident in the AY 2018-2019 percentage of students studying at these types of institutions: 26.55 percent in Kyrgyzstan, 30 percent in Turkmenistan, and 11.9 percent in Uzbekistan.

Regional EducationUSA Events

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

Fairs and Conferences

In addition to attending the many in-person student recruitment opportunities offered through participation in EducationUSA fairs and conferences, representatives of U.S. institutions often receive country briefings from EducationUSA advisers, meet with U.S. embassy Public Affairs and Consular Affairs staff (subject to scheduling availability), make presentations at EducationUSA advising centers, and visit local high schools or colleges. 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.

Central Asia. The Central Asia fair tour (through Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan) scheduled for October 2020 will not take place in-person as planned. For updates, visit the “Find an Event” page at <https://educationusa.state.gov>.

India. The India fair tour scheduled for August-September 2020 will not take place in-person as planned. EducationUSA India also hosts Chalo America, small group tours in the spring, across different cities. Alumni fairs are also typically held in December and January. EducationUSA India partners with Yocket to host separate graduate virtual fairs in the fall. For updates, visit the “Find an Event” page at <https://educationusa.state.gov>.

Kazakhstan and Uzbekistan.

EducationUSA centers participate in fall international student fairs, the Begin Group spring and fall international education fairs, and the winter Globus Education Fair. The Bolashak scholarship program holds an annual international education fair in the fall that includes six cities across Kazakhstan (www.bolashak.gov.kz/en/).

South Asia. The South Asia fair tour (through Bangladesh, Nepal, Pakistan, and Sri Lanka) scheduled for September-October, 2020 will not take place as planned. Please check the “Events” section of the EducationUSA website for updated information.

Turkmenistan. In November, the government sponsors an annual international exhibition and scientific conference titled “Education, Sport, and Tourism in the Era of Power and Happiness” in Ashgabat. The EducationUSA advising center in Ashgabat reaches thousands of high school and university students, parents, teachers, professors, and various organizations at this event.

Uzbekistan. Twice a year, the Expocontact Ltd. Company, under the Chamber of Commerce and Industry of the Republic of Uzbekistan, organizes an 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 usually occurs 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

Learning a new language is a common reason U.S. students 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.

SCA overall saw a decrease of 13.4 percent in U.S. study abroad students in AY 2017-2018, compared to the previous year, with 4,919 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 3,900 American students in AY 2017-2018,

followed by Nepal, with 566 students. In AY 2017-2018, Bangladesh, Bhutan, and Kyrgyzstan saw an increase in the number of American study abroad students.

Kazakhstan introduced Go Nomads, a volunteer program for U.S. citizens to spend one to six months teaching English at local universities and colleges in Kazakhstan. The program supports the country’s initiative to enhance trilingual capacity and increase the number of English language speakers (<https://go-nomads.com/en/>).

In 2019, the U.S. Embassy in Nepal received a Study Abroad Engagement Grant 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. These projects, including a weeklong Higher Education Administrator Workshop in Nepal, offer opportunities to emphasize the importance of higher education and capacity building, and further solidify Nepali-American relations.

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

154

EducationUSA Advising Centers in the Region

81 Comprehensive
54 Standard
19 Reference



The Western Hemisphere (WHA) has 154 EducationUSA centers:

- 21 comprehensive, 12 standard, and two reference centers in the Andean sub-region
- 31 comprehensive, 12 standard, and 12 reference centers in the North America, Central America, and Caribbean sub-region
- 29 comprehensive, 30 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 nonprofit organizations. Ten new centers opened within the past year in the Bahamas (Nassau), Brazil (Foz do Iguacu, Caxias do Sul, Juiz de Fora, and São Paulo at Mackenzie Presbyterian University), Mexico (Hermosillo), Panama (Panama City), Paraguay (Ciudad del Este), and Venezuela (Caracas and Lecheria). The region has 162 advisers, 49 percent of whom are based at BNCs.

EducationUSA advising centers in the region offer at least one annual pre-departure orientation, which is open to the public, either in-person or virtually. Advisers collaborate with Consular officers, U.S. higher education admissions offices, and international student services officers, as well as alumni, during these orientations to offer comprehensive information to 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 the Caribbean, Central America, Mexico, and South America, and attract massive crowds of qualified students interested in studying in undergraduate, graduate, intensive English language, and short-term programs in the United States. There are also specialized fairs and country-specific tours throughout the region. 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 also organize and support U.S. embassy- and consulate-organized alumni fairs, at which U.S. government officials share their experiences as college or university students with the public and distribute information about their alma maters.

EducationUSA advisers participate in local as well as commercial fairs organized by private organizations to promote exchange opportunities in the United States. EducationUSA advisers at these fairs host information sessions and interact with the public in 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 audiences in remote locations such as the Amazon, and the Canadian Arctic, the Galapagos Islands, and Patagonia, 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. 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 exchange programs to support activities such as alumni fairs, cohort advising, and outreach. EducationUSA advisers throughout the WHA region engage with U.S. students, volunteers, and professionals to promote the United States as a higher education destination. For example, Fulbright English Teaching Assistants (ETAs), Peace Corps Volunteers (PCVs), Gilman Scholars, and other U.S. students studying abroad at local universities collaborate with EducationUSA on various activities, including delivering writing workshops, tutoring students in English, and 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 institutions in the WHA region. 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 that are 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, 152 students from across the WHA region were enrolled in the program.

Regional Overview

Canada, the Caribbean, and Latin America 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, Brazil, Mexico, Colombia, and Venezuela) and 107,084 students in the United States

during academic year (AY) 2018-2019, the WHA region is second only to Asia in international student mobility to the United States. The region has steady growth in the numbers of undergraduate and graduate students and represents 9.8 percent of total international students in the United States.

Despite 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) remain sources of wealth for the majority of WHA countries. As a result, the Americas still allocate substantial resources to expand science, technology, and innovation and to develop a strong, capable workforce to continue growing local and regional economies. Advisers report that WHA students' top choices in 2019 for academic programs in the United States were

Western Hemisphere



business and entrepreneurship; science, technology, engineering, and mathematics (STEM); 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, Dutch, French, Portuguese, and Spanish models, in combination with regionally developed credentialing models aimed at achieving standardization in the sub-regions. Academic calendars vary across the region, and some 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 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, more than 70 percent of people in WHA have internet access, internet usage ranges from 33 percent in Haiti to more than 94 percent in Canada.

Flight options in WHA can be limited. There are few regional hubs to facilitate direct travel between countries. In Central America and the Caribbean, flights typically connect through Miami, Panama,

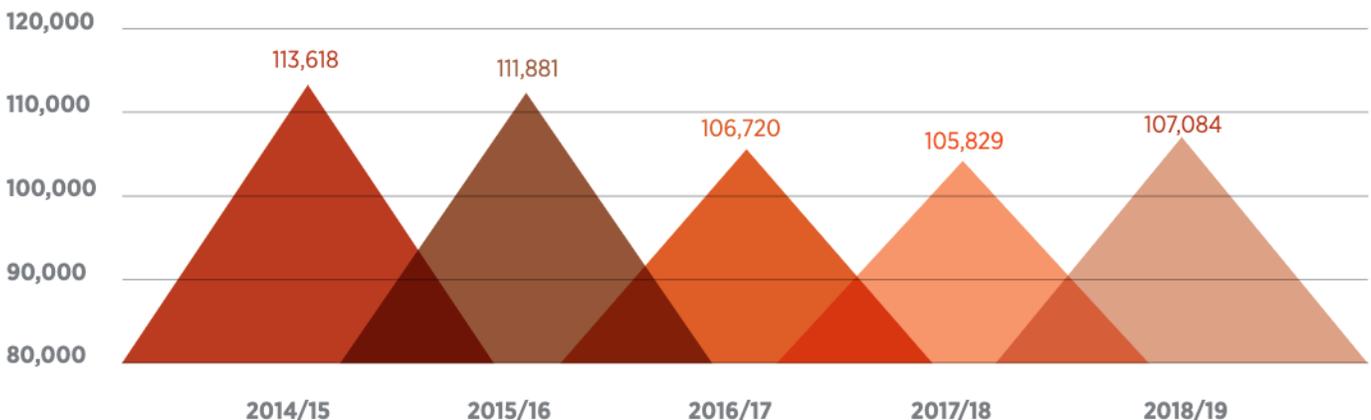
and San Salvador. In South America, Bogota, Buenos Aires, Lima, Rio de Janeiro, Santiago, and Sao Paulo are the major hubs.

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 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 questions from students related to safety and security on U.S.

Student Mobility in the Region (Five-Year Trend)



campuses, obtaining student visas, and being 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 amplify #YouAreWelcomeHere messaging from HEIs across the country as evidence of campus communities and state and local governments welcoming international students. Such messages have been helpful in reassuring students and their parents that U.S. campuses are truly dedicated to welcoming international students and are interested in their success and well-being.

Local political and economic conditions in WHA continue to drive mobility to the United States. Economic recessions force young professionals to delay graduate studies or seek more affordable options, while local security concerns drive parents to consider sending their children abroad for undergraduate studies. Despite the cost of a U.S. higher education, many families in the region recognize its value and are willing to invest in it, resulting in increases in student 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. As a result of Mexico and Canada's proximity to the United States, student interest is concentrated in states near the borders of those countries. An increasing number of international students appear to express a preference for 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. 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. They also seek to build partnerships with U.S. institutions to improve the quality of their academic programs and attract more students. These institutions are offering dual degrees, increasing transfer options for students, and facilitating

faculty exchanges. The Caribbean is the sub-region with the highest growth in graduate student enrollment. The United States remains the top study destination for students from the Caribbean.

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, resulting in a focus on partnerships between nontraditional institutions (such as technical universities) and U.S. community colleges. Such partnerships are 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 pedagogical skills as well as supporting capacity-building efforts across the region. Many local governments are funding short-term English language programs for students and teachers, and these programs are now more readily available in non-English-speaking WHA countries

The 100,000 Strong in the Americas Innovation Fund is the U.S. Department of State's signature hemisphere-wide education initiative to champion the power of education and provide opportunity between the United States and the rest of the Western Hemisphere. The Innovation Fund is a public-private sector collaboration among the Bureau of Western Hemisphere Affairs at the U.S. Department of State, U.S. embassies, nongovernmental organizations (NGOs), private companies, regional governments, and HEIs working to strengthen regional education cooperation.

The Innovation Fund is a central mechanism that helps to create new institutional partnerships, build capacity, increase training opportunities, and provide access to new models of short-term academic exchange programs. As of March 2020, the Innovation Fund had awarded 232 grants to 477 teams of HEIs in 25 countries and 49 U.S. states. Currently, 2,300 education institutions have joined the Innovation

Network, which includes more than 1,200 universities and colleges in the United States.

EducationUSA centers in Latin America support 100K Innovation Fund grant opportunities and partnerships designed to increase student training opportunities to and from the United States. Learn more and join the Innovation Fund network at www.100kStrongAmericas.org.

In a new initiative in Brazil, some high schools offer dual Brazilian-U.S. high school diplomas. Several universities and companies (such as Texas Tech University, University of Missouri, Griggs International Academy, and, more recently, Pearson Academy, with its U.S. homeschooling platform) have partnered with high schools in Brazil to offer required courses in English, leading to a U.S. high school diploma. ACT is reaching 15,000 10th-through 12th-grade students with its Global Assessment Certificate pathway program. Such programs have created a new pool of students for U.S. HEIs to engage by significantly increasing the number of prospective students interested in applying to undergraduate programs in the United States.

Central American countries continue to report steady northbound mobility, with a high percentage of students enrolling specifically in two-year institutions. Honduras leads this sub-region in the 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. The United States continues to be the leading higher education destination for Brazilians. Brazil ranks ninth in the world in sending students to the United States, according to the latest *Open Doors* statistics. There are 40 EducationUSA offices in Brazil, with 47 EducationUSA advisers who cover a country similar in size to the United States.

Brazilian advisers continuously hold webinars and Facebook Live events

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to promote U.S. higher education, providing accurate information about study opportunities in the United States. Due to the enormous size of Brazil, EducationUSA advisers frequently use virtual advising tools and online resources to reach more students. 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. Additionally, EducationUSA collaboration with the Lemann Foundation, one of the largest NGOs in Brazil, has contributed to racial equity and social inclusion initiatives on the national level through the Opportunity Funds program.

It is predicted that Brazil will experience a 2.2 percent economic growth in 2020. President Jair Bolsonaro's administration is seeking partnerships with the United States at all levels. Some U.S. HEIs that were in the process of signing specific STEM agreements with officials from the outgoing administration have been able to finalize these agreements under President Bolsonaro's administration.

Another trend in Brazil is the implementation of programs that provide U.S. high school diplomas at private, bilingual K-12 high schools. This initiative is a response to families' expectations that their children be academically prepared to succeed in a globalized society. It also makes local schools more competitive internationally. The majority of Brazilian students who receive these

diplomas plan to pursue a college degree in the United States, and EducationUSA advisers have been conducting targeted outreach visits to these schools with U.S. HEIs representatives.

EducationUSA offers an annual road show college fair circuit—ending in the host city of the large Brazilian Association for International Education (FAUBAI) conference—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 have 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.

Colombia. STEM areas continue to be of interest for students and a priority area for the Colombian government. EducationUSA Colombia hosts an annual tour in four cities, with a focus on recruiting for U.S. STEM-focused programs. In December 2019, the Colombian government converted the administrative department in charge of science and technology policy (COLCIENCIAS) to MinCiencias, the country's first Ministry of Science, Technology, and Innovation. This new ministry reflects the Colombian government's priority to support STEM activities and promote scientific research and collaboration.

In February 2020, MinCiencias launched a program to support women and girls from vulnerable communities who plan to study science, technology, engineering, the arts, and mathematics (STEAM) areas: Fondo + Mujer + Ciencia (Fund + Woman + Science). Details are forthcoming regarding the program execution and development, but the hope is that many of these women will pursue STEM-related graduate programs in the United States (https://minciencias.gov.co/sala_de_prensa/nace-fondo-para-promover-la-vinculacion-mujeres-y-ninas-en-ciencias-tecnologias).

The Colombian government also supports many academic activities related to the Orange Economy initiative, which focuses on the creative industries and innovation within the cultural sector (<https://investincolombia.com.co/news/943-what-is-the-orange-economy.html>).

On October 22, 2019, the U.S.-Colombia bilateral relationship reached an important inclusive education milestone. The U.S. and Colombian governments and local partners signed a memorandum of understanding (MOU) to promote academic cooperation and cultural exchange opportunities between Historically Black Colleges and Universities (HBCUs) and Colombian HEIs with significant Afro-Colombian student populations. This MOU also builds on the social inclusion, education diplomacy, and economic prosperity efforts of both governments and civil society through the U.S.-Colombia Action Plan on Racial and Ethnic Equality (CAPREE). This effort is part of the Colombian government's

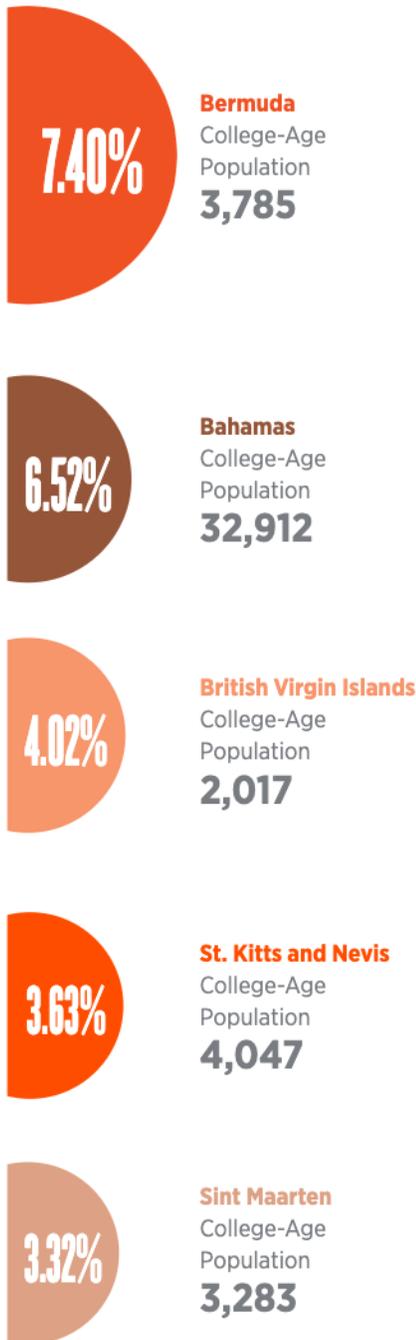
Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students in the Region (Five-Year Trend)

Country	2014/15	2018/19	%Change
Sint Maarten	52	109	109.6%
Cuba	94	163	73.4%
Curaçao	75	122	62.7%
Dominica	166	227	36.7%
Antigua and Barbuda	120	164	36.7%

109.6%

Sint Maarten 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: 2017 Population of the official age for tertiary education, both sexes

strategy to create higher education opportunities for youth and students specifically from Afro-Colombian and indigenous populations (<https://co.usembassy.gov/the-governments-of-colombia-and-the-united-states-promote-cooperation-in-higher-education-to-benefit-african-descendent-populations-in-both-countries/>).

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 Barranquilla, Bucaramanga, and Cartagena are excellent recruitment destinations, because they have high-quality local schools and are economically prosperous. EducationUSA centers in Bogota at COLFUTURO and Fulbright are strategically important, because these two institutions support many Colombian graduate students in the United States.

Dominican Republic. With approximately 50 HEIs, strong government support for international education, and a large youth population, the Dominican Republic offers exciting opportunities for academic mobility. Dominicans have a strong connection to the United States, especially because nearly 2 million people of Dominican descent live in the United States. Dominican HEIs have created innovative, joint 3+1 undergraduate and 1+1 or hybrid graduate degree programs with U.S. universities, including Florida International University, Rochester Institute of Technology (RIT), State University of New York (SUNY) Empire State College, St. John's University, Pennsylvania State University, and Creighton University, to name a few.

The Dominican government also funds thousands of international scholarships for its citizens to study abroad in countries such as Spain, the United Kingdom, and the United States through its Ministry of Higher Education, Science, and Technology. The government funds graduate degree programs in basic sciences, technology, health, engineering, education, and agri-food sciences. Since 2008, the Dominican government has also provided support to the U.S. government's Fulbright Program, providing USD\$600,000 dollars annually

to add 10 slots for Dominicans to pursue graduate degree programs at U.S. universities in priority fields for the country.

The U.S. Embassy in Santo Domingo supports increased student mobility through initiatives that highlight the visibility of U.S. higher education, including the Florida-Dominican Republic Higher Education Summit. The November 2019 summit brought together 150 Dominican and Florida-based higher education representatives to discuss partnership opportunities for student and faculty mobility and joint research. Thirty representatives from 11 Florida HEIs and 120 representatives from 20 Dominican HEIs attended the summit. A similar event, the Northeast U.S.-Dominican Republic Higher Education Summit, is scheduled to take place in the Dominican Republic in November 2020.

EducationUSA has two advising centers in the Dominican Republic that are located in the two largest cities: the capital city of Santo Domingo and the second largest city in the northern part of the country, Santiago de los Caballeros. In close collaboration with the U.S. embassy, the EducationUSA adviser advances U.S. public diplomacy goals by promoting U.S. higher education and guiding students through the U.S. admissions process.

What to Expect Over the Next Three to Five Years

North and Central America and the Caribbean

- Many transitions in government have recently taken place in the region. These transitions will likely lead to

Regional Student Totals Top Five Countries of Origin

Country	2018/19	% Change
Canada	26,122	0.8%
Brazil	16,059	9.8%
Mexico	15,229	-1.5%
Colombia	8,060	1.1%
Venezuela	7,760	-7.3%

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revised educational policies, which will entail more in-country training and professional development opportunities, as opposed to support for education abroad. Therefore, the majority of students and professionals from the sub-region studying abroad will do so with financial support from competing foreign governments that establish partnerships for student academic mobility, training, and professional development. While the U.S. remains the top choice as a study destination, barriers (such as the cost of visas, tuition, and living expenses, as well as the complicated application process) limit the number of students studying in the United States. Many students choose to study in countries that have easier and less expensive application processes and that provide the possibility of working during their studies and/or immediately after they complete their studies.

- As workforce development continues to be a priority for Mexico, as well as most Central American and certain Caribbean countries, interest in short-term certificate programs and partnerships between local technical universities and U.S. community colleges continues to grow. The objective of these programs is to provide vocational education to workers in emerging industries (such as renewable energy, tourism, oil, gas, and mining) as well as traditional economic sectors (such as agriculture, manufacturing, and services). Additionally, non-English-speaking countries have an increasing demand for training in English for specific purposes.
- 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, efforts to develop a workforce that meets the demands of multinational companies based there are creating new opportunities for collaboration among nongovernmental organizations, the private sector, and academia in support of nontraditional 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, and that priority focuses on support for public-private partnerships that facilitate higher education and workforce development in the United States and the Caribbean. *Caribbean 2020* also focuses 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 Region

- The last quarter of 2019 saw political transitions and civil unrest in four of the five Andean region countries. Political instability is expected for at least the next two years as several countries hold elections and/or face controversial economic and social reforms. Despite transitions in the region, most governments continue to prioritize the education sector and support the efforts of local institutions to internationalize and promote student mobility. The economy in the region will likely stabilize in the next three to five years. Students will look for affordable options to study abroad. Financial aid opportunities from other countries will impact students' willingness to choose the United States as a study destination.
- Bolivia is currently at the end of an economic expansion period and is soon predicted to enter a period

of contraction. The severity of this contraction is yet to be determined, but it will likely affect many families, hindering their ability to send their children abroad to study. Nonetheless, during such periods, young professionals will seek to distinguish themselves, and there will likely be an increased interest in obtaining a foreign education. Advisers have noticed growing student interest in pursuing graduate programs abroad.

- While the U.S. continues to be the desired destination for Colombian students looking to study abroad, mounting competition from other countries, especially those that offer affordable study options and a simple visa process, could be a factor in the coming years. The Colombian peso continues to be devalued, so Colombians will continue to look for opportunities for scholarships and lower tuition offers from U.S. institutions. The Colombian government will continue to focus on education, specifically in STEM-related fields, and the development of research and innovation, which may in turn lead to additional programs and funding dedicated to academic mobility and international research collaboration. Student protests related to government funding levels for public universities continue to have a significant impact on the higher education landscape in Colombia and will likely continue to do so. As a result, many public universities are postponing or canceling semesters, which is important to take into account for recruitment visits to Colombia. This may delay the issuance of transcripts and related educational documents. Please contact the Regional Educational Advising Coordinator (REAC) for more information.
- Ecuador's economic recession is intensifying and will likely impact the country for several years. While Ecuadorian students are interested in studying abroad, they look for affordable opportunities to do so. The government is focusing its initiatives on improving primary and secondary education. The U.S. embassy in Ecuador recently signed an agreement with the Ministry of Education to offer training to English teachers to improve students' English proficiency levels. This initiative will increase the number

of students who will be able to study abroad in English-speaking countries.

- While Peru's upcoming presidential election will likely create political and economic uncertainty over the next year, Peruvians will continue to look for opportunities to study abroad. Current government actions to improve local education opportunities are yielding a better-prepared generation of students to study in the United States; they have a stronger academic foundation and better English skills. These initiatives include the English language program Inglés, Puertas al Mundo (English, Doors to the World), which is focused on improving the quality of English teaching and increasing the number of hours that students receive English instruction. Colegios de Alto Rendimiento (COAR) is another popular program that funds the country's most promising students, regardless of socioeconomic background, so they can attend elite, public boarding schools offering the International Baccalaureate curriculum. At the university level, the government is implementing a reform to evaluate and grant licenses to local universities. So far, 89 universities have been granted licenses, and the 43 that have been denied licenses will have to close their doors. This initiative will improve the quality of higher education in the country and therefore improve the academic level of potential graduate students. The latest *Open Doors* report showed a 5.4 percent increase in Peruvians studying in the United States, the largest increase in the Andean region, making Peru a prime recruitment market for international students.

- Though Venezuelans continue to prioritize the U.S. as a study destination, the humanitarian crisis in this country has changed the patterns of student mobility, with Venezuelan students gravitating to more affordable and accessible neighboring countries for study. The closure of the U.S. embassy in Caracas has also made it more difficult for Venezuelans to apply for student visas, though they can still receive visas from U.S. embassies in neighboring countries. This pattern in student mobility will likely persist in the near future. Venezuelans currently living outside of Venezuela

will continue to seek opportunities to study in the U.S., despite facing hurdles such as visa applications and difficulty accessing transcripts. EducationUSA advocates for and supports these displaced students. The worsening of Venezuela's political and economic environment also expedites 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. In 2018, the U.S. embassy in Caracas joined forces with the American Council on Education, SUNY's Collaborative Online International Learning (COIL) Center, and local Venezuelan universities to develop two pilot COIL virtual programs to support Venezuelan universities and strengthen network learning globally. The programs aim to strengthen relations between students and faculty, offer online strategies for faculty, and improve English language learning. This type of virtual international

exchange will remain a popular method for engaging with Venezuela into the foreseeable future.

South America: Southern Cone

- The new government in Brazil is in the process of establishing its educational policies and priorities. Since the new Minister of Science, Technology, Innovation, and Communications is a former astronaut, STEM will undoubtedly remain an important focus of the Brazilian government. Because new middle and secondary education reform includes English as the only mandatory foreign language, there will be more demand for English courses. University students in Brazil are looking for an international experience, even though their universities may not have agreements with U.S. HEIs for credit. Short-term and non-degree courses that allow students to spend a summer or one semester abroad are popular options. Undergraduate recruitment is also in demand, because dual high

U.S. Study Abroad

Top Five Receiving Countries in the Region

Destination	2017/18	% Change
Costa Rica	8,681	4.3%
Mexico	5,963	4.0%
Ecuador	4,055	0.8%
Peru	3,939	6.6%
Argentina	3,805	11.2%

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
Martinique	42	121	188.1%
Colombia	439	905	106.2%
Saint Lucia	56	113	101.8%
Barbados	156	258	65.4%
Cayman Islands	92	148	60.9%

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school diploma options (Brazilian and U.S.) are becoming more common in major cities. EducationUSA has a new tri-border (Argentina, Brazil, Paraguay) office located at one of the largest private HEIs in Foz do Iguacu. It is possible to recruit students from three countries when visiting EducationUSA in this region.

- Argentina is now 22nd in the world and the fourth largest destination in South America in terms of receiving U.S. study abroad students. Partnerships created under the 100,000 Strong in the Americas Innovation Fund and Fulbright initiatives contributed to the 11.2 percent increase in U.S. students studying in Argentina in 2019. That same year, Argentina also reported a 5.4 percent increase in the number of students studying in the U.S. The number of degree-seeking students increased 1.6 percent at the graduate level and a significant 13 percent at the undergraduate level. This result is partially due to the proactive efforts of the EducationUSA advisers in the country. The Alberto Fernandez administration took office in December 2019 and will remain in government until 2023. The Fernandez administration has openly expressed interest in strengthening technical education and STEM careers in Argentina.

- A new university entrance exam will debut in Chile in 2022 and will have two mandatory tests: one for reading skills and the other for mathematical skills. These tests will no longer measure knowledge in traditional subjects, but rather the essential skills to perform well in higher education, with reference to the content and skills of the school curriculum from seventh to 10th grades. Each university will define how to weigh factors (such as a student's grade point average [GPA], class rank, or test results) based on the profile of the student it is looking for and according to the institution's educational model. Students with a GPA within the top 10 percent of their class can apply to university, even if they do not receive the minimum 450-point average required on the two mandatory tests. This change will take effect beginning in 2021 and could benefit more than 6,000 young people who have been excluded from the system. However, this change is seen as a disadvantage by families whose students have typically done well in the current system. As a result, those families may be looking to send their children to study overseas to give them a competitive advantage in the local job market.

- The Ministry of Finance in Paraguay has launched a program targeting students studying English, French, German, and Portuguese. Through the Becas Don Carlos Antonio Lopez

(BECAL) government scholarship, 100 undergraduate students per year will receive funding to support their preparation for graduate studies abroad. Students may renew scholarships for up to two years. More students from Paraguay may apply to graduate programs in the United States through these Paraguayan foreign government graduate scholarships. Additionally, another program launched by BECAL in 2019 helps promote study abroad. That international mobility program is for current undergraduate students who wish to spend a semester abroad. There are two options for this program: The first is to apply directly to one of the world's top 300 universities (per three global rankings) and, if accepted, receive funding from BECAL to cover the semester abroad (up to USD\$10,000 per student). The second option is to apply directly to one of the Paraguay-Kansas Committee partners (including some universities outside of Kansas) and receive a USD\$10,000 BECAL scholarship to study abroad. There are 38 and 50 scholarships per year, respectively, for these options. Only current undergraduate students who have completed 50 percent of their studies can apply.

- The government of Uruguay has incorporated English and technology into the public curriculum at all levels. It focuses heavily on promoting 21st-century tools, such as English language skills, innovation, and technology. In the past 13 years, the government has established the National Agency for Innovation and Research (ANII) and Plan Ceibal, the organization championing Uruguay's national one-laptop-per-child initiative. Seventy-five percent of Uruguayan university students speak English. Uruguayan universities seek to expand their connections to U.S. universities, especially in fields of engineering, technology, education, international relations, and business. Universities are interested in increasing study exchanges, dual-credit courses, and joint degree programs. As of March 1, 2020, Uruguay has a new government that will likely support increasing exchanges and creating more opportunities for Uruguayan students to study in the United States.

Virtual Engagement and Social Media Usage

EducationUSA has at least one Facebook fan page in each WHA country and nearly 300,000 followers, and EducationUSA advisers are expanding their reach through increasingly popular social media platforms such as Instagram, Twitter, and YouTube, and blogs. Advisers use the WhatsApp messaging application to disseminate information about upcoming events and 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 effective methods 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 can begin to plan their studies using the EducationUSA *Your 5 Steps to U.S. Study* model.
- EducationUSA continues to implement webinars and Facebook Live events, highlighting specific parts of the application process. Webinars and podcasts produced by EducationUSA Mexico and posted on YouTube have exponentially increased the views of EducationUSA-produced content.
- EducationUSA Canada continues to rely on technology to reach students. With the First Wednesdays on Facebook Live initiative, launched in spring 2018, EducationUSA Canada regularly provides information on *Your 5 Steps to U.S. Study* to large audiences. EducationUSA offers a virtual essay-writing boot camp 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 replicated 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 select cohort of students. Advisers have created campaigns involving Black History Month, women's empowerment, and U.S. universities that famous Oscar-winning actors have attended.

- EducationUSA in La Paz, Bolivia, now offers virtual advising services for the neighboring city of El Alto. El Alto has a population of approximately 1 million inhabitants, and the demand for services has increased in the past year.
- 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 to help local students view webinars at times when connectivity is more stable, such as in the early afternoon.

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, so the former can 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-path locations. These relationships may yield new connections with students interested in studying in the United States. EducationUSA can help identify these locations.
- Distribute materials in local languages: Dutch, English, French, Portuguese, and Spanish.

- Institutions that have local-language-speaking representatives have proven to be the most successful in recruitment efforts. Parents are more likely to engage the institutions in a meaningful way and follow through in sending their child abroad.

- Highlight anecdotes of institutional support, programs, and services that might be of interest to students from the region, especially those related to culture, history, politics, sports, food, and the arts.
- 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 ask students to share their experiences.
- Send U.S. interns from your institution to EducationUSA advising offices to help advisers with local projects and help promote your institution within that country.

Institutional Partnerships

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. Dual and/or joint degrees and collaborative online education are becoming more popular.

Before you pursue new institutional partnerships, inventory your faculty on existing relationships—formal and informal—with HEIs and their faculty in the WHA region. Identify the types of programs that are or would be relevant and sustainable for both institutions.

Organizing in-person meetings with institutional representatives is often the best approach for developing partnerships.

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Contact the appropriate REAC to develop an initial strategy before traveling. EducationUSA can also share contact information of local institutions. Look for in-country university associations, and participate in their conferences.

For non-English-speaking countries, it is beneficial to have a staff member who speaks the local language to effectively communicate with local institutions. Though staff in international relations offices will speak English, leadership at the institutions will likely not have English fluency.

After a visit to the country, it is important to have regular follow-up with the local institution. Subsequent in-person meetings may be needed to solidify the relationship.

Consider attending the annual NAFSA conference. Several international HEIs from the region attend this conference.

Foreign Government and Private Funding

Argentina. After the G-20 summit in Argentina in 2018, the United States and Argentina signed an Education Framework Memorandum of Understanding to enhance educational exchange programs. In 2019, the Ministry of Education's Department of International Scholarships and International Cooperation (DGCIN) funded more than 130 scholarships to the United States, including 35 Master's degree students and Ph.D. candidates, 17 Argentine teaching assistants, 22 research grants, 10 Friends of Fulbright participants, and 48 teachers and principals for short-term courses. Ten 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, which provides scholarships for Master's programs and research grants in STEM fields. Argentina supported 15 BEC.AR scholarships in 2019. The City of Buenos Aires Magistrates' Council awards four LLM scholarships through Fulbright. The National Scientific and Technical Research Council (CONICET) funds 25 postdoctoral research grants. For research, the National Institute for Agricultural and Technological Research (INTA) awards six grants. The Fernandez administration, which took office in December 2019, is establishing new educational policies and priorities but has already identified technical education and STEM as priorities.

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. Lyford Cay Foundation scholarships are generally worth as much as USD\$15,000 per academic year. In addition, the Ministry of Education has implemented a tiered system to award grants and merit-based scholarships ranging from USD\$7,500 to USD\$35,000 for study abroad.

Barbados. The Barbados Scholarships and Exhibitions are merit-based undergraduate scholarships awarded to approximately 30 students with very high scores on the Caribbean Advanced Proficiency Examinations (CAPE) or in an associate's degree program at the Barbados Community College. The scholarship pays for tuition and airfare, and provides a stipend of about USD\$3,500 per year for study at home or abroad. In addition, the National Development Scholarships provide approximately 10 awards each year in various disciplines to students between the ages of 18 and 40 who have already been accepted to an internationally accredited university at the undergraduate or graduate 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 include STEM, medicine, and law. The scholarship covers all costs. However, due to current political changes in Bolivia, the scholarship program is on hold.

Brazil. The Coordination for the Improvement of Higher Education Personnel (CAPES) Print Program's goal is to increase the academic and social impact of the science produced in Brazil and foster international mobility among Brazilian Ph.D. students and faculty. The program allows Brazilian universities to expand their network of international contacts and partnerships in priority academic fields. The Fulbright Commission in Brazil works with CAPES to expand Fulbright's professional development support for public school teachers. In 2019, Fulbright sent more than

1,000 teachers to U.S. HEIs for one-month teacher training programs.

Canada. The Killam Fellowships Program, administered by Fulbright Canada, 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 academic year). For more information, visit fulbright.ca. The Mitacs Globalink Research Award provides USD\$6,000 for seniors in undergraduate programs as well as for graduate students and postdoctoral fellows in Canada, to conduct 12- to 24-week research projects at universities overseas (<https://www.mitacs.ca/en/programs/globalink/globalink-research-award>).

Chile. After 52 years of operation, the National Commission for Scientific and Technological Research (CONICYT) became the National Agency for Research and Development (ANID). ANID is an administrative agency that oversees programs that promote, encourage, and develop research in all disciplines, technological development, and scientific-technological innovation. ANID focuses on five strategic areas: the formation of advanced human capital, associative research, individual research, visibility of knowledge and generation of strategic networks, and applied research. The mission of the advanced human capital branch is to bolster the advancement of science and technology in the country by funding scholarships for promising graduate and postgraduate students pursuing overseas study. Examples include graduate scholarships in Chile for Master's and Ph.D. programs (scholarships for education professionals and public officials are also included) and graduate scholarships for Master's, Ph.D., and postdoctoral study abroad. The Tuition-Free Program (Gratuidad) provides low-income students financing for tuition and fees for the duration of their studies. In 2019, 376,433 students were awarded Tuition-Free scholarships, an increase of 14.9 percent compared to 2018. Of the undergraduate students at Chilean institutions, 57.2 percent receive this benefit.

Colombia. COLFUTURO (<http://colfuturo.org>), a nonprofit foundation established in 1991 with the support

of the government of Colombia and the private sector, provides loan-scholarships for Colombians to pursue graduate study abroad. These financial aid mechanisms involve granting a student loan that can turn into a partial scholarship if the student complies with certain policies such as working for the public sector upon returning to Colombia. The United States is the overall number one destination country for COLFUTURO beneficiaries, and one of the 11 EducationUSA centers in Colombia is located in COLFUTURO. ICETEX, the Colombian government entity that promotes higher education through national and international educational credits, offers loans for students to pursue graduate study abroad (<http://www.icetex.gov.co>).

Costa Rica. The Costa Rican USA Foundation for Cooperation (CRUSA), in collaboration with the World Bank and local HEIs, supports international exchange and student mobility initiatives in STEM fields, using tools that include the Opportunity Funds program. Through its partnership with the BNC Centro Cultural Costarricense Norteamericano and its EducationUSA center, 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-becatecnicos/>).

Dominica. The Dominica government awards one Island Scholarship each year to the student with the highest score on CAPE. In addition, the Dominica government awards approximately five scholarships annually to the top student in each of the five faculties of Dominica State College.

The Dominican Republic. The Ministry of Higher Education, Science and Technology (MESCYT) continues to support study abroad at the graduate level, with 7 percent of all applicants choosing the United States as their study destination. MESCYT prioritizes Master's and Doctoral 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 (SENESCYT) currently offers few scholarships for study abroad. There is no information about upcoming calls for the graduate-level scholarship program. Fundación Capacitar is an NGO that offers a combination of grants and loans to cover the living expenses of current and future Ecuadorian university professors pursuing graduate degrees abroad. Financial support from Capacitar can be used for graduate studies, and the amount provided varies, depending on the applicant's financial situation (<http://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 a 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 2019, approximately 197 Honduran students received awards to cover airfare, lodging and maintenance, tuition and fees, medical insurance, and materials. Priority fields of study for this program are tourism, housing, textiles, agriculture, manufacturing, and business support services. HONDUFUTURO offers the same model of support as GuateFuturo (described under the Guatemala entry), with loans of up to USD\$50,000. Students may be awarded scholarships for 50 percent of the loan amount, provided they meet three requirements: 1) be awarded a 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 immediately engage in employment for one full 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.

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Mexico. The U.S. embassy in Mexico, with support from local higher education associations and in partnership with HEIs, offers a series of short-term programs focused on women and minority empowerment as well as research. In addition to managing traditional Fulbright exchanges, the Fulbright Commission in Mexico (COMEXUS) supports non-Fulbright innovative, short-term programs in undergraduate research, teacher training, and professional internships, both in Mexico and the United States. The government of Mexico sends graduate students mainly via the Fulbright Commission and the National Council of Science and Technology.

Panama. The Panamanian government continues to prioritize the strengthening and development of local education, focusing mainly on two areas: English and STEM. With the goal of increasing the quality of English instruction in public high schools through teacher training, programs such as Panama Bilingue will continue to provide short-term study scholarships (<https://www.meduca.gob.pa>). The National Secretariat for Science Technology and Innovation (SENACYT) administers several scholarship programs, including the Fulbright-SENACYT scholarship, at the undergraduate and graduate levels in a range of fields. The Secretariat recently announced an expansion of support and eligible programs, including doctoral candidates and internships (<https://www.senacyt.gob.pa>). The Institute for Training and Development of Human Resources (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 (www.ifarhu.gob.pa).

Paraguay. In 2015, the Paraguayan government launched its first scholarship program, BECAL (www.becal.gov.py). This program funds approximately 120 scholarships each year for Master's and Doctoral students in education and STEM fields. Students must be accepted at one of the top 300 world universities or top 100 higher education programs, according to three university rankings. In addition to providing government scholarships, the U.S. Embassy in Paraguay administers

the Fulbright Program. This is the third year that EducationUSA has co-organized BecasPy, a mentorship program for Fulbright and Fulbright-Cal, with support from BECAL. This program has been held annually in three different cities to attract students from outside the capital.

Peru. PRONABEC (which stands for Programa Nacional de Becas, or National Scholarship Program in English) is Peru's government agency for scholarship programs and manages Beca Presidente de la República. The scholarship supports Master's and Doctoral studies in STEM, public policy, and education (<https://www.pronabec.gob.pe/beca-presidente/>). The call for applications began in May 2020 for programs beginning in Fall 2020 and ending in Fall 2021. Programa Crédito-Beca Reto Excelencia-SERVIR (www.retoexcelencia.gob.pe/) is a loan-scholarship program that helps public servants pursue graduate studies abroad. To date, more than 220 government employees have benefited from this opportunity. The government has confirmed the program will be available in 2020, but it has not yet shared an official launch date for the call for applications.

Uruguay. The government of Uruguay identifies or nominates candidates for U.S. embassy exchange programs, and, in recent years, it has become a strong contributor to Fulbright academic programs. Every year, ANII funds Fulbright scholarships for study at U.S. institutions to earn Master's or Doctoral degrees in subjects such as biotechnology, environmental sciences, information and communications technology, human and animal health, energy, education, creative industries, agribusiness and agro-industry, transportation, and criminology (<http://www.fulbright.org.uy/becas-para-uruguayos/%20beca-de-posgrado/>). Of all ANII funds, 40 percent are dedicated to supporting students attending U.S. universities.

Organization of American States (OAS). Students from member countries are eligible for Rowe Fund loans (www.oas.org/en/rowefund/). These interest-free loans are available at the graduate level throughout the region and for undergraduate studies in English-speaking Caribbean countries. The Rowe Fund offers EducationUSA Opportunity

Funds students from Argentina, Bolivia, Chile, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, Paraguay, and Uruguay the opportunity to apply for this loan without a cosigner.

Regional Economics and Market Demand

The majority of governments in WHA have identified STEM-related fields as key focus areas for workforce development and economic growth. Governments in the region support both technical and research-related pursuits in STEM fields. Specific strategic sectors include oil, gas, mining, agribusiness, and healthcare. Several countries, such as Colombia, are investing in the "Orange Economy" and considering how culture and creative industries can play a pivotal role in economic development. Entrepreneurship is a regional focus area as countries consider ways to support small business growth. Several countries also rely on service industries (tourism, banking, information) as major employment sectors.

Countries in the region seek opportunities to collaborate on non-degree, tailor-made short-term programs, especially for technical education. Such programs include internships and other hands-on experiences for young professionals, virtual education opportunities, and capacity-building opportunities with local academic institutions as well as the public and private sectors.

Regional EducationUSA Events

Refer to the EducationUSA website and social media accounts of specific countries to find current country-specific information about upcoming fairs, webinars, center events, and other activities. Contact the appropriate REAC for the region you are interested in engaging. Additional opportunities include participation in beginner adviser trainings, thematic sub-regional workshops, and capacity-building workshops for local HEIs.

Fairs and Conferences

Brazil. EducationUSA organizes the Brazil 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, meet key leaders in internationalization, and establish partnerships. In 2019, the Roadshow reached more than 5,178 students. For updates, visit <http://educationusa.org.br/site/the-brazilian->

educationusa-roadshow/ or contact roadshowbrazil@educationusa.org.br.

Caribbean. Aside from traditional, independently organized Caribbean college fairs, EducationUSA organizes fairs in the Bahamas, Barbados, Jamaica, and Trinidad and Tobago. EducationUSA is evaluating the feasibility of offering a virtual fair in place of the in-person Caribbean fair circuit, which had been planned to take place in October 2020.

Colombia and Central America STEM Tour. In March 2020, EducationUSA organized the fourth annual EducationUSA STEM Tour, including four stops in Colombia and stops in Costa Rica and El Salvador. While the Costa Rica stop was canceled, it is planned as an annual event. 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 updates, please contact colombiatour@educationusa.org.

Guatemala and Honduras EducationUSA Tour. In future years, EducationUSA Guatemala and Honduras plan to host business-focused fairs in Antigua, Guatemala City, San Pedro Sula, and Tegucigalpa. The tour will promote undergraduate and graduate programs in business. In addition to coordinating open public events, advisers will organize a series of networking events and school visits, as well as cultural activities to enrich the experience.

High School Counselor Training Workshops. EducationUSA Brazil, Canada, Chile, Colombia, Dominican Republic, Eastern Caribbean islands, Ecuador, Honduras, Mexico, and Trinidad and Tobago

organize training workshops on U.S. higher education for local high school counselors.

LLM Fair. In 2019, EducationUSA's third South America LLM Fair circuited to eight cities in five countries: Rio de Janeiro, Brasilia, Sao Paulo, Curitiba, Buenos Aires, Montevideo, Lima, and Bogota. The event included 50 U.S. HEIs and attracted approximately 1,175 visitors. The fall 2020 LLM fair will not take place in-person as previously planned. However, there will be a general virtual college fair for the Western Hemisphere on September 19, 2020. For updates, please contact llmfair@educationusafair.org.

South America. The 2019 South America EducationUSA fair circuit attracted 84 U.S. colleges and universities, traveled through 12 cities, and had more than 33,000 students in attendance. While the 2020 South America EducationUSA fair circuit will not take place in person as previously planned, there will be a virtual college fair for the Western Hemisphere on September 19, 2020. For updates, please contact southam@educationusafair.org.

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 devised this innovative approach 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 to research and represent U.S. colleges and universities at these fairs, for which U.S. institutions are encouraged to send

materials. Mock fairs reach more than 6,000 students a year.

Alumni Fairs. EducationUSA regularly hosts alumni fairs, in which U.S. embassy and consulate officers represent their alma maters after receiving guidance from their institutions and EducationUSA advisers. U.S. HEIs are encouraged to mail informational materials to the organizers for use in these fairs.

U.S. Study Abroad in the Region

Costa Rica continues to be the region's top receiving country, with 8,681 U.S. students in AY 2017-2018, making it the ninth most popular study abroad destination worldwide for U.S. students. Argentina, Chile, Ecuador, Mexico, and Peru are also leading host destinations in the region, and all are ranked among the top 25. With 14.9 percent of the total U.S. study abroad population in WHA, which is only second to Europe, it is noteworthy that Barbados, Brazil, Curaçao, Guatemala, Guyana, Panama, St. Lucia, and Uruguay are rapidly growing destinations.

Studying abroad continues to be an area of academic mobility that holds immense potential for Colombia. On the ground, advisers are seeing a great increase in interest in U.S. study abroad in Colombia from academic communities in both the U.S. and Colombia. More U.S. institutions are sending students for semester exchanges through third-party providers, and there is an increase in short-term faculty exchanges to Colombia.

The new Bolivian government has lifted the visa requirements for U.S. citizens, which is likely to result in more study abroad opportunities and institutional partnerships promoting student mobility with the United States.

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, depending on the region within the country. Avoid traveling during Christmas, at the beginning of the New Year, and during 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.

In 2019, U.S. embassies and/or Fulbright Commissions in Canada, Colombia, Ecuador, Honduras, and Uruguay received Study Abroad Engagement Grants from the USA Study Abroad Branch at ECA to carry out capacity-building projects to promote American study abroad in the region. EducationUSA centers have collaborated with local universities, embassies, and Fulbright Commissions to support these initiatives.



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