



Global Guide 2015



2015 GLOBAL GUIDE



Your Official Source on U.S. Higher Education
EducationUSA.state.gov



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Introduction to EducationUSA

Mission and Structure: Supported by the U.S. Department of State's Bureau of Educational and Cultural Affairs (ECA), the EducationUSA network consists of advising centers in nearly every country of the world. ECA's mission is to build mutual understanding between the people of the United States and the people of other countries. The EducationUSA network supports this mission by increasing international student mobility. EducationUSA advisers work in U.S. Embassies and Consulates and in partner institutions that include Fulbright Commissions, bi-national cultural centers, U.S. nongovernmental organizations (NGOs), foreign NGOs, and foreign universities and libraries. Advisers help international students and their families navigate the U.S. college admissions process by providing accurate, comprehensive, and current information about the full range of accredited U.S. institutions of higher education.

Regional Educational Advising Coordinators (REACs)

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

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 group advising sessions, virtual advising, individual appointments, pre-departure orientations, and information about the breadth of U.S. higher education. The U.S. higher education community can look to the EducationUSA network for advice about developing regional and country-specific recruitment strategies, creating programs and products to connect with students, and obtaining information about application and admission issues. 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.

Your 5 Steps to U.S. Study

EducationUSA's *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 short-term educational opportunities at U.S. colleges and universities. The steps give students a timeline and practical tips to navigate the process. *Your 5 Steps to U.S. Study* is available online at EducationUSA.state.gov.

U.S. Study Abroad

EducationUSA advisers around the world are experts in understanding national education systems and have good relationships with local universities and schools. If you are considering establishing or expanding study abroad programs, contact an EducationUSA adviser in your target country to discover the information and services they may offer.



5,551+

U.S. Higher Ed Professionals enjoy
login access to EducationUSA

5,600+

Subscribers to the HEI eNews

1,358,755

2014 Website Unique Visitors



Services for U.S. Higher Education Institutions

The U.S. Department of State promotes the United States as the leading higher education destination for students around the world, and maintaining that position is a priority. International students enrich U.S. universities and communities with unique perspectives and experiences that expand the horizons of American students and make U.S. institutions more competitive in the global economy. The knowledge and skills students develop on campus prepare them to become the next generation of world leaders who can work across languages, cultures, and borders to solve shared global challenges.

At the 2013 EducationUSA Forum, Secretary of State John Kerry stated, “The international students who learn in our classrooms enrich our campuses and our country. And when the 765,000 international students who studied in the United States last year return home, the bonds that they have built here and the friendships that they have forged will last a lifetime.”

International students and their families also benefit the U.S. economy: The Economic Benefits of International Education to the United States of America: A Statistical Analysis (NAFSA) articulates these benefits and suggests ways to promote the value of campus internationalization to the academic community.

Research

The U.S. Department of State funds the *Open Doors Report*, 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 are used by U.S. embassies, the 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, as well as on the economic impact of international students to the state where they study and the nation as a whole. Also included in the publication are sections on international scholars in the United States and Intensive English Programs.

The Department of State also funds *Project Atlas*, a publication that tracks migration trends of the millions of students who pursue education outside of their home countries each year. Data are collected on global student mobility patterns, as well as on leading countries involved in international higher education mobility.

Work With EducationUSA Advisers and REACs

- Join U.S. higher education professionals and advisers from key overseas markets at the annual EducationUSA Forum in Washington, D.C.
- Host EducationUSA advisers for visits and training programs on your campus. Ensuring that advisers have access to current information and skills-based

training is essential to the success of the EducationUSA network. The following opportunities are available:

- **EducationUSA Training Institute:** Each two-week EducationUSA Training Institute comprises a Washington, D.C.-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 online at www.EducationUSA.state.gov.
- **Campus Visits/Higher Education Association Conferences:** Experienced advisers represent EducationUSA at a variety of U.S. higher education association conferences each year. During their time in the United States, advisers have the opportunity to arrange visits to colleges and universities close to the conference location.
- Offer to serve as a topic expert at EducationUSA adviser training programs overseas.
- Direct students accepted to study at your institution to EducationUSA pre-departure orientations in their home countries.

Global Recruiting Strategies

- Consult Regional Educational Advising Coordinators (REACs), the first point of

contact for region- and country-specific advice.

- 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 application and college search process to save time and ensure accurate information.
- Demystify the U.S. application and admissions process by directing international students to *Your 5 Steps to U.S. Study* at EducationUSA.state.gov.
- Conduct market research to find regions or countries that fit your school's recruiting priorities. Take advantage of *The Open Doors Report on International Educational Exchange*, the regional information presented in this guide, and the EducationUSA Center and/or Country Fact Sheets available on our website.
- Visit EducationUSA Advising Centers to make a presentation and gain exposure. REACs and advisers can help you get the most out of your international recruiting trips. Contact the center in advance to arrange a meeting or school visit, present a group session, or attend a college fair.

- Encourage your 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 collaboration with the EducationUSA network to promote your institution to students abroad. EducationUSA work with 30 state and regional consortia that promote U.S. cities, states, and regions as destinations for international students.

Virtual Reach

In addition to recruitment resources such as PowerPoint presentations and country reports, EducationUSA offers a variety of services for U.S. higher education. Services include:

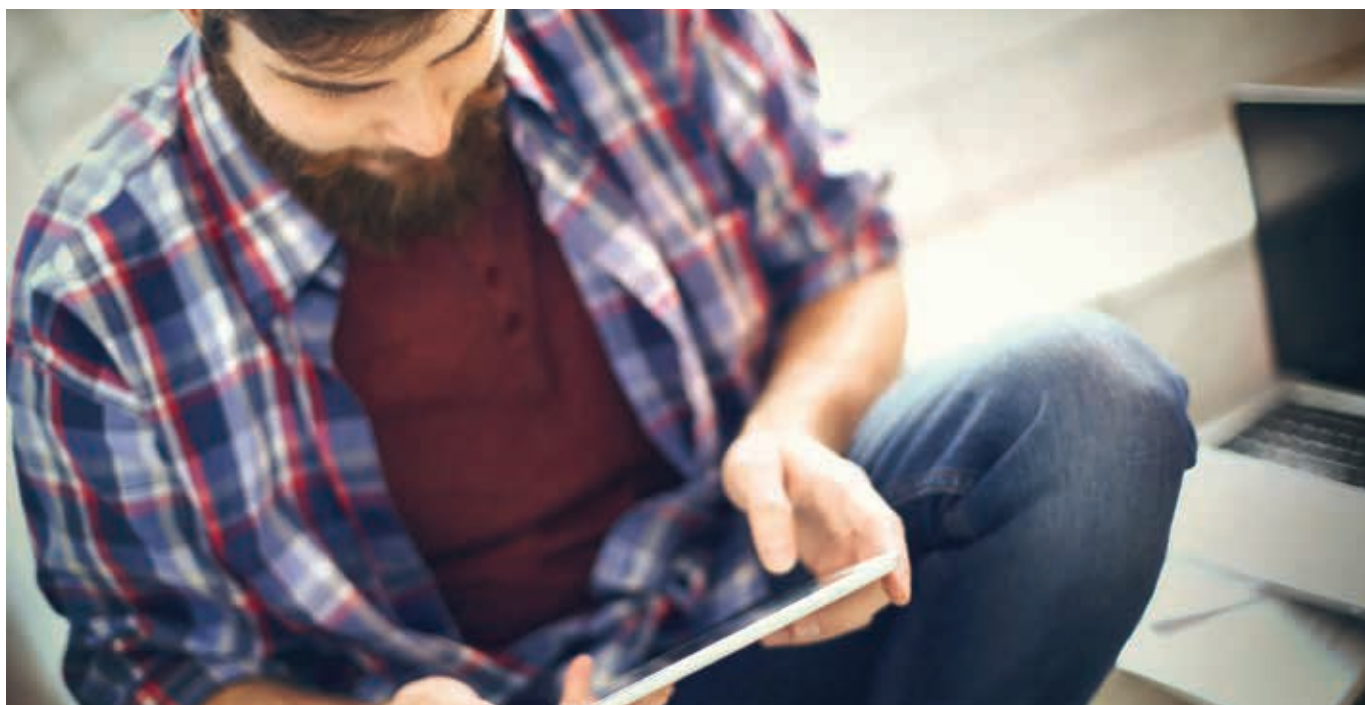
- Access for U.S. higher education professionals to the EducationUSA network of advisers and REACs
- Connecting with Washington D.C. EducationUSA staff and embassy representatives
- Participating in EducationUSA Interactive webinars as presenters

- Subscription to the *Higher Education Institution (HEI) News*

- Structured visits to EducationUSA centers
- Special programming, regional fairs, and events
- Social media platforms to engage potential international students

Login Access

The U.S. higher education section of the EducationUSA website helps institutions develop and refine their international student recruitment strategies. Free logins are available for employees of U.S. postsecondary institutions listed with the Council for Higher Education Accreditation (CHEA) and higher education professional membership associations. A login gives access to further information on the EducationUSA.state.gov website.



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	111,208
Advising by phone or SMS (each conversation)	269,502
Advising by email	606,098
Group advising attendees	183,753
Walk-ins/library/computer users	391,183
U.S. Institution Representatives	10,721
MOOC Camp Attendees	4,012

Total	1,576,477
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Number of Event Attendees, by Outreach Activity

Education fairs	1,062,535
American Corners/Centers	52,925
Local universities/secondary schools	383,249
Other fairs/conferences/seminars	154,285
Host government events	22,560
Embassy/consulate events	26,122
Public locations	256,401

Total	1,958,077
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Number of Virtual/Social Media Contracts, by Type

Social networks - pages likes, and group members	2,651,126
Video/Video channels video views	376,360
Skype Contacts & IM advising calls	15,443
Blog follows	591,214
Twitter/microblog follows	195,724
Digital Video Conferences (DVCs) participants	2,151
EdUSA newrow sessions attendees	6,955
EducationUSA Interactive Sessions	3,170
Virtual fairs - EdUSA booth & session visitors	16,484
Mobile App Users	8,206

Total	3,866,833
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Unique website visitors (Center and flagship websites)

Total Website visitors	5,519,342
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Total	12,920,729
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Regional EducationUSA Advising Coordinator (REAC) Map





EducationUSA Advising Centers

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

Comprehensive

- Maintains up-to-date library of reference books/materials
- Offers individual and group advising, information on financial aid, and pre-departure orientations/information
- Has advising staff with college degrees (U.S. bachelor's degree or equivalent) who are proficient in spoken and written English
- Provides virtual advising and consulting through email, web, social media, instant messenger, etc.
- Maintains computers with internet access for visitors
- Organizes and participates in alumni group activities and college fairs
- Has existing relationships with local high school counselors and university administrators and conducts outreach to local high schools and higher education institutions
- Provides briefings for visiting U.S. representatives on the local education system
- Is able to describe and compare U.S. and host country educational systems
- Is able to verify 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 for visiting U.S. representatives at off-site locations
- Hosts visiting U.S. representatives for promotional presentations
- Organizes general U.S. higher education orientation sessions, often featuring visiting U.S. representatives
- Provides information on local government and foundation scholarships, and other financial aid
- Displays college- and university-provided materials
- Adheres to the EducationUSA Principles of Good Practice

Standard

- Maintains up-to-date library of reference books/materials
- Has at minimum a half-time adviser or sufficient hours to meet local demand at standard service level
- Has advising staff proficient in spoken and written English
- Offers individual advising
- Provides information on financial aid
- Is able to describe and compare U.S. and host country educational systems
- Has existing relationships with local high school counselors and university administrators
- Displays U.S. college- and university-provided materials

- Has access to video conferencing equipment, e.g., internet-based
- Offers pre-departure information/orientations
- Participates in college fairs, hosting the EducationUSA booth
- Provides briefings for visiting U.S. representatives on the local education system
- Is able to verify Ministry of Education recognition/certification of local high schools and universities
- Organizes general U.S. higher education orientation sessions, often featuring visiting U.S. representatives
- Adheres to the EducationUSA Principles of Good Practice

Reference

- Maintains up-to-date library of reference books/materials
- Has no adviser or only minimal assistance is available
- Adheres to the EducationUSA Principles of Good Practice

Social Media

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

U.S. institutions quickly and effectively reach prospective international students through the EducationUSA network's social and virtual media channels.

EducationUSA social media channels and webpages reached 9.4 million people in 2014. In addition to popular, dominant social media networks such as Facebook, Twitter, and YouTube, EducationUSA advising centers embrace country-specific social media platforms to better engage with the students they serve. For example, advisers in Russian-speaking countries reach students on Vkontakte, while advisers in China connect to students on the popular micro-blogging site Sina Weibo. In parts of the world like Belarus, Iran, and Syria, where an in-person advising presence is not feasible, EducationUSA advising centers operate exclusively on virtual platforms.

Trends: EducationUSA expanded its online presence in 2014. In addition to producing the new Study in the USA video, which garnered over 35,000 YouTube views by early 2015, the network launched a new Facebook page to further share topical information with U.S. higher education professionals. The EducationUSA Facebook page for prospective students experienced its own milestone when it reached 200,000 likes in November 2014.

EducationUSA Interactive

EducationUSA, in collaboration with the U.S. Department of State's Bureau

of International Information Programs, launched the new EducationUSA Interactive series in summer 2014. These web chats feature international students, U.S. higher education representatives, and other experts discussing American campus culture, financing U.S. study, and the U.S. visa process. This past year's eight EducationUSA Interactive programs attracted more than 3,000 viewers from around the world who watched and asked questions using the program's popular chat feature.

EducationUSA Virtual Fairs

For the third year, EducationUSA partnered with CollegeWeekLive (CWL) for a virtual international student college fair during International Education Week (International Students' Day). The November 19, 2014 event attracted 21,007 individual attendees. Students from 206 countries and territories interacted with EducationUSA advisers and representatives from 178 U.S. colleges and universities. Interactions with U.S. institutions totaled 68,565 (up 23 percent from 2013).

EducationUSA also partnered with CWL on three additional global International Students' Day fairs, as well as three regional fairs aimed at Asia, Latin America, Europe, the Middle East, and Africa. At each virtual fair, EducationUSA staff presented thematic sessions related to U.S. study. EducationUSA will continue its involvement

in these International Students' Day fairs in the coming year as part of its public-private partnership with CWL.

EducationUSA Website

In March 2015, EducationUSA launched a new website. EducationUSA.state.gov was built with responsive design for a mobile-friendly site. The site has Google Translate embedded, providing automated translation into 90 languages. The site features updated design, functionality, and content. In addition to sections with refreshed content for international students, their parents, and U.S. colleges and universities, there is a new section for foreign governments and foreign institutions of higher education. The integration of Zoomph on the homepage facilitates pulling in user social media posts from Facebook, Instagram, Google+, and Twitter that use the hashtag #EducationUSA to create a more interactive and dynamic site. Additionally, with links to social media on each page, users can share pertinent information about study in the United States with their own social networks. The website also contains a special resource section for U.S. higher education, State Department employees, and EducationUSA advisers. Users can request a login to gain access to key educational market intelligence, including the annual *EducationUSA Global Guide*, 170 country fact sheets, the weekly *Social Media Digest*, and more.



Facebook

Likes: 2,651,126
Pages: 239

**168% increase
from 2013**



Blogs

Views: 591,214
Pages: 38

**36% increase
from 2013**



Twitter

Followers: 420,343
Pages: 91

**115% increase
from 2013**



YouTube

Followers: 376,360
Pages: 53

**378% increase
from 2013**

Sub-Saharan Africa

Regional EducationUSA Profile

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

50

EducationUSA
Advising Centers
in the Region

29 Comprehensive
17 Standard
4 Reference

Sub-Saharan Africa (SSA) EducationUSA advisers are trained to guide undergraduate and graduate students through the U.S. admissions process and collaborate with U.S. colleagues on recruitment, credential evaluation, local educational systems, university linkages and faculty exchange programs, joint research collaborations, and study abroad programs.

In the 45 SSA countries where there are currently EducationUSA advising centers, the majority are located in U.S. Embassies and Consulates. The number of centers continues to grow as EducationUSA partners with U.S. Embassy American Spaces to expand advising services throughout the region to reach talented students outside of the major cities. This year's expansion also includes the exploration of opening an advising center in Somalia.

Sub-Saharan Africa's EducationUSA advisers are known for their close personal relationships with students and their families, as they form long-term bonds during the application process and keep abreast of students' educational experiences in the United States until their eventual return home. Centers integrate returned alumni into advising programs where they serve as the voice of experience. Cohort-advising models, now active and expanding across the region, produce the EducationUSA difference of intensive, focused programs that strengthen the competitiveness of prospective students and broaden their horizons.

For the second consecutive year, the number of Sub-Saharan African students

in the United States has shown a two percent increase. In 2013-2014, there were 31,113 SSA students studying in the United States. Students who used EducationUSA services received more than \$31 million in scholarships and financial aid from U.S. higher education institutions.

Sub-Saharan Regional Overview

Sub-Saharan African students are spread across the 50 U.S. states in more than 1,270 institutions. Texas, New York, Massachusetts, Maryland, and Pennsylvania are favorite destinations, but many students are eager to seek opportunities wherever they can. Fifty-six percent of SSA students are in undergraduate programs. Seventy-three percent of these undergraduate students are in four-year institutions and twenty-seven percent in two-year institutions. Twenty-nine percent of Sub-Saharan African students are enrolled in graduate study and the remaining 15 percent are in non-degree programs and optional practical training (OPT). The number of students enrolled in intensive English study increased 17 percent to 1,583 in 2013-2014.

Several Sub-Saharan African countries with an undergraduate percentage higher than 70 percent include Angola, Burundi, Cabo Verde, Central African Republic, Democratic Republic of the Congo, Equatorial Guinea, Gabon, Somalia, and The Gambia.

Sub-Saharan African countries with a graduate percentage higher than 40 percent are Eritrea, Ghana, Liberia, Mozambique, Sudan, and Uganda. Countries with more than 100 students taking the GRE or GMAT in 2013-





2014 include Nigeria (4,099), Ghana (1,626), Kenya (1,279), South Africa (1,025), Cameroon (498), Ethiopia (408), Zimbabwe (309), Uganda (253), Swaziland (246), Côte d'Ivoire (204), Tanzania (170), Rwanda (197), Sudan (155), Eritrea (136), and Liberia (103).

The Opportunity Funds Program, designed to assist academically talented, financially disadvantaged undergraduate and graduate students with the upfront costs of applying to U.S. institutions, is now in thirteen SSA advising centers: Burkina Faso, Cameroon, Côte d'Ivoire, Ghana, Malawi, Mozambique, Nigeria, South Africa, Swaziland, Togo, Uganda, Zambia and Zimbabwe.

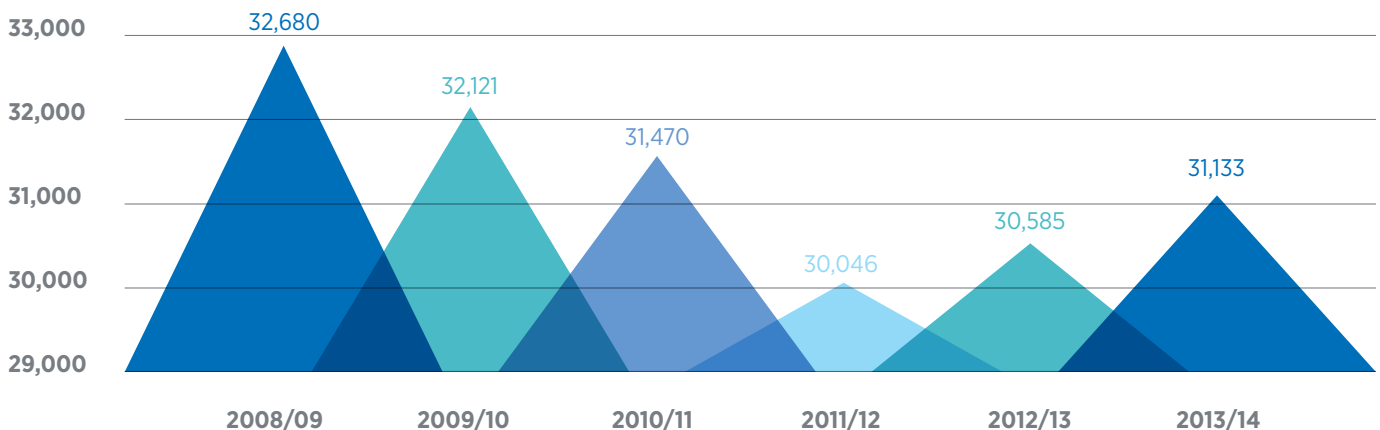
According to the World Bank, Sub-Saharan Africa's economy grew for the second consecutive year, up to 4.5 percent in 2014, compared with 4.2 percent in 2013. Regional GDP growth is projected to remain broadly unchanged at 4.6 percent in 2015 and is projected to increase to 5.1 percent by 2017, with a lift from infrastructure investment, increased agriculture production, and a buoyant services industry.

The UNESCO Institute for Statistics cites strong growth in academic mobility and demand among post-secondary students in Sub-Saharan Africa. Africa has been attracting more attention from international recruiters,

due in part to major demographic shifts currently underway across the region. A recent study by Standard Bank, one of the region's top financial institutions, indicates that the African middle class has tripled in size over the past 14 years, growing from 4.6 million households in 2000 to 15 million today in the continent's 11 largest economies. The countries in the Standard Bank study — Angola, Ethiopia, Ghana, Kenya, Mozambique, Nigeria, South Sudan, Sudan, Tanzania, Uganda, and Zambia — account for about half of Sub-Saharan Africa's population and GDP and have seen their economies grow tenfold since 2000. Standard Bank estimates the number of middle-class households

Student Mobility (Five-Year Trend)

Source: Institute of International Education, funded by a grant from the U.S. Department of State, *Open Doors Report on International Educational Exchange*



Sub-Saharan Africa

across these 11 economies will nearly triple again, to 40 million families by 2030. Sub-Saharan Africa is projected to continue to experience explosive population growth. Currently slightly below a billion people, the population is projected to reach more than two billion or 22 percent of the world total by 2050. According to the World Bank, 62 percent of the population of Sub-Saharan Africa — more than 600 million young people — are below the age of 25. By 2080, Sub-Saharan Africa will be the only region in the world with a population that is still growing. All other regions are projected to experience a slowdown in population growth and eventually a shift towards negative growth. As populations, especially of young people, continue to grow, demands for social services, specifically in health and education, continue to rise.

This unprecedented population growth is already impacting enrollments in SSA higher education institutions. Currently, over 4.8 million students are enrolled in higher education institutions in Sub-Saharan Africa. This number represents an increase of twentyfold since 1970 when total enrollment was less than 0.2 million students for the entire Sub-Saharan region (World Bank, 2010). There are signs this trend is putting significant pressure on the education system as the demand for higher education in the region continues to outpace its provision, straining its capacity to deliver services that meet minimal quality standards.

This combination of factors — a booming youth population, economic growth

and trends toward globalization and internalization of higher education — is a catalyst for renewed focus on the importance of higher education and many global and regional initiatives, partnerships, and projects, such as:

- The first African Higher Education Summit, *Revitalizing Higher Education for Africa's Future*, a three-day continental summit held in Dakar, Senegal March 10–12, 2015. The government of Senegal hosted the seminar with TrustAfrica. Other partners included the African Union Commission, Council for the Development of Social Science Research in Africa, UN African Institute for Economic Development and Planning, Association of African Universities, African Development Bank, South Africa's National Research Foundation, Association for the Development of Education in Africa, Carnegie Corporation of New York, MasterCard Foundation, and the World Bank. The event served as a forum for themes including policy harmonization across African universities, sustainable investment models, diversity, graduate employability, gender, governance, the role of research, and the development of a common vision towards transforming Africa's higher education system.
- Fifteen universities from eight African countries launched an alliance of research universities at the African Higher Education Summit. The focus of the group will be to build African research excellence for the continent to develop and exert control over its future. The universities include Lagos, Ibadan and Obafemi Awolowo in Nigeria, the University of Ghana, Makerere University in Uganda, the University of Nairobi in Kenya, the University of Dar es Salaam in Tanzania, the National University of Rwanda, Université Cheikh Anta Diop in Senegal and in South Africa the universities of the Witwatersrand, Cape Town, Stellenbosch, Pretoria, Kwazulu-Natal, and Rhodes. (Source: *African Research Universities Alliance Launched*, Karen MacGregor, 10 March 2015, Issue No:358)
- African leaders endorsed an African Academy of Sciences proposal to establish an Africa-wide funding platform. This pan-African platform, set up by the African Academy of Sciences (AAS) and the NEPAD (New Partnership for Africa's Development) Agency, will initially focus on health research and later expand to other areas such as food and nutrition, energy, and the environment. The AESA (Alliance for Accelerating Excellence in Science in Africa) platform will identify challenges that hinder rapid scientific advancement in Africa, run open calls for proposals with transparent review processes, actively manage grants, and evaluate and measure the impact of development funding.
- The World Bank has recently launched 19 Africa Centers of Excellence (ACE) in science, technology, engineering, and mathematics located at universities in Benin, Burkina Faso, Cameroon, Ghana, Nigeria, Senegal and Togo. A separate World Bank program, Tertiary Education In Africa,

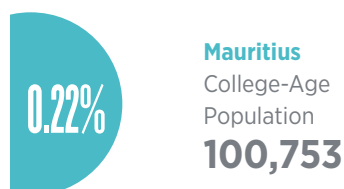
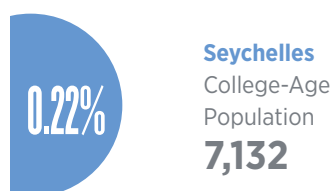
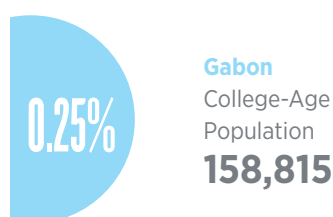
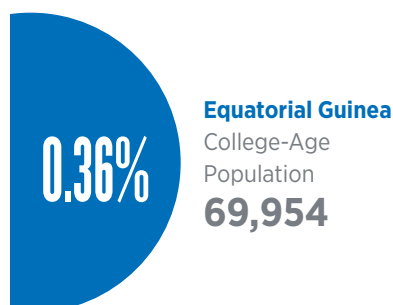
Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students (Five-Year Trend)

Country	2009/10	2013/14	%Change
Equatorial Guinea	78	253	224.4%
Congo, Dem. Rep. of/Zaire	249	571	129.3%
Angola	615	985	60.2%
Rwanda	451	720	59.6%
Gabon	306	397	29.7%

224.4%

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

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



Source: UNESCO Institute of Statistics; Indicator: 2013 Population of the official age for tertiary education, both sexes

focuses on six areas within the higher education sector in Sub-Saharan Africa: sustainable financing, diversification and public-private partnerships, governance and management, quality, labor market relevance and linkages, and regionalization.

- The MasterCard Foundation is augmenting its \$500 million Scholars Program by committing \$86.6 million to collaborate with four new African university partners to educate talented, yet economically disadvantaged, young people. The new partnerships include Makerere University in Uganda, University of Pretoria in South Africa, Kwame Nkrumah University of Science and Technology (KNUST) in Ghana, and University of Cape Town (UCT) in South Africa. These institutions join the MasterCard's global network of 21 partners in the Scholars Program, including Ashesi University College in Ghana, the first African University to partner with the Foundation in 2012.

- New universities have been created in almost all African countries and, in some cases, the increase has been dramatic over a relatively short period. For example, from 2005 to 2013, the number of universities in Nigeria increased from 51 to 128 and in Ethiopia from eight to 21. Kenya has officially upgraded 15 university colleges to full university status, bringing the number of public universities to 22 and expanding enrollment to 240,000. Although this expansion awaits full funding, it gives students more viable choices and expands the pool of potential graduate students.

- Sub-Saharan Africans are also exploring new models for learning that take advantage of emerging technologies. Microsoft 4Afrika Initiative, launched in 2013, aims to actively engage in Africa's economic development to improve the continent's global competitiveness. By 2016, the 4Afrika Initiative plans to help place tens of millions of smart devices in the hands of African youth, bring one million African small- and medium-sized enterprises (SMEs) online, upskill 100,000 members of Africa's existing workforce, and help an additional 100,000 recent graduates develop employability skills, 75 percent of whom Microsoft will help place in jobs.

- EdX, the open online learning platform co-founded by Harvard and MIT, has partnered with Facebook to give Rwandan students free access to collaborative, online courses. The partnership, dubbed "Social EDU," addresses five critical barriers to access by bringing together free content and data, affordable smartphones, localized social educational experiences, and a government that supports innovation.

- Students in EducationUSA centers are participating in growing numbers of online classes and discussion groups using Coursera's MOOC platform.

Recent Trends

- According to UN statistics, tertiary students from Sub-Saharan Africa "are the second most mobile in the world" after students from Central Asia. About one in every sixteen SSA students, or 5.6 percent, studies abroad, says the UNESCO Institute for Statistics (UIS) compared with figures for North America, where 1.4 percent of students go abroad for study.
- The Parthenon Group has developed insight into the transnational education market by tracking data from the volume of international student flows and student destinations. This information ranks the top five destinations for Sub-Saharan students as Africa (primarily South Africa), Europe, Australia, North America, and Southeast Asia.
- EducationUSA advisers report increased interest in sports scholarships in rugby,

Regional Student Totals by Top Five Countries of Origin

Country	2013/14	% Change 2012/13
Nigeria	7,921	8.3%
Kenya	3,201	-9.0%
Ghana	2,914	1.8%
South Africa	1,716	-5.5%
Ethiopia	1,516	3.0%

Sub-Saharan Africa

tennis, basketball, and soccer. U.S. institutions' recruitment in SSA is on the rise. The Council for International Schools (CIS), MasterCard Foundation, and MBA Tours have begun annual recruiting events. In addition to individual recruiters, many higher education institutions are partnering and recruiting in small groups.

- The mobile phone is the leading communication device in the SSA consumer market. Mobile users in the region show a preference for using their mobile phones for a variety of activities that are normally performed on laptops or desktops. In fact, mobile broadband is now the primary way that many SSA consumers access the internet. Seventy percent of SSA mobile users browse the web on their devices in comparison to six percent who use desktop computers. By the end of 2019, Ericsson forecasts there will be 930 million SSA subscribers, up from 635 million in 2014. The rapidly changing social and technological dynamic in ICT, complemented by new devices, has driven the increase in subscription numbers. (*Ericsson Mobility Report*, June 2014).
- In addition to providing access to the internet, online messaging service (OMS) providers have been present in a number of markets in SSA for several years and are now seeing rising

usage levels as a result of increased smartphone use and higher speed networks. The region is starting to see its own locally developed OMS providers. One example is MXit, developed in South Africa and citing nearly five million active monthly users. The impact of these OMS providers is evident in markets like South Africa where more than half of adult users living in cities and towns are using WhatsApp on their phones, according to recent research into the use of social media and instant messaging conducted by World Wide Worx and Fuseware. In Zimbabwe, WhatsApp usage now accounts for nearly a quarter of entire mobile data traffic services. (GSMA Intelligence: *The Mobile Economy 2014 / Sub-Saharan Africa*).

- Interest in English language learning continues to grow. Advisers encourage students to learn English and take English proficiency tests at home before applying to universities in the United States so they are better prepared to enter degree programs directly.

Countries in the Spotlight

Currently, the Sub-Saharan African countries sending more than 1,000 students to the United States for credit-bearing studies are Nigeria (7,921), Kenya (3,201), Ghana (2,914), South Africa (1,716), Ethiopia (1,516), Cameroon (1,285),

Zimbabwe (1,206) and Côte d'Ivoire (1,116). Countries with more than 40 percent of their undergraduates enrolled in U.S. community colleges are Angola, Benin, Burkina Faso, Democratic Republic of the Congo, Republic of the Congo, Equatorial Guinea, Eritrea, Gabon, Malawi, Mali, and Niger (countries with fewer than 100 undergraduate students in the United States are not included). Note that Francophone and Lusophone countries predominate. In the entire region, 28 percent of undergraduates are attending community colleges.

Over the past five years, Angola, Democratic Republic of the Congo, Equatorial Guinea, Gabon, and Rwanda have shown more than 50 percent growth in the number of students studying in the United States. Burundi, Republic of the Congo, and Côte d'Ivoire are showing between 36 to 44 percent growth over the same five-year period.

Top senders of intensive English language students to the United States are Angola, Republic of the Congo, Democratic Republic of the Congo, Côte d'Ivoire, Gabon, Mali and Senegal.

What to Expect in the Next Three to Five Years

- Africa faces a huge increase in the number of high-school graduates seeking admission to local higher

EducationUSA Regional Reach

2014 EducationUSA in Sub-Saharan Africa made **839,501** contacts

Centers	Outreach	Virtual*
Contacts made through Advising Centers.....330,787 Advising center-based contacts329,919 U.S. institution representative visits868	Contacts made through Outreach Activities.....437,819 Education fairs.....56,998 American Corners/ Centers.....16,615 Local Universities/ Secondary Schools104,804 Other fairs/conferences/ seminars16,153 Host government events892 Embassy/consulate events.....812 Public locations228,485 Other activities13,060	Contacts made through Virtual Platforms.....70,895 Social Media Platforms.....70,368 Webinars, DVCs527

* Includes social network page likes, profile friends, or group members; video views; Skype contacts; blog and mini-blog followers; digital video conference participants; and EdUSA webinar participants.

education institutions that lack capacity in terms of facilities, instruction, and funding. In Ghana, Kenya, Malawi, and several Francophone countries, double the current number of students will vie for university entrance because of structural changes to the university system and long strikes or political disruptions that sometimes result in a lost academic year. These developments represent a recruiting opportunity for U.S. colleges and universities.

EducationUSA advising centers have increased their capacity to guide students through competitive admissions processes, resulting in more well-qualified African students applying to study in the United States.

- Africa is going digital. While just 16 percent of the continent's one billion people are currently online, that picture is changing rapidly.

Evidence can already be seen in Africa's major cities, where consumers have greater disposable income, more than half have internet-capable devices, and 3G networks are up and running. Significant infrastructure investment—for example, increased access to mobile broadband, fiber-optic cable connections to households, and power-supply expansion—combined with the rapid spread of low-cost smartphones and tablets, has enabled millions of Africans to connect for the first time. There is a growing wave of innovation as entrepreneurs and large corporations alike launch new web-based ventures. (Source: <http://goo.gl/qpdvem>)

- Improvements in technology have resulted in increased communication with students via virtual platforms, such as Google Hangouts, Skype, and mobile messaging. This includes sessions with U.S. higher education representatives who share the goals of increasing the number of SSA students studying in the United States.

Foreign Government and Private Funding

Angola, Botswana, Equatorial Guinea, Mauritius, Namibia, Nigeria, and Rwanda offer government scholarships on a limited scale. Most scholarships in Angola, Equatorial Guinea, Ghana, and Nigeria are tied to the oil industry. The Rwanda Presidential Scholars program works with a group of 19 U.S. institutions.

The Botswana, Mauritius, and Namibia scholarship programs benefit top-ranking students in the national exams who can choose to study in the United States or other countries. Contact EducationUSA advisers for details.

Virtual and Social Media Usage

- An increasing number of Sub-Saharan Africans have access to the internet and social media, particularly through smartphones and feature phones. These are increasingly used by younger users to get news and information.
- Facebook is the dominant social media platform with Google+, WhatsApp, and Twitter as significant secondary players. Vernacular language social media platforms may develop in larger markets, particularly as internet access widens to include those with lower incomes. (Source: *The Balancing Act August 2014 Report, Sub-Saharan Africa Media Landscape Report - Then, Now, and in the Future*)

- Skype, Google+ Hangouts, and newrow work well in most countries and are easy to use for everything from cohort sessions to individual admissions interviews. SSA advisers have found it is especially effective to set up discussions between students on a U.S. campus from a particular country and an EducationUSA advising center, as this rapidly increases applications.

- Four out of five Africans use SMS messaging, the most popular application being WhatsApp. Lower-cost feature and smart phones now being introduced will accelerate the switch to more advanced technology. A mobile outreach strategy should include SMS and feature phones to reach prospective students.

Successful Recruiting Strategies

For admissions visitors, recruiters, and college-fair goers: traveling with larger group tours works well for a first visit to the region, after which many admissions representatives

EducationUSA Study Abroad

Top Five Receiving Countries in the Region

Destination	2012/13	% Change	Old	New	% change
South Africa	5,337	17.6%	4,540	5,337	17.6%
Ghana	2,086	-4.7%	2,190	2,086	-5.0%
Kenya	1,238	0.6%	1,231	1,238	0.6%
Tanzania	1,238	11.0%	1,115	1,238	10%
Uganda	692	-3.4%	716	692	-3.5%

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

Country Name	2008/09	2012/13	% Change
Madagascar	70	145	107.1%
Zambia	185	366	97.8%
Rwanda	203	366	80.3%
Botswana	183	326	78.1%
Ethiopia	133	231	73.7%

Sub-Saharan Africa

prefer to travel in smaller groups for customized impact. EducationUSA advisers can help U.S. institutions determine the best time to visit, learn about local customs and best approaches, and set up schedules that will maximize the quality and quantity of students met.

Recruiting strategies that work:

- Offer scholarships and financial aid. An effective way of enabling African students to enroll at your institution is to combine smaller scholarships into full awards. Email messages to SSA’s REACs and posts to EducationUSA Africa’s Facebook group (<http://goo.gl/IW8QXR>) will get the word out.
- Avoid broad assumptions about finances. Although EducationUSA students were awarded over \$31 million in financial assistance in 2014, African families spent as much as \$800 million on U.S. study.
- When in doubt about academic and financial documents, consult the EducationUSA advisers in the countries concerned.
- Focus on institutional partnerships, sister-city agreements, alumni networks, historical ties, and research connections.
- Explain fees and financial aid in detail and provide alternatives to credit card payments whenever possible. Many African students either don’t have or cannot use credit cards.
- Recruit through alumni who have returned to their home countries and U.S. study abroad students who are in-country.
- Recruit through EducationUSA, as African students and parents are often suspicious of local commercial agencies.
- Join the EducationUSA Africa Facebook group where African higher education news and student success stories are posted.
- Set up digital video conferences (DVC), newrow, Google+ Hangouts, or Skype discussions between students on your campus from a particular country or sub-region and an EducationUSA advising center, as this personal connection can encourage applications.

Regional EducationUSA Events

Every year, representatives from more than 100 institutions meet African students in person at EducationUSA centers. EducationUSA advisers also schedule fairs and school/university visits, hotels and local transport, and briefings on local educational systems.

In October/November 2015, The MBA, CIS, and MasterCard Foundation Tours will return to Sub-Saharan Africa.

The EducationUSA site announces country-specific information about upcoming fairs, webinars, and other events and activities. Several EducationUSA advising centers are planning local events during the year and gearing up for our long-awaited Africa Regional Forum in 2016.

The United States Department of Commerce and EducationUSA International Trade Administration education mission to South Africa and Ghana (with an optional stop in the Côte d’Ivoire) will take place March 6–10, 2016. Registration information can be found at: <http://goo.gl/tkBg60>.

Fairs and Conferences

In addition to the in-person student recruitment opportunities offered through participation in EducationUSA fairs and conferences, representatives of U.S. institutions often capitalize on these events to receive a country briefing from EducationUSA advisers, meet with U.S. embassy public affairs and consular staff (subject to scheduling availability), make a presentation at an EducationUSA advising center, and visit local high schools and universities. Contact EducationUSA advisers to explore options for maximizing the impact of your participation.

Center Events

Stay connected to the EducationUSA Africa closed group on Facebook (<http://goo.gl/eB2rVL>) and check center pages on the EducationUSA website (www.educationusa.state.gov) for the latest events at advising centers. Contact advisers if you are interested in setting up programs online. ★

Best Times of Year to Interact with Students

EducationUSA advisers will work with you to make your visit a success. EducationUSA recommends visiting during the following months:

West Africa June to mid-July, October–November, January–March
Southern Africa February–May, July–August
East Africa March–June, October–November
Sudan January–April
Malawi May–August
Zimbabwe May–July, September

The least productive times to connect are during Ramadan, Easter, Christmas, and exam periods (April–June and November–December).

U.S. Study Abroad in Africa

Sub-Saharan Africa is fast becoming a popular alternative destination for U.S. students studying abroad. The number of U.S. students studying in SSA has shown steady growth from 9,484 students in 2008–09 to 13,411 in 2012–2013. Fourteen SSA countries hosted more than 100 students in 2012–2013. Within this group there have been some surprising developments in the countries U.S. students are choosing. Several countries —Kenya, Tanzania, Rwanda, Zambia, Botswana, and Ethiopia — have shown exceptional growth over the past five years in the numbers of U.S. students. The latest report indicates the top 10 countries hosting U.S. students from highest to lowest are South Africa, followed by Ghana, Kenya, Tanzania, Uganda, Rwanda, Zambia, Botswana, Senegal, and Ethiopia.

East Asia and Pacific

Regional EducationUSA Profile

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

EducationUSA advising centers in **East Asia and Pacific (EAP)** are as varied as the geographic region itself. As the trusted source of information on study in the United States, EducationUSA advising centers are located in Embassies, Consulates, Fulbright Commissions, and American Spaces in many countries and partner with local universities, libraries, and NGOs in others. Regional Educational Advising Coordinators (REACs) and advisers act as guides to understanding the region's vast educational landscapes.

Advisers utilize social media, websites, and SMS text messages to provide virtual advising. Advising centers in China, Indonesia, and Japan rely heavily on technology to reach students while in-person advising is more common in Australia, Malaysia, and Taiwan. In some parts of the region, EducationUSA works with local and national media to reach a broader audience through news articles, advertisements, and general information about higher education opportunities in the United States.

EducationUSA centers in EAP stress the American cultural value of "Do It Yourself" to students, e.g., choose your school based on your own interests, write your own application, sit for tests, solicit letters of reference, and submit authentic transcripts. EducationUSA centers in EAP provide the tools, resources, and guidance that students and their parents need to feel confident in embracing academic integrity, which will prepare them well for their years ahead.

Regional Overview

Spanning a huge geographic area, East Asia and Pacific ranges from the

mountains of Mongolia to the mega-cities of China, from the temples and jungles of Laos and Vietnam, to the sandy beaches of Samoa and Australia. It encompasses a wide range of religions, languages, and countries and includes many of the top places of origin for international students in the United States. With a total sending population of over 400,000 students, the region accounts for nearly 50 percent of all international students in the United States, and the numbers are growing.

Recent Trends

- Over the past five years, the region averaged more than seven percent annual growth in student numbers to the United States. This growth is expected to continue, thanks to positive economic indicators and ongoing interest in international education. However, as competition increases and destinations in East Asia and Pacific continue to vie for market share, U.S. institutions have both a challenge and an opportunity to meet the growing demand for quality higher education for the region's quickly expanding middle class.
- Japan is the seventh leading country of origin with nearly 20,000 students in the United States. Although the number of Japanese students on U.S. campuses has shown a general decline since its peak of more than 47,000 students in 1997–1998, the rate of decline has slowed since 2009–2010. In recent years, the U.S. and Japanese governments have partnered to increase student mobility through institutional partnerships. Regional Educational Advising Coordinator initiatives, such as LL.M. Fairs, an LGBT fair, and collaboration with U.S. schools on English summer camps to encourage

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EducationUSA
Advising Centers
in the Region

23 Comprehensive
19 Standard
20 Reference



East Asia and Pacific

English-language learning and expose Japanese youth to opportunities for study in the United States, lay the foundation for future exchanges.

- The number of Australian students traveling to the United States increased more than six percent over the past year. Australia is also the top destination for Southeast Asian students studying abroad, making it a rich recruiting environment for third-country students, particularly for graduate studies.
- There is an upward trend in New Zealand mobility to the United States with a 17.5 percent increase in students over the last five years, and nearly 33 percent growth over the last 10 years. There are Kiwi students studying in all 50 states, and 48 percent of all New Zealand students in America study at public institutions.
- The current Southeast Asia (SEA) sub-regional total of 48,004 inbound students to the United States represents a 25 percent market share of the total number of SEA students who leave their home countries to pursue higher education (Source: UNESCO). The United States is the second most popular destination for students from Southeast Asia behind Australia.
- In 2014, there were 160 institutions of higher education in Taiwan—120 universities, 28 colleges, and 12 junior colleges enrolling more than 1.3 million Taiwanese students. Taiwanese students

primarily study abroad in the United States, the UK, Japan, Australia, and Canada. The United States remains the top study-abroad destination, and Taiwan ranks fourth in the world per capita in terms of students studying in the United States. The Ministry of Education in Taiwan is the agency responsible for formulating education policy at all levels, accrediting schools, and managing the public school system. Taiwanese students begin English education in the third grade, and students must meet minimum English competency requirements for graduation from almost all colleges/universities.

- Mongolian higher education institutions are increasingly submitting their programs to international accrediting organizations to gain international accreditation. University partnerships and joint-degree programs increase student interest in transferring to U.S. schools.

Countries in the Spotlight

Burma: Historically overlooked, Burma recently entered into the spotlight of U.S. university engagement. EducationUSA's annual university fair tour in Southeast Asia included Rangoon and added Mandalay as a second successful stop in 2015. Each of these fairs drew high numbers of participants in 2015 with 1,500 attendees in Mandalay and 1,000 in Yangon. According to *Open Doors*, Burma experienced 9.1 percent growth in the number of students studying in the United

States during the 2013–2014 academic year. As U.S. colleges and universities continue to explore Burma as an untapped opportunity for engagement, this growth in student mobility is expected to continue.

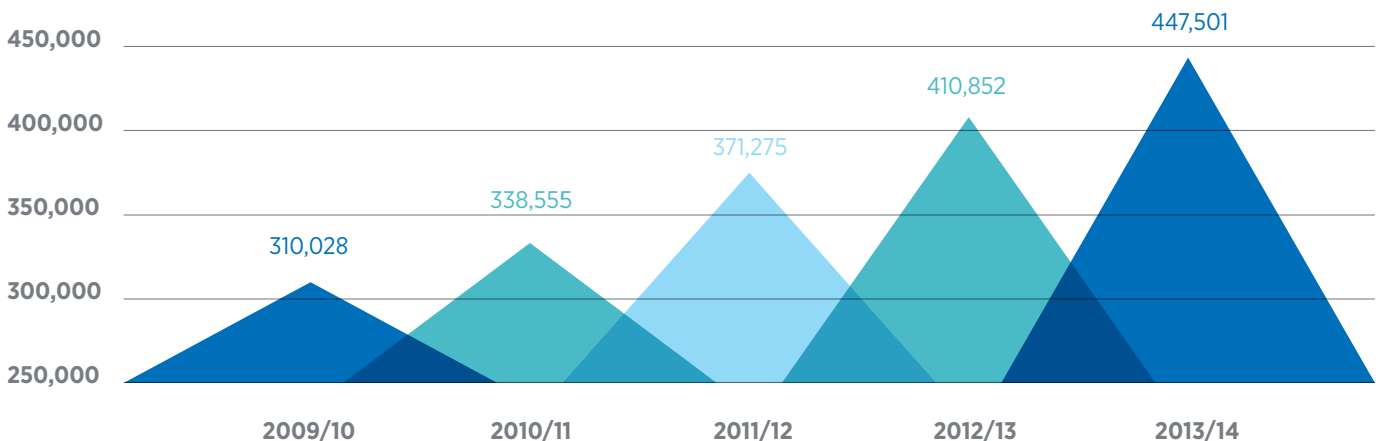
Cambodia: 2014 marked a sizeable uptick in the number of students studying in the United States with an overall growth of almost 10 percent. The country continues to exhibit potential for U.S. recruiters with an 11.4 percent growth in undergraduate students and 152.6 percent growth in non-degree program students (48 students).

China: China again tops the list of countries sending students to the United States. In fact, Chinese students make up nearly one third of all international students studying in U.S. colleges and universities. The number of Chinese students enrolled in U.S. institutions of higher education increased from 235,597 in 2012–2013 to 274,439 in 2013–2014, with undergraduate levels increasing by 18 percent. There is also increased demand among younger Chinese students for an overseas secondary education experience.

Hong Kong: The number of available undergraduate seats in Hong Kong universities is fewer than the number of students who can meet the entry requirements, making undergraduate admissions highly competitive. Only 20 percent of high-school graduates can enter public universities. The remaining 80 percent of graduates either study overseas or opt for alternative local

Student Mobility (Five-Year Trend)

Source: Institute of International Education, funded by a grant from the U.S. Department of State, *Open Doors Report on International Educational Exchange*





options. According to IIE's *Open Doors Report*, 8,032 Hong Kong students studied in the United States in 2013–2014, a one percent increase from the previous year. According to the most recent population census done by the Hong Kong Census and Statistics Department in 2011 (done every 10 years), persons aged 25 and below who were studying outside Hong Kong went to the UK, Australia, United States, mainland China, and Canada (in that order). With an increased demand for a highly-skilled and knowledgeable workforce in a wide array of fields, many students in Hong Kong choose to pursue graduate degrees.

Laos: The number of Laotian students studying in the United States has increased by 30 percent since the 2011–2012 academic year. As Laos assumes the role of Chair of the Association of Southeast Asian Nations (ASEAN) in 2016, the government will increase its focus on capacity building and English language training.

Mongolia: According to IIE's *Open Doors Report*, the number of Mongolian students studying in the United States has increased by over eight percent in 2013–2014 compared to 2012–2013. Out of 1,444 student total, 67 percent studied at the undergraduate level, 18 percent studied at the graduate level, and 15 percent were enrolled in OPT or non-degree programs. The Mongolian government is placing more emphasis on the funding of undergraduate and graduate studies in

the United States. Mongolian students at all levels may apply for a scholarship or loan to study at a U.S. university.

South Korea: South Korea is the third leading country of origin for students coming to the United States, with South Korean students composing close to eight percent of the total international student population—over 68,000 students. Although overall student numbers have decreased, strong ties, rapid economic development, and demand for English proficiency continue to drive enrollments in the United States. U.S. higher education offers attractive academic programs that support South Korea's thriving semiconductor, telecommunications, and automotive export industries. To prepare for work in these fields, students seek programs in business, English, engineering, law, and computer science.

Taiwan: The United States continues to be the top study-abroad destination for students from Taiwan, and Taiwan ranks as the sixth largest source of international students in the United States with 21,266 students in the last academic year. In 2013–2014, approximately 48 percent of students from Taiwan who studied in the United States pursued graduate studies, 28 percent undergraduate studies, and another 24 percent OPT or non-degree programs. A very high percentage of faculty members at Taiwan's universities have received PhDs in the United States. Among Taiwan's 41 cabinet members, 26 studied in the United States (15 hold PhD degrees).

Thailand: The number of Thai students studying in the United States is on the rise again. Recent trends indicate a growing interest in undergraduate programs among Thai students and undergraduate enrollments from Thailand are up 5.6 percent. However, U.S. graduate programs also continue to be popular in Thailand. Universities in Thailand have also transitioned their academic calendars to better align with the U.S. academic schedule. This transition should encourage student mobility and allow for greater participation in short-term study abroad and English language programs.

What to Expect in the Next Three to Five Years

- China announced a major reform of the National College Entrance Examination, known as "Gaokao." The current system was established in 1977. The English test will be removed from the main Gaokao examination and, rather than the single testing opportunity available under the unified exam, the English test will be offered to students separately and several times during the year. The reform also removed the policy of directing students into the arts stream or the science stream in the second year of senior high school. Instead, students will study a mix of arts and science subjects.
- Taiwan has recently seen an increase in the number of students, especially at the undergraduate level, studying abroad on short-term exchange programs.

East Asia and Pacific

These short-term programs often allow students to pay Taiwanese tuition rates for their study abroad experience through reciprocity agreements. Taiwanese universities will continue to look for ways to cooperate and partner with U.S. universities to encourage Taiwanese students to study in the United States as exchange students or pursue dual-degree programs. These partnerships allow students an easier admissions process as well as a potentially lower cost of study in the United States. University partnerships are often cited by Taiwanese students as a factor in how they chose their host university in the United States.

- Australia and the United Kingdom will continue to be top competitors for the United States, while regional demand for students will increase most notably from China, New Zealand, Malaysia, and Singapore.
- While the number of Asian regional education hubs will grow significantly over the next five to 10 years, both the rate of adoption and capacity for engagement in international education are not likely to be as high as local governments predict.
- The governments of Southeast Asian nations, such as Malaysia, Indonesia, and Thailand, have acknowledged a gap in the availability and effectiveness of vocational training that has had an adverse impact on workforce development. In response to this shortfall, interest in community college and non-degree programs

will continue to grow in the region as the need for skills-based education continues to grow.

- Malaysia, Singapore, and other countries in Southeast Asia are making efforts to build capacity in their own higher education sectors to attract more international students from across the region. Some Southeast Asian governments will continue to invest in their educational infrastructures to become higher education “hubs” and offer competition to the United States and other world regions.
- In 2015, continued alignment of economic and educational policy initiatives through the Association of Southeast Asian Nations’ (ASEAN) multilateral grouping of governments is aimed at expanding the middle class and promoting sub-regional skills development initiatives in areas like English language training. These collaborative policy initiatives are, in part, designed to facilitate new opportunities for global academic engagement.
- The government of the Philippines is implementing a new K-12 curriculum to establish a more holistic approach to primary and secondary education that is better aligned with those in other world regions. The curriculum will be structured as follows: Kindergarten/primary (six years), junior high school (four years), and senior high school (two years). Upon reaching senior high school, students will choose one of three tracks: Academic, Technical-Vocational-Livelihood, or Sports and

Arts. The first cohort of graduates from the new K-12 model will be in 2018 (Source: Department of Education, Philippines).

- More institutional partnerships or joint-degree programs will be set up in the region, offering students an option to earn a U.S.-style degree without leaving their home country. In some parts of the region, these relationships are activity incentivized through local providers and governments.
- Tokyo will host the Olympics in 2020, and the planning committee will need the help of ESL programs to train the private sector, giving opportunities for U.S. providers to establish English programs in Tokyo.
- While Australia and New Zealand are known as destination countries themselves, the Pacific is likely to become a focal point for international student recruitment for the United States, given new opportunities for economic trade and linkages generated by U.S. foreign assistance. With the increased numbers of Americans opting for short-term programs in New Zealand, more and more New Zealanders will be inspired to do the reverse.
- Papua New Guinea is fast becoming an accessible market for graduate students in areas related to sustainability and oil and gas.
- EAP is a prime market for community colleges. Many students in the region are

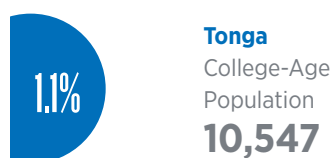
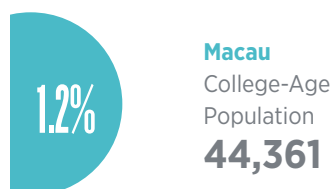
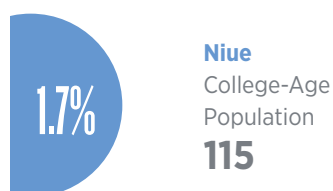
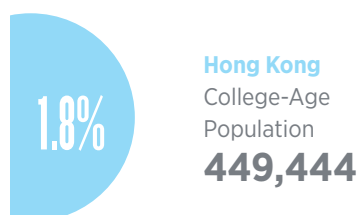
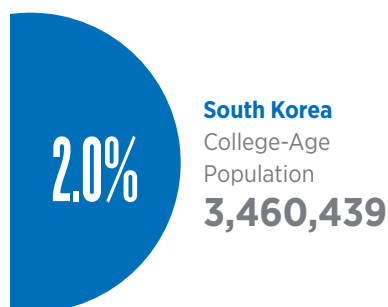
Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students (Five-Year Trend)

Country	2009/10	2013/14	%Change
China	127,628	274,439	115.0%
Myanmar/Burma	695	1,042	49.9%
Australia	3,296	4,377	32.8%
Vietnam	13,112	16,579	26.4%
Cambodia	347	432	24.5%

115%

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

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



Source: UNESCO Institute of Statistics; Indicator: 2013 Population of the official age for tertiary education, both sexes

unable to afford tuition at a four-year institution, so promoting 2+2 programs is a natural fit. Short-term programs will continue to be in higher demand than four-year degrees. China, South Korea, Vietnam, and Japan are the top senders of international students to community colleges in the world—over 40 percent of all international students come from these four countries.

- Mongolia is undergoing major developmental processes in the higher education sector, so there will be more higher education institutions interested in establishing partnerships or joint programs with U.S. schools. The number of Mongolian students financially able and academically prepared to study in the United States will increase in the coming years as more qualified students graduate from high schools with sufficient knowledge of English and other general subjects. More Mongolian students will be applying for engineering, technology, natural and environmental sciences, preschool and elementary education, and agriculture, as the Mongolian government offers generous scholarships in these areas.
- ASEAN Economic Integration in 2015 will enhance the Southeast Asia international student recruitment market by facilitating greater English proficiency and regional purchasing power through the expansion of the middle class.
- Competition from regional education hubs in Australia, China, Malaysia, and Singapore will coincide with a diversification of low-cost offshore degree offerings, e.g. English-medium degree programs offered by Chinese universities in Thailand.

Foreign Government and Private Funding

- Australia: Endeavour Research Fellowships provide financial support for Australian postgraduate and postdoctoral students for short-term research in the Asia-Pacific region, the Americas (including the United States), Europe, and the Middle East. The annual government investment in international scholarships is approximately \$1.6 billion.
- Burma: The Government of Burma currently provides no financial aid

or scholarships for students to study abroad. Most students rely on a mix of family support, significant financial aid provided by colleges/universities, and private scholarships. Below is a partial list of organizations providing scholarships for Burmese students:

- **Supplementary Grant Program Asia (SGPA)** – Open Society Foundation (<http://goo.gl/GLXhqu>)

- **Cetana Educational Foundation** (<http://goo.gl/s930QL>)

- **Prospect Burma** (<http://goo.gl/f61kzA>)

- China: In 2015, the China Scholarship Council provided financial assistance to 25,000 Chinese students and scholars for the Undergraduate Exchange Program, Special Arts Talent Program, Partnership Collaboration, Teacher English Study Program, and overseas graduate and postgraduate studies. The Chinese government has set up a series of scholarship programs to sponsor international students, teachers, and scholars to study and research in Chinese universities, such as the Bilateral Program, Chinese University Program, Great Wall Program, EU Program, AUN Program, PIF Program, and WMO Program (<http://www.csc.edu.cn>).
- Hong Kong: The Sir Edward Youde Memorial Fellowships aim to finance outstanding Hong Kong students for overseas postgraduate studies. Recipients are expected to contribute significantly to the development of

Regional Student Totals by Top Five Countries of Origin

Country	2013/14	% Change 2012/13
China	274,439	16.5%
South Korea	68,047	-3.7%
Taiwan	21,266	-2.7%
Japan	19,334	-1.2%
Vietnam	16,579	3.0%

East Asia and Pacific

- Hong Kong after graduation (www.sfaa.gov.hk/eng/scholar/seym3.htm).
- Indonesia: The Ministry of National Education (DIKTI) awards approximately 1,000 scholarships per year for graduate study by university faculty (www.beasiswa.dikti.go.id). The Ministry of Trade (www.kemendag.go.id) awards scholarships, while the Papua Provincial Government (www.papua.go.id) launched their 1,000 PhDs initiative. The Ministry of Foreign Affairs (www.deplu.go.id), the Ministry of Communication and Informatics (www.depkominfo.go.id), and the National Development Planning Agency (www.bappenas.go.id) also offer graduate scholarships.
 - Japan: The Ministry of Education (MEXT) set a goal to send 120,000 Japanese university students and 60,000 Japanese high-school students abroad by 2020. These objectives are in line with the goals and recommendations of the CULCON Education Task Force. To lessen the financial burden on university students who are willing to study abroad, MEXT provided additional scholarships for short-term and long-term study abroad in 2014. MEXT also launched the Global 30 project to invite 300,000 international students to Japan. Thirteen universities were selected by the Japanese Government to be members of the Global 30 project.
 - Malaysia: The Public Service Department of Malaysia offers scholarships for both undergraduate and graduate study abroad with a focus on the fields of medicine, dentistry, pharmacy, veterinary medicine, engineering, and science and technology (www.jpa.gov.my). PETRONAS offers a comprehensive list of scholarships (www.petronas.com.my/education/petronas_sponsorship.aspx).
 - Mongolia: The Mongolian Ministry of Education, Culture, and Science (MECS) offers scholarships for undergraduate students who participate successfully in the International Olympiads in environmental sciences, physics, mathematics, and chemistry. Students may also request funding for undergraduate studies at the world's top 100 colleges and universities, as enumerated by the Times Higher Education Supplement and Shanghai ranking. MECS offers government loans for undergraduate students who are studying in their sophomore and junior years at U.S. schools. For graduate students, MECS also offers government loans if a student is admitted to one of the world's top 500 schools (as named by the Times Higher Education supplement and Shanghai ranking), including colleges and universities in Australia, Japan, the United Kingdom, and the United States. The U.S. Embassy in Mongolia also offers scholarships to study in the United States at undergraduate and graduate levels.
 - South Korea: The Korean Student Aid Foundation offers up to \$50,000 for talented students in the sciences for both international and domestic study. Fulbright scholarships and grants are available in a number of fields, including up to \$40,000 for highly qualified master- or doctorate-seeking students. The Korean government, private companies, and nonprofit organizations also offer generous scholarships.
 - Taiwan: Taiwan's Ministry of Education, together with foreign governments, provides government study abroad scholarships for master- and doctorate-degree-seeking students (<http://goo.gl/i3UA82>). The Taipei City government offers loans to students who are studying in accredited MA, PhD, and professional certificate programs (<http://goo.gl/n5wQ47>).
 - Vietnam: Government-sponsored training of university faculty and government officials has two sources: Project 165 (<http://vp165.vn>) sponsors 1,500 government officials at overseas universities for graduate level training through 2015, and Project 911 (www).

EducationUSA Regional Reach

2014 EducationUSA in East Asia and Pacific made **1,190,951** contacts

Centers		Outreach	Virtual*
Contacts made through Advising Centers.....		Contacts made through Outreach Activities.....	Contacts made through Virtual Platforms.....
73,771		160,014	957,166
Advising center-based contacts		Education fairs.....	Social Media Platforms.....
72,773		52,769	956,841
U.S. institution representative visits		American Corners/ Centers.....	Webinars, DVCs
998		7,170	325
		Local Universities/ Secondary Schools	
		49,550	
		Other fairs/conferences/ seminars	
		24,196	
		Host government events	
		6,504	
		Embassy/consulate events.....	
		4,539	
		Public locations	
		5,512	
		Other activities	
		9,774	

* Includes social network page likes, profile friends, or group members; video views; Skype contacts; blog and mini-blog followers; digital video conference participants; and EdUSA webinar participants.

vied.vn) sponsors 10,000 university faculty for doctoral study at overseas universities through 2020.

Virtual and Social Media Usage

• **Australia, New Zealand, and the Pacific Islands:** Facebook and Twitter users dominate these markets. However, Bebo remains a popular social networking site. Internet usage across the Pacific Island nations remains relatively low. Fiji and Micronesia lead in total market penetration at just under 33 percent while Papua New Guinea, the Marshall Islands, Tonga, and Kiribati hover around five percent. In Australia and New Zealand, 3G penetration is now at 81 percent and 89 percent, respectively. Social networking via the internet is still common, although smartphone and mobile technology is emerging.

• **China:** According to the China Internet Network Information Center (CNNIC) report, by June 2014 there were 632 million internet users in China and 65 percent of them used WeChat. WeChat has become one of the main channels for Chinese internet users to obtain information, including about educational opportunities. Chinese students and their parents actively exchange information and discuss issues about study abroad in their WeChat friend circles.

• **Hong Kong:** Hong Kong has built one of the most sophisticated and dynamic telecommunications markets in the world. Hong Kong supports access to broadband connectivity for more than 80 percent of all households. The number of broadband subscribers represents about 75 percent of the total internet subscriber base. The most influential social networking site in Hong Kong is Facebook. WhatsApp, YouTube, and Instagram are also popular among youth for entertainment purposes. Unlike in the United States, there are not as many active Skype and Twitter users. Young people in Hong Kong tend to use social media channels primarily to keep in touch with friends. Therefore, personalized attention is still needed to reach students.

• **Japan and South Korea:** Popular platforms in Japan include Mixi, Mobage-town, Gree, LINE, Facebook, and Twitter. Popular platforms in Korea include Kakao, Facebook, Twitter,

LinkedIn, and local platforms Naver and Daum. Students access the vast majority of social networks via smartphone applications and mobile technology. South Korea is a world leader in embracing the latest high-speed mobile technology. In Seoul, an EducationUSA internship program was launched to promote peer-to-peer marketing and develop a student blog network. Japan's internet penetration is at 79 percent while South Korea is at 84 percent.

• **Mongolia:** Facebook is very popular and is the main social media tool for EducationUSA advising activities in Mongolia. Also, students spend a fair amount of time on YouTube watching videos with advice on study abroad. Wireless technologies have had great success and smartphones are becoming increasingly common, even in rural areas. Internet usage has grown rapidly in the last few years and dial-up, wireless, 3G, and internet modems are commonly used with smartphones or

notebooks. Especially in the countryside, the government prefers installing cell phone stations over laying land lines.

• **Southeast Asia:** A strong social media presence is vital to a holistic recruitment plan in Southeast Asia. Students in the region are highly active on global platforms, such as Facebook and Instagram, and social media platforms that vary by country, such as Line and Path are also popular in Thailand, Malaysia, and Indonesia. Periscope and Line@ are emerging social media applications predicted to have significant impact on institutions' ability to engage with users in the sub-region.

• **Taiwan:** The Taiwanese are tech savvy with internet penetration at 75 percent. According to recent reports, approximately 70 percent of cell phone buyers purchase smartphones. Social media and internet technology are crucial tools for attracting students. Facebook is the favored social media platform. The

EducationUSA Study Abroad

Top Five Receiving Countries in the Region

Destination	2012/13	% Change	New
China	14,413	-3.2%	14,413
Australia	8,320	-10.8%	8,320
Japan	5,758	9.0%	5,758
South Korea	3,042	12.9%	3,042
New Zealand	2,793	-5.9%	2,793

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

Country Name	2008/09	2012/13	% Change
Indonesia	176	493	181.1%
Cambodia	183	395	115.8%
Singapore	612	1,181	93.0%
Malaysia	137	237	73.0%
Philippines	158	273	72.8%

East Asia and Pacific

number of active Facebook users in Taiwan surpasses 14 million per month, or about a 60 percent penetration rate, and the number of daily users has hit 10 million. Currently, the EducationUSA Taiwan Facebook page (<http://goo.gl/y7BvIs>) has more than 3,100 fans, and the AIT Facebook page (<http://goo.gl/kAMZvf>) has more than 27,500 fans.

Successful Recruiting Strategies

- Create recruitment strategies with both students and parents in mind. Information in the local language can help reach parents. Develop attractive and easy-to-navigate mobile-ready websites with a link for international students. Invest in physical presence to build trust and name recognition.
- Hong Kong parents and students prefer to read print materials in traditional Chinese instead of simplified Chinese.
- Visit high-school counselors when you travel to the region to let them know more about your institutions and the application process.
- Establish and make use of partnerships. Develop agreements with community colleges to facilitate transfer students and highlight the cost-saving dimensions of such arrangements. Consider joint marketing with other like-minded U.S. institutions.
- Connect your alumni living in the region with the nearest EducationUSA advising center and build opportunities for them to represent your institution.
- Focus on the familiar, e.g., sister-city agreements and immigrant ties. Students in EAP often look to success stories from their peers for added guidance during the decision-making process, so alumni are an excellent way to connect with advising centers and students across the region.
- Develop robust financial aid programs, proven tools for recruitment that can also be useful for longer-term institutional brand building. Publicize these possibilities, including research or teaching assistantships.
- Target secondary cities that can be more productive for recruitment compared to the demands of brand-

conscious residents in capitals and other major cities. Think in terms of a strategic long-term vision (e.g., three years) and target locations/areas to make an investment that will yield returns in the future.

- Seek niche markets where students are looking for a specific type of school or program, such as sports, HBCUs (popular in the Pacific Islands), women's colleges, or LGBT-friendly schools.
- Show the students introductory videos of your school and student life in an academic environment and include international student testimonials about their experiences being students at your institution.

Regional EducationUSA Events

Use the EducationUSA website to find country-specific information about upcoming fairs, webinars, and other events and activities at EducationUSA advising centers.

Fairs and Conferences

In addition to the many in-person student recruitment opportunities offered through EducationUSA fairs and conferences, representatives of U.S. institutions can capitalize on these events with a country briefing from EducationUSA advisers, a meeting with U.S. Embassy public affairs and consular staff (subject to scheduling availability), a presentation at an EducationUSA advising center, and/or a visit to a local high school or college. Higher education representatives should contact the EducationUSA staff organizing these events to explore options for maximizing the impact of their participation.

- **The EducationUSA Pavilion at the Asia-Pacific Association for International Education (APAIE):** Join the annual APAIE conference for an opportunity to create and develop partnerships between U.S. universities and institutions in the EAP region. EducationUSA hosts a pavilion at the event to better enable U.S. institutions to meet East Asian and Pacific higher education institutions and to lower the costs of participation.
- **Southeast Asia College Fair Series:** For more information, visit educationusa.state.gov.

- **Mongolia:** the EducationUSA Mongolia College Fair 2015 will be held October 16–17, 2015 in Ulaanbaatar with optional travel to a second city and school visits.

- **EducationUSA Law Conference and LL.M. Fair:** This fair targets current and emerging LLM markets through a free fair in various cities within the region.

- **The EducationUSA Fall Fair in Auckland and Tokyo:** Both of these free fairs take place in mid-September.

- **The EducationUSA Get Out of Seoul (GOOS) Fair:** This fair focuses on secondary markets in South Korea.

Center Events

Check with individual centers to find out about their activities. Attract students from all of EAP by participating in newrow and other online info sessions.

Best Times of Year to Interact with Students

As a general rule for EAP, March to May and August to November are the best times to engage with students. However, please check with the local advising center to see whether there are exams or holidays before planning your visit.

The Lunar New Year, usually in January or February, impacts most of the region and many businesses and schools are closed during this time.

U.S. Study Abroad in East Asia and Pacific

Open Doors reported that 14,413 American students studied in China in the 2012–2013 academic year, a decrease of three percent. China remains fifth among the leading host destinations for Americans studying abroad behind the United Kingdom, France, Italy, and Spain, and ahead of Germany, Costa Rica, and Australia. Australia, Japan, South Korea, and New Zealand, along with China, remain among the top 25 destinations for U.S. students studying abroad with increases of 12.9 percent going to South Korea and nine percent going to Japan in 2012–2013. Southeast Asia saw a 14 percent increase in the number of U.S. students participating in study abroad programs. Five countries hosted more than 300 students in 2012–2013, and Singapore and Thailand each hosted more than 1,000 students. ★

Europe and Eurasia

Regional EducationUSA Profile

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

Europe and Eurasia (EUR) EducationUSA centers are located in Fulbright Commissions, American Councils, binational centers, U.S. Embassies and Consulates, American Corners, universities and high schools, and local NGOs. In September 2014, EducationUSA in Europe and Eurasia hosted an EducationUSA Regional Forum in Tbilisi, Georgia. Seventy-five advisers from thirty-eight countries across the region were joined by seventy-one representatives from U.S. higher education institutions, the U.S. Department of State, and U.S. Embassies in the region. The Regional Forum was both a training opportunity and a chance for advisers and U.S. higher education representatives to share new information and develop strategies for student recruitment in this large and diverse region.

Regional Overview

Europe and Eurasia offer U.S. institutions a wide variety of outreach and partnership opportunities with highly-educated, well-prepared, and diverse student populations. European students generally have a high level of secondary education, possess excellent English skills, and are able to adjust relatively quickly to U.S. culture and student life. Interest in the United States among undergraduate students from Europe resulted in an increase of six and a half percent over the past five years across the continent. Most notable were the significant increases in countries like Spain (72.5 percent), Greece (58 percent), Norway (52 percent), Sweden (45 percent), and Georgia (41 percent). As of the 2013–2014 academic year, 40 percent of European students studying in the United States were studying at the undergraduate level, and interest in community colleges continues to grow. Top-sending countries

to community colleges include Poland, Portugal, Russia, Sweden, and Ukraine, and there is increased interest in Albania, the Czech Republic, France, and Moldova.

Thirty-two percent of Europeans studying in the United States are at the graduate level, according to the 2014 *Open Doors report*. The 2014 *Council of Graduate Schools' International Graduate Admissions Survey* noted a modest increase in European graduate-level applications, three percent compared to the global average increase of seven percent. The European countries with the highest percentage of students in U.S. graduate programs are Malta, Turkey, Greece, Romania, and Armenia. Of the European total, 5,616 of the 28,240 graduate students are from Turkey, which represents 20 percent of the total number of graduate students in the United States. Germany, the UK, France, and Russia join Turkey as the top five European graduate student senders to the United States.

Short-term and non-degree programs are popular among European students, especially among Western and Northern Europeans; 52 percent of students enrolled in these programs are Danes, 37 percent are Germans, and 34 percent are Austrians. France, the Netherlands, Spain, Finland, Norway, Sweden, and Ireland also send impressive numbers of students on these programs. Estonian non-degree students have increased 55 percent over the past five years. These statistics demonstrate the ongoing interest and value students from these countries place on U.S. study as complementing their degree programs at home. Students report that they enroll in short-term programs in the United States to gain

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EducationUSA
Advising Centers
in the Region

31 Comprehensive
38 Standard
38 Reference



Europe and Eurasia

practical skills and develop personal and professional networks that are truly global in nature.

In 2014–2015, EducationUSA recruitment events brought record numbers of U.S. institutions to Europe and Eurasia. Lisbon, Madrid, Valencia, Hamburg, Heidelberg, and Dnipropetrovsk (Ukraine) each inaugurated new U.S. higher education fairs. New recruitment tours included the Southeastern Europe Tour (five countries) and the Baltics Tour (four cities/three countries). Other highlights included the record-breaking College Day in London with over 4,700 visitors and 180 exhibitors, and the Tbilisi fair, held in conjunction with the Europe and Eurasia Regional Forum, which hosted an unprecedented 50 U.S. exhibitors and 3,000 students.

EducationUSA advising centers initiated new Competitive College Clubs in Bosnia, Hungary, and Serbia to add to the existing cohort-advising programs in Armenia, Azerbaijan, Belarus, Croatia, Cyprus, Georgia, Macedonia, the Netherlands, Portugal, Russia, Spain, Ukraine, and the United Kingdom. In Russia, EducationUSA advisers piloted an online-advising cohort program, allowing for more inclusive participation of students throughout the vast country. Hungary launched the Roma Student Initiative to reach underserved Roma students throughout the country. These activities offer intensive advising opportunities for top-notch students to apply and gain admission to degree programs in the United States.

The Opportunity Funds program expanded in the region with new programs in Armenia and Macedonia. Opportunity Funds supports talented, economically disadvantaged undergraduate and graduate students of great potential with the upfront costs of applying to U.S. institutions. Since 2007, EducationUSA Opportunity Funds programs in Europe and Eurasia have assisted more than 600 students from Belarus, Bosnia, Russia, and Ukraine to apply to study in the United States. The Opportunity Funds program is now available through EducationUSA advising centers in seven countries, including Armenia, Belarus, Bosnia, Macedonia, Russia, Serbia, and Ukraine. EducationUSA conducts extensive outreach to prospective undergraduate and graduate students who are eligible to enroll in this unique program.

Recent Trends

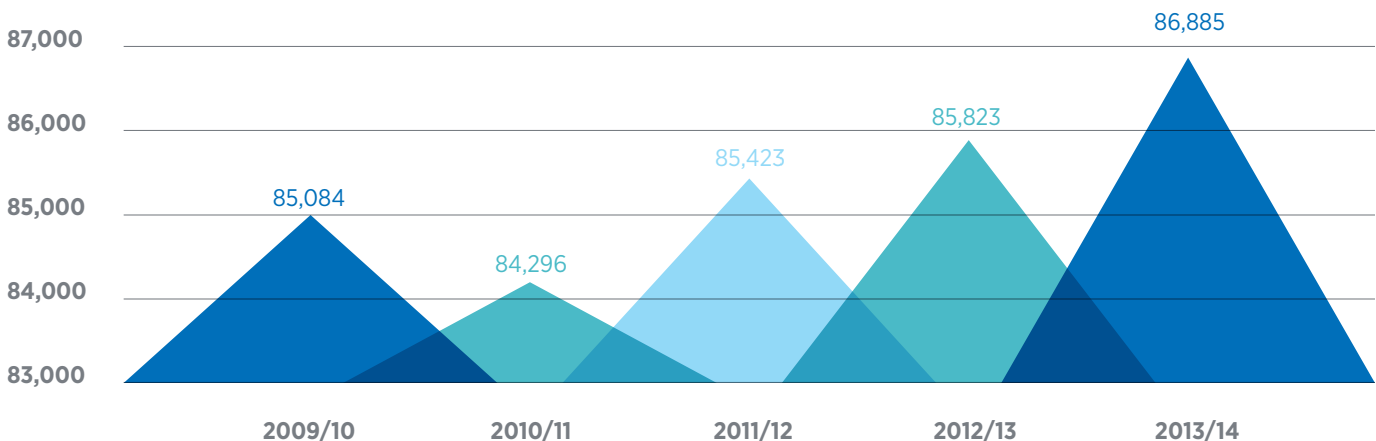
- 86,885 students from Europe and Eurasia studied in the United States in academic year 2013–2014, an increase of just over one percent. While European Union (EU) countries compete with the United States for international students, interest in studying in the United States among European and Eurasian students remains strong.
- Notable growth in student mobility in 2013–2014 was seen in Norway (9.9 percent), Luxembourg (9.2 percent), Georgia (8.8 percent), Denmark (8.2 percent), United Kingdom (7.6 percent), the Netherlands (6.5 percent),

and Russia (6.8 percent increase in undergraduates, almost five percent increase overall).

- Universities in the wealthier European Union countries continue to attract students from Central and Eastern Europe due to more affordable or free tuition and proximity to other European countries. Over the past five years, 21.2 percent more Slovak students studied in EU countries while the United States experienced a drop of nearly the same percentage. Precipitous drops like this, also reported in other countries, can be attributed, in part, to demographic changes. For example, Bulgaria and Romania have each had 22 percent decreases in their university-age populations over the past 10 years.
- European universities seek active partnerships with U.S. higher education institutions. They give students the opportunity to experience U.S. higher education while still earning their degree at home. In April 2015, the Norwegian Center for International Cooperation in Education (SIU) hosted a delegation of U.S. university leaders with the aim of establishing new strategic partnerships. The University of Luxembourg requires a semester abroad for its students and is seeking more U.S. partnerships to serve as destinations for their students.
- Despite political turmoil and conflicts in a number of countries in the region, Eurasian students remain very interested in U.S. educational opportunities.

Student Mobility (Five-Year Trend)

Source: Institute of International Education, funded by a grant from the U.S. Department of State, *Open Doors Report on International Educational Exchange*





EducationUSA is reaching more Eurasian students through expanded online advising and is implementing additional recruitment events to overcome some of the challenges associated with working in this region. The EducationUSA Eurasia Tour and alumni fairs are the only U.S. higher education fairs in the region, and interest and participation levels remain high.

Countries in the Spotlight

Cyprus: A new EducationUSA advising center has been launched, managed by two senior EducationUSA advisers in Cyprus. The Competitive College Club, now in its third year, successfully generated over \$3 million in scholarships for Cypriot students.

Germany: Germany is one of the United States' most important education mobility partners in Europe, and there are numerous ways to interact with German students and universities:

- **High School Programs:** Germany is the leading sending country for U.S. high-school exchanges with 6,585 students (China is next with 3,978). Alumni of these programs are an excellent target audience for recruiting for post-secondary study. EducationUSA advisers report great interest among German high-school students in U.S. study, not only through traditional high-school year-abroad programs, but also U.S. universities' summer sessions, to build practical skills, including English

language competency. A noticeable percentage of students interested in full-time university study in the United States have spent time in the United States as high-school exchange students, au pairs, or in other pre-college programs.

- **Undergraduate:** Study at a U.S. university as part of a German university degree is also highly sought after with university partnerships and exchange programs fulfilling the demand. The University of Tuebingen sends 150 students per year on university exchange programs, and the EducationUSA center there is a focal point for information on U.S. study. Advisers report that there is more interest in semester exchanges than available exchange placements, so U.S. universities that expand their university partnerships can expect to have more Germans on campus.

- **Short-term programs:** In the latest *Open Doors report*, 37 percent of German students in the United States are on short-term programs, demonstrating the value they place on experiential learning and skills building. Internships and volunteer opportunities in the United States are also in high demand.

- **Degree-seeking students:** In-state tuition rates for international students are very attractive for Germans as they make education in the United States affordable and a viable alternative to tuition-free education in Germany.

Ireland: The United States is one of Ireland's top international education partners. According to the 2014 *Open Doors* report, the United States is the second most popular study abroad destination for Irish students, while Ireland is the ninth most popular destination for U.S. students. In 2013–2014, 1,156 Irish students were studying in the United States, and 8,084 U.S. students studied in Ireland in 2012–2013. Irish and U.S. universities have developed several strategic partnerships, such as Science Foundation Ireland's U.S.-Ireland Research and Development Partnership.

Italy: Among European Union member states, Italy ranks fifth in student mobility to the United States. Overall U.S.-bound student mobility has seen an almost 10 percent increase over the past five years, with more focus on undergraduate degrees. Italian students are very interested in health sciences and business. Italy is the second most popular destination globally among U.S. students studying abroad.

Montenegro: A new EducationUSA advising center opened in Montenegro in March, 2015 at the American Corner in Podgorica. EducationUSA hopes to host a fair in Montenegro in 2016 to introduce U.S. higher education representatives to students in Montenegro.

Portugal: A longitudinal look at *Open Doors* data over the past 10 years shows a 29 percent increase in student

Europe and Eurasia

mobility despite a nine percent decline in Portugal's student-aged population. The United States has not fully tapped into Portuguese interest in studying abroad. The number of students from Portugal in U.S. undergraduate programs has been rising, and almost 30 percent of undergraduate students are studying at community colleges. English is Portugal's second most widely spoken language. A review of data from this past year indicates that over 65 percent of undergraduate students and 43 percent of graduate students are at public institutions and able to contribute significantly to the cost of their education.

Romania: EducationUSA in Romania experienced a refreshing of its center and services in 2014. Located at the Fulbright Commission in Bucharest, advisers developed new programming to reach out to talented Romanian students, engaged with educators at the secondary and tertiary levels to identify prospective students, hosted their first alumni fair, and established a new accessibility corner for students with disabilities, offering assistive technologies especially for visually impaired students. Romanian student mobility to the United States has declined over the past several years partly due to the affordability of higher education within Europe, but also due to a declining population of students between the ages of 15–24.

Russia: Student mobility increased for the third year in a row, and Russia maintains its place as the sixth highest sending country in Europe/Eurasia, and 26th globally. The United States is the second

most popular study abroad destination for Russian students, following Germany (UNESCO 2012). The number of Russians studying at all levels has grown in the past five years: undergraduate enrollment is up six percent while non-degree enrollment is up 22.9 percent, and Optional Practical Training has increased 23.1 percent since 2009–2010. The youth population continues to rebound in Russia with 0–14 year-olds up 10.2 percent from five years ago and up almost five percent from 10 years ago. In 2014, EducationUSA Russia consolidated all advising services into new country-wide online platforms, expanding access and reach. Social media engagement increased by 35 percent and subscriptions to the email newsletter increased 150 percent. The first round of awards for the new Russian Global Education Program scholarship program were announced in early 2015, and one third of the awardees received funding for U.S. graduate studies.

Spain: Spain is the fifth largest sending country in Europe and has experienced one of the biggest mobility shifts in Europe over the past five years with a nearly 35 percent increase in the number of students traveling to the United States for their tertiary education. Although Spaniards remain interested in U.S. study at the graduate level, most of this growth occurred at the undergraduate level, meaning more Spaniards than ever before are studying in the United States and starting at an earlier age. The EducationUSA center reached nearly 8,000 contacts in the 2013–2014 academic year and reports that more than 60 percent of its outreach contacts are

interested in undergraduate education. In an effort to service this growing market, EducationUSA launched a Competitive College Club and a series of monthly group advising sessions at the American Space Madrid. In 2015, these groups will merge to form the EducationUSA University Club. About 15 percent of students seen by the EducationUSA center are interested in summer study or ESL. Fees for undergraduate education in Spain in the public system are nominal, but not free. Private universities cost around \$15,000 per year. The ratio of Spaniards enrolled in public and private institutions in the United States is nearly half and half, demonstrating that a significant proportion of these students are able to fund, at least partially, a U.S. education. At the graduate level, in addition to Fulbright, three or four other foundations provide ample funding for U.S. graduate studies and research.

Ukraine: The recent revolution in Ukraine sparked incredible change in 2014, not the least of which is the emergence of a Western-looking Ukrainian government. President Poroshenko appointed many English-speaking and foreign-educated ministers to his cabinet. A new reform-oriented Ministry of Education, headed by Fulbright alumnus Serhiy Kvit, is taking on the task of overhauling the Ukrainian educational system to align it with European and U.S. standards at all levels. Projects include introducing mandatory English instruction in schools and credit-based college curricula to facilitate university linkages with Western countries. After a one-year hiatus, Peace Corps is returning to Ukraine with an

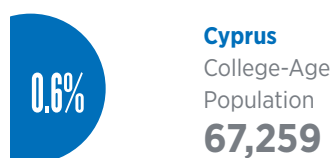
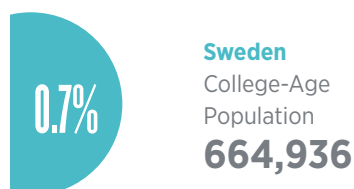
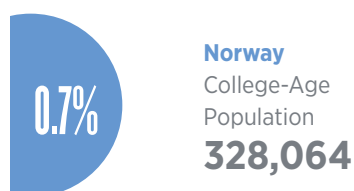
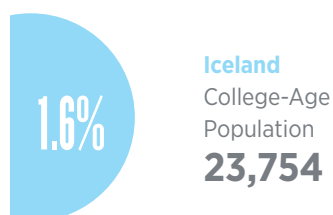
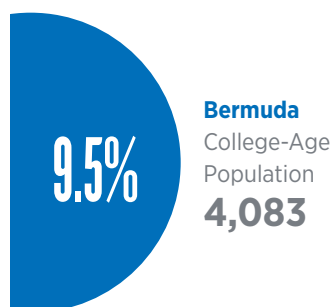
Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students (Five-Year Trend)

Country	2009/10	2013/14	%Change
Norway	1,467	2,304	57.1%
Kosovo	88	112	27.3%
Denmark	989	1,470	48.6%
Spain	3,971	5,350	34.7%
Sweden	3,116	4,369	40.2%

57.1%

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

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



Source: UNESCO Institute of Statistics; Indicator: 2013 Population of the official age for tertiary education, both sexes

emphasis on English-language education. Supported by Fulbright English Teaching Assistants (ETAs), high-quality English instruction is increasing even in the small towns and villages of Ukraine.

A thirty percent decline in the college-age population over the past decade has driven the 20 percent decrease in Ukrainian student mobility to the United States. The 0-14 year-old demographic is slowly regaining ground, and there is increased interest in undergraduate study in the United States. Forty-two percent of Ukrainians studying in the United States are undergraduates, up from 37 percent five years ago, and more than one third of them are studying at community colleges.

United Kingdom: In the UK, interest in U.S. study has increased dramatically in recent years. During the 2013-2014 academic year, 10,191 British students pursued study in the United States, an approximate eight percent rise from the previous year and the largest year-to-year increase in over a decade. There has been a 21 percent surge in British students pursuing U.S. study over the past 10 years. Additionally, there was an 11 percent increase in the number of UK undergraduate students in the United States between 2012-2013 and 2013-2014. These students applied in autumn 2012, just as the first cohort of university students were affected by increased UK university fees. These figures, combined with almost 4,700 attendees at the USA College Day fair last autumn, make it clear that British students are looking to the United States as an education alternative.

Current six-form students may also be inspired to cross the Atlantic thanks to the recent success of the Sutton Trust U.S. Programme. This program, created in 2012 and aimed at academically talented state school students interested in U.S. higher education, has garnered national and international press attention since its inception. The aim of the UK-funded program is to encourage academically talented, low- and middle-income British students to study at U.S. universities.

Eighty-two students from across the UK are studying in the United States and receiving over \$18 million in financial aid after participating in this program. Another 38 students were accepted in

autumn 2014's early admissions round and they have been offered approximately \$8.5 million in financial aid. Of the 38 accepted students, about two-thirds of participants are from households that earn less than \$27,500 a year, and about 70 percent will be the first in their family to go to university. The program is delivered in partnership between the U.S.-U.K. Fulbright Commission and the Sutton Trust. For more information, see <http://goo.gl/1wAfFa>.

What to Expect in the Next Three to Five Years

- The Erasmus+ program of the European Commission provides EU students opportunities to participate in short-term programs outside the EU. In the past, the program only supported intra-European mobility. The newest incarnation aims to involve two million students in higher education over the next seven years. U.S. and EU universities that have signed inter-institutional agreements can send and receive supported students, doctoral candidates, and staff for up to 12 months. While this initiative provides opportunities, it may also increase competition for EU students. In addition to the Erasmus+ grants for short-term studies in other European countries, European students can access student loans for master's degrees in other European countries at better-than-market interest rates and repayment will commence two years after graduation.
- Starting in academic year 2015-2016, the Dutch student grant system will be transformed into a loan system. Dutch

Regional Student Totals by Top Five Countries of Origin

Country	2013/14	% Change 2012/13
Turkey	10,821	-4.1%
United Kingdom	10,191	7.6%
Germany	10,160	3.5%
France	8,302	0.1%
Spain	5,350	6.3%

Europe and Eurasia

students will need to spend more on their education although low-interest student loans will be introduced. This should increase Dutch students' interest in pursuing degrees abroad, and the EducationUSA adviser has noticed an increased interest in U.S. higher education from Dutch students and their parents for this reason. *Open Doors* shows a promising 12.2 percent increase in degree-seeking undergraduate students in 2013–2014.

- The United States is the third most popular study abroad destination for Polish students, following the UK and France. According to the *2014 Open Doors report*, student mobility from Poland to the United States dropped by four percent over the past year. This is attributed to limited financing options at U.S. institutions, especially at the undergraduate level, more affordable study options in EU countries, and the demographic changes taking place in Poland. However, with the increase of tuition at UK institutions, it is expected that more Polish students will be interested in U.S. study in the coming years. The EducationUSA advising network has also expanded dramatically and includes advisers at the U.S. Embassy and Consulate, the Polish Fulbright Commission, and four American Corners in regional university cities.

- Demographics continue to be a primary factor affecting student mobility from Eurasia. The good news is that, for most countries of Eurasia, the number of students in the United States has decreased at a slower rate than the decrease of the college age population (15–24 year olds). Overall, mobility from Eurasia is down less than three percent from five years ago, while the college age population has decreased 20.4 percent since 2009. Compared to 10 years ago, the college age population has decreased 27.8 percent while Eurasian students studying in the United States have decreased by only 15.8 percent. Eurasians studying at the undergraduate level increased over two percent from the previous year with three percent more Eurasians enrolled in community colleges compared to five years ago. This uptick in undergraduate enrollment correlates with the steady increase of 0–14 year olds in the region, up five percent since 2009. Over the next decade, expect a growing college-age population and increasing undergraduate mobility to the United States.

Foreign Government and Private Funding
Governments in 18 European and Eurasian countries offer scholarship programs for their citizens to study abroad: Austria, Azerbaijan, Cyprus, Czech Republic, Estonia, France, Georgia, Macedonia,

- Netherlands, Norway, Romania, Russia, Slovak Republic, Slovenia, Sweden, Switzerland, Turkey, and Ukraine.
- The Dutch government announced a new national scholarship program for approximately 750 outbound Dutch students and 750 inbound international students beginning in academic year 2015–2016. Dutch students can apply for a grant of approximately \$1,300 to spend part of their Dutch degree at a university outside Europe. International students seeking a degree program in the Netherlands may qualify for a grant of around \$5,500.
 - In order to remain competitive on the global market and attract a share of the world's globally mobile students, European countries such as Germany, Finland, and Norway have changed or reaffirmed their policies to not charge international students tuition.
 - The Norwegian government announced that beginning in academic year 2015–16 it will extend its generous student funding scheme, *Lanekassen*, to also include the freshman year of a U.S. undergraduate degree. Norwegian citizens with a high-school diploma are eligible to receive approximately \$36,000 in loans and stipends each year. This important change will likely further increase Norwegian student mobility

EducationUSA Regional Reach

2014 EducationUSA in Europe and Eurasia made **1,164,295** contacts

Centers	Outreach	Virtual*
Contacts made through Advising Centers..... 260,030 Advising center-based contacts258,498 U.S. institution representative visits 1,532	Contacts made through Outreach Activities..... 390,643 Education fairs..... 281,113 American Corners/ Centers.....11,218 Local Universities/ Secondary Schools 43,666 Other fairs/conferences/ seminars 45,916 Host government events540 Embassy/consulate events.....3,095 Public locations 2,117 Other activities 2,978	Contacts made through Virtual Platforms.....513,622 Social Media Platforms.....512,408 Webinars, DVCs1,214

* Includes social network page likes, profile friends, or group members; video views; Skype contacts; blog and mini-blog followers; digital video conference participants; and EdUSA webinar participants.

to the United States, which was up 10 percent last year.

- The United States is the number one global destination for Swedish students, and the United States has enjoyed a 41 percent growth in Swedish students over the past five years. Two-thirds of Swedish students in the United States are at the undergraduate level, and community colleges are popular. This steady growth should increase with the new and more flexible CSN (the Swedish Government authority in charge of financial aid for studies) rules. As of July 1, 2015, Swedish students may take additional loans to cover higher tuition expenses and higher living costs in foreign countries, and U.S. English language programs and distance education programs can be covered. To receive student aid for countries outside the EU, Swedish students must study full-time and for at least 13 weeks.

- The Ministry of Education and Science in Macedonia awards scholarships for academic studies to students accepted to either one of the top-100 ranked universities or the top 200-ranked universities in the field of technical sciences as listed in the latest Academic Ranking of World Universities (ARWU) published by the Center for World-class Universities in Shanghai Jiao Tong University.

- Several programs in Russia award scholarships for study abroad including the new Global Education Program, which funds graduate studies in high-tech engineering, public administration, education administration, and social services fields (particularly public health and health administration). More information is available on the EducationUSA Russia website: <http://goo.gl/4VfrZl>.

- Slovenia offers various government scholarships for study abroad. The highest among these is the Ad Futura scholarship. Selected students can receive up to \$35,000 annually for the duration of their program. Learn more at www.sklad-kadri.si.

- Last year USAID launched the Transformational Leadership Program in Kosovo. This program is a special U.S. government initiative for Kosovo

that will support a minimum of 185 full scholarships for U.S. master's degree programs and 160 professional certificate programs over the next five years.

More than 80 foundations provide scholarships for citizens of specific European and Eurasian countries to study abroad:

- **Armenia:** More than 15 private foundations provide scholarships for Armenians to study in the United States; for more information, visit <http://goo.gl/aVslhz>.
- **Baltic States:** Working through the EducationUSA advising centers in Estonia, Latvia, and Lithuania, the Baltic-American Freedom Foundation offers \$25,000 scholarships to students from those countries to pursue graduate study in the United States; for more information, visit <http://goo.gl/upHfIZ>.

- **Croatia:** Several Croatian foundations award competitive scholarships for Croatian graduate students at targeted U.S. universities, such as Harvard University and Georgetown University, among others. For more information, contact EducationUSA Zagreb.

- **Ukraine:** WorldWideStudies grants cover university fees, study materials, and health insurance (60 percent of expenses, up to \$50,000) for master's programs. Priority fields include agriculture, environmental studies/ecology, law and public administration, alternative energy, and aerospace engineering, but other fields are eligible for consideration.

For a complete list of European and Eurasian government and private-funded scholarship programs, visit the REAC portals on the higher education section of the EducationUSA website at educationusa.state.gov.

EducationUSA Study Abroad

Top Five Receiving Countries in the Region

Destination	2012/13	% Change
United Kingdom	36,210	4.5%
Italy	29,848	0.7%
Spain	26,281	-0.8%
France	17,210	0.2%
Germany	9,544	1.9%

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

Country Name	2008/09	2012/13	% Change
Turkey	1,261	2,037	61.5%
Denmark	2,244	3,302	47.1%
Malta	95	126	32.6%
Romania	219	287	31.1%
Ukraine	84	102	21.4%

Europe and Eurasia

Virtual and Social Media Usage

- **Albania:** As a result of Facebook promotion, which began in December 2014, the number of students and parents that follow the EducationUSA Facebook page in Albania has risen to over 10,000. This has contributed to the large increase in the number of students who are regularly working with EducationUSA advisers. Over 150 students regularly attend advising sessions. The EducationUSA center in Tirana opened just three years ago and interest in U.S. study is continuing to grow. While students do seek financial aid, Albanian parents are able to contribute financially to their children's education. Over 54 percent of undergraduate and 55 percent of graduate students are studying at public universities in the United States.
- **Bulgaria:** The EducationUSA program in Bulgaria has a results-based, intensive, virtual-advising program that provides all high-school students interested in continuing their education in the United States with an improved chance of getting into their top choice schools. The program is administered by the Bulgarian Fulbright Commission's advising center in partnership with the English language high schools in Bulgaria, Fulbright English Teaching Assistants (ETAs), Fulbright alumni, the U.S. Embassy in Bulgaria, the American Corners/Shelves, CorPlus, the YES Program, and Bulgarian current students in the United States. The program goals are threefold: to increase and improve the use of virtual outreach to encourage U.S. study; to provide accurate, up-to-date, and comprehensive information about U.S. study; and to assist students in their college preparation. In 2013–2014, a total of 868 high-school students from 34 high schools in 27 Bulgarian towns participated in the EducationUSA virtual advising program. 17 of the 128 participants in the 12th grade were accepted to U.S. universities and colleges with scholarships totaling \$1,990,480.
- **France** has increased its virtual advising program significantly in the past year. The center offers most of its information sessions for students and many thematic advising sessions on topics such as school selection, application preparation, and essay writing through

webinars which reach students beyond Paris. France is the fourth largest sending country in Europe, behind Turkey, the United Kingdom, and Germany, and ranked 15th globally. France is also the fourth leading destination country for U.S. students studying abroad.

- In **Turkey**, in addition to in-center services, the EducationUSA centers at the Turkish Fulbright Commission in Ankara and Istanbul reach students across the country through an innovative virtual advising platform. Advisers provide online advising sessions three times a week during scheduled online advising hours and through webinars. Since May 2013, EducationUSA centers in Turkey have reached approximately 1,000 students in online advising sessions.
- The Fulbright **Belgium** YouTube channel was created in 2010 and currently has over 700,000 views and 1,400 subscribers. Students can find videos with tips on how to pursue U.S. higher education, how to apply to universities and internships in the United States, and how to obtain a scholarship through Fulbright. The advisers interview a variety of students returning from the United States so they can share their experiences and tips. They record videos with students, Fulbright grantees, interns, and participants in exchange programs. In addition, they also interview U.S. university representatives when they come to Belgium for recruitment, primarily to share tips about the college application process.
- In 2014, **Italy** continued its educational webinars campaign as one of the most cost-effective tools to reach a large number of Italian students. Last year, EducationUSA advisers offered monthly webinars covering topics like the application process, financial aid opportunities, and standardized tests. Advisers also give regular virtual pre-departure orientations to Italian students. On a quarterly basis, the two centers in Rome and Naples collaborate with the Public Affairs Section of the U.S. Embassy to offer a joint web chat to promote U.S. study opportunities. EducationUSA Italy also started an effective outreach campaign in 2014 aimed at promoting the U.S.

higher education system among the community of Italian students with disabilities.

Successful Recruiting Strategies

- Connect with EducationUSA centers, particularly in southern Europe, if you are interested in attracting student athletes to your campuses. Advising centers in the region are knowledgeable about advising student athletes and some centers offer cohort-advising programs specifically for them.
- Promote English language programs especially in Albania, Bulgaria, Hungary, and Turkey.
- Highlight summer programs, short-term programs, and certificate programs in the region. The number of students seeking non-degree programs in Europe and Eurasia is increasing. Just over 18 percent of U.S.-bound students are in short-term programs.
- The global economic crisis is pushing more students to the United States each year. Skill-building, internship programs, and job applicability are big draws for European and Eurasian students. Focus on providing information on internships and career development and maintaining strong OPT placement programs to attract prospective students from this region.
- Your alumni are an important resource to help promote your institution. Cultivate relationships with current international students and international alumni. Bring them to EducationUSA fairs or ask them to work at your institution's table if you can't travel there yourself. If your American students are headed abroad, make sure they bring materials and are ready to help promote your campus while on exchange programs.
- Offer webinars or other virtual discussion sessions with students who want to learn more about the United States and U.S. higher education. Most EducationUSA advising centers look for presenters, and this is a great way for institutions to support prospective international students.
- Community colleges should highlight the cost-saving dimensions of 2+2 articulation agreements, especially in Eurasia and southern Europe.

- Leverage scholarships—even partial ones. Helping to reduce the cost of attendance even a little can sometimes make a big impact.
- Set up direct linkage and exchange agreements with European higher education institutions. Erasmus+ provides funding to international students who wish to study in the United States through an articulated partnership agreement for credit mobility. The Erasmus+ program also provides opportunities for the establishment of joint and dual degrees and U.S. higher education institutions can be part of these consortia. This used to be known as Erasmus Mundus but is now part of the Erasmus+ program.
- Understand the cultural and procedural differences of university admissions in Europe. The college application process can be less cumbersome in Europe than in the United States and, in some cases, all that is needed is one exam result for a student to apply and gain admission. Therefore, students tend to leave their applications to the last minute. Prepare for last-minute questions and rushed deadlines. U.S. institutions can help overcome this by clearly stating their deadlines and working with potential applicants to make sure they are on track.
- At the graduate level, the possibility of getting a research or teaching assistantship is a major factor in the decision to apply to and ultimately attend a U.S. university as opportunities are sought to develop skills that can help graduates stand out in the job market.
- Parents, other family members, teachers, and others often need information provided in their native language. Work with the EducationUSA advisers to determine which translated materials are most needed and effective in their countries.
- It is useful to visit countries which are off the beaten path. Countries that may appear to have a student market too small to focus on are often looking for opportunities to liaise with the U.S. higher education community and Malta is a good example. There are very academically talented students looking

for opportunities outside their country for specialized fields, especially in the arts, because these fields are not offered at home.

- REACs are happy to help institutions strategize about the best countries to focus on. Contact them to discuss your specific recruiting goals. They can share in-depth information about the region.

Regional EducationUSA Events / Fairs and Conferences

- **EducationUSA Pavilion at EAIE, Sept. 15-18, 2015, Glasgow, Scotland:** The

European Association for International Education (EAIE) conference brought together more than 5,000 higher education professionals from over 90 countries in Prague, Czech Republic in September 2014. The EducationUSA Pavilion led to increases in visibility, student mobility, and income for the 14 U.S. exhibitors present at the booth. One university reported that an estimated value of \$250,000 per year would originate from partnership agreements as a direct result of its participation in the U.S. Pavilion. Accredited U.S. colleges and universities



Europe and Eurasia

seeking to raise their profile and meet partner institutions from other world regions at the largest international education conference in Europe are welcome to join the EducationUSA Pavilion at the 2015 EAIE conference. Learn more at www.educationusa.info/conferences or <http://goo.gl/cjgmTx>

- **The EducationUSA advising center at the U.S.-U.K. Fulbright Commission** continues to run a highly successful annual USA College Day. In 2014, there were record levels of attendance with over 4,700 visitors and 180 exhibitors. During the last five years, USA College Day has almost doubled in the number of universities attending, up from 92 universities in 2009. The 2015 USA College Day fair is September 25 and 26, 2015; e-mail collegeday@fulbright.org for registration info.
- **EducationUSA/CIS College Fairs** in Paris (9/27), Athens (10/5), and Nicosia (10/6).
- **The EducationUSA offices at the Fulbright Commissions in Belgium and the Netherlands** will hold their annual College Night fairs respectively on September 28, 2015 and October 1, 2015. See www.fulbright.be and www.ivycircle.nl to register.
- Thanks to the success and popularity of the first ever **EducationUSA spring fairs in Hamburg and Heidelberg, Germany** in April 2015, the fairs will be repeated in the spring of 2016 in additional German cities.
- **EducationUSA** is teaming up with the U.S. Department of Commerce to host recruiting events in Spain, Portugal, France, and the United Kingdom in September 2015.
- **The Sixth Annual Eurasia Tour and Second Annual Baltics Tour** include fairs in 11 cities and eight countries and are the only U.S. Higher Education fairs in Eurasia and the Baltics. The Eurasia Tour is from October 23–November 7, 2015 and the Baltics Tour is from November 9–13, 2015. For more information visit: bit.ly/1571aAq
- **EducationUSA Europe and Eurasia will host its first LL.M. Tour** in November 2015 with stops likely in Amsterdam,

Brussels, Kyiv, Oslo, Paris, Vienna, and Zurich. Look for more information in the EducationUSA Monthly Newsletter.

- **The 11th Annual Higher Education & Scholarships Fair**, organized by EducationUSA Croatia, will be held in two major Croatian university cities: the capital Zagreb (October 13, 2015) and the Adriatic coastal city Rijeka (October 15, 2015). The Fair will highlight study opportunities and student financial aid available in Croatia and abroad. In 2014, 11,000 people visited the Fairs over two days, and 70 institutions from 17 countries presented their study and scholarship programs. For more information on becoming an exhibitor or participating virtually, view a short video on the 2014 Fair (<http://vimeo.com/channels/425130>), visit the Fair webpage, and contact EducationUSA Croatia.

Spring Events 2016

- The third annual Portugal and Spain Fairs will take place in Lisbon and Madrid, with a plan to expand to Barcelona in 2016. These fairs generally take place in March.
- The third annual EducationUSA Southern Europe Tour, including fairs in Slovenia, Croatia, Bosnia, Serbia, and Macedonia is tentatively scheduled to take place in April 2016.

Subscribe to the EducationUSA monthly newsletter to receive the latest news on recruiting events planned in Europe and Eurasia and globally, as well as information about emerging trends.

Best Times of Year to Interact with Students

- September–November, March–May

U.S. Study Abroad in the Region

Europe remains the top destination for U.S. study abroad students and, in 2012–2013, Europe attracted 53.3 percent of all U.S. students studying abroad for credit. Of the top 10 receiving countries of U.S. students, six are in Europe. Growth in study abroad outpaced the global average (two percent) in 27 European and Eurasian countries, including traditional destinations such as the UK, Ireland, Denmark, the Netherlands, and the Czech Republic. The UK remains the top study abroad destination for U.S. students with

36,210 hosted there in 2012–2013. Steep growth rates of more than 50 percent over the previous year were seen in non-traditional destinations, including Belarus, Azerbaijan, Macedonia, Georgia, Serbia, and Lithuania.

European universities are increasingly looking to attract U.S. students to their degree programs and offer over 4,000 English language master's degrees. In the Nordic countries, 61 percent of higher education institutions in the five Nordic countries offer bachelor's or master's programs taught entirely in English, up from 32 percent in 2007. The latest data from UNESCO's Institute for Statistics shows that 58,000 U.S. students are enrolled in degree programs abroad with over half of them studying in Europe.

Medical schools in several Central and Eastern European countries are making concerted efforts to attract international students. They are attractive for international students since they offer education in English for a reasonable price. In the Slovak Republic, for example, more than 2,000 students from 40 countries study medicine. Six Polish medical universities are registered with the U.S. Department of Education's Foreign School Direct Loan Setup Program, and they report that this has greatly facilitated the flow of U.S. students to their campuses. ★

Middle East and North Africa (MENA)

Regional EducationUSA Profile

Algeria, Bahrain, Egypt, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Qatar, Saudi Arabia, Syria, Tunisia, United Arab Emirates, West Bank and Gaza, Yemen

EducationUSA advising centers in the **Middle East and North Africa (MENA)** are located in U.S. Embassies and Consulates, AMIDEAST offices, and Fulbright Commissions. EducationUSA advising activities in Iran, Syria, and Yemen are conducted virtually.

EducationUSA advisers are well-versed in local knowledge of their respective countries and regions. Each center maximizes impact for students, U.S. institutions of higher education, and governmental partners with tailored programs and activities. EducationUSA advisers provide guidance to government scholarship offices in Iraq, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates. Their efforts include connecting these offices with potential U.S. higher education institution partners and assisting scholarship students in finding appropriate study opportunities in the United States.

EducationUSA advisers in the MENA region conduct their work in an environment of frequent change and opportunity. An ever-larger number of students utilize the EducationUSA network for help, and the region continues to show the largest increase in students studying in the United States from year to year. The *Open Doors* report indicates 20 percent more students from the region studying in the United States during academic year 2013–2014 than in 2012–2013. The previous year saw a 24 percent increase. The region boasts many competitive

college clubs (CCCs) where advisers meet bi-monthly with academically serious high-school students to prepare them for study on U.S. campuses and to guide them through the college application process. Advisers work with students to find the best institutional fit—academically, socially, and financially. CCC activities include community service projects, book clubs, poetry recitals, spelling bees, speaker engagements, test preparation, and information sessions on the application process. All CCCs foster student leadership skills. More than 100 students from the MENA region have successfully completed a CCC program and are studying in the United States or heading there in fall 2015.

The Opportunity Funds program supports talented, economically disadvantaged undergraduate and graduate students by providing the upfront costs of applying to U.S. institutions; costs such as testing and application fees. In the MENA region, EducationUSA Egypt and EducationUSA Lebanon work with Opportunity Funds students, and the program may expand to other countries.

College counselor groups in the region convene high-school counselors to promote best practices in application processes and to cover topics such as applying for student visas, writing school profiles, application timelines, and how to help students select the institutions that best meet their needs. The EducationUSA network provides college counselor groups with mini libraries of college-advising resources,

28

EducationUSA
Advising Centers
in the Region

19 Comprehensive
5 Standard
4 Reference



Middle East and North Africa

as well. Advisers' cooperation with these counselor groups helps to ensure that visiting U.S. admissions officers have productive trips and can interact with a broad range of students.

Regional Overview

The United States remains the top higher education destination for students from the Middle East and North Africa, as reflected in the 20 percent increase in the number of Middle Eastern students and the eight percent increase in North African students enrolled at U.S. colleges and universities in 2013–2014 (*Open Doors*, 2014). In nearly all MENA countries, the number of students studying in the United States is steadily increasing, with notable increases coming from Gulf countries whose governments support and, in some cases, are expanding generous scholarship programs to send their students abroad to pursue higher education.

According to the Brookings Institution, more than 30 percent of the population of the Middle East is between the ages of 15 and 29 (<http://goo.gl/tp82Wa>). Student demand for postsecondary education far exceeds the capacity of local universities in some countries. Additionally, the uneven quality of the higher education systems in the region leaves many students without the necessary skills to enter a competitive labor market.

Countries such as Qatar, Saudi Arabia, Tunisia, and the United Arab Emirates remain interested in exploring the benefits of community colleges and have included two-year institutions on their lists of approved institutions for scholarship

recipients. 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.

Universities in the Gulf are interested in hosting American-educated professors to develop the capacity of their own universities and express eagerness to engage with U.S. faculty for collaborative research and teaching opportunities. While students in the Gulf region have access to universities in their home countries, they have a strong interest in pursuing education in the United States, particularly at the graduate level.

Recent Trends

- Many universities in the region seek linkages with U.S. institutions. The EducationUSA REAC and advisers provide local institutions with information on how to identify appropriate U.S. partners and tips on how to develop effective, reciprocal student and scholar exchange agreements. A significant number of MENA governmental officials and administrators of higher education institutions joined the inaugural series of EducationUSA Leadership Institutes that took place in February 2015, further developing their capacity to establish effective partnerships.
- Several governments are renewing and/or expanding their scholarship programs to send qualified students to the United States to study. The Kuwaiti and Omani governments have increased the number of scholarships available for qualified

students, resulting in larger numbers of students studying in the United States in academic year 2014–2015: a 43 percent increase up to 7,288 Kuwaiti students and a 53 percent increase up to 1,504 Omani students.

- Due to ongoing political and economic uncertainties, the governments of Iraq and Libya have curtailed and, in some instances, frozen their scholarship programs. This affects students already in the United States who may need assistance with tuition and living expenses while their government sponsors work through financial and administrative challenges.
- Many countries in the region want their workforce 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.
- MENA students continue to study in destinations other than the United States—in Canada due to the perception that study there offers a quick track to citizenship, and in the United Kingdom because of geographic proximity. For students from North Africa, France is an attractive alternative due to both geographic proximity and linguistic affinity.

Countries in the Spotlight

Kuwait: The government of Kuwait increased the number of scholarships awarded to undergraduate students for U.S. study. Scholarships are announced each July.

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

Country	2009/10	2013/14	%Change
Oman	286	1,504	425.9%
Iraq	423	1,491	252.5%
Saudia Arabia	15,810	53,919	241.0%
Kuwait	2,442	7,288	198.4%
Iran	4,731	10,194	115.5%

425.9%

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



Oman: The government of Oman recently expanded the number of scholarships offered to qualified Omani students. Open Doors data reveal that Oman experienced one of the largest jumps in students studying in the United States: from 980 in 2012-2013 to 1,504 in 2013-2014.

Saudi Arabia: Saudi Arabia, the largest sender of students from the region, saw

a 21 percent increase in the number of students, many of whom benefit from the King Abdullah Scholarship Program (KASP), now approaching its eleventh year. With the ascension of King Salman, the government of Saudi Arabia recommitted funding to the King Abdullah Scholarship Program (KASP) for the next several years, reflecting the country's willingness to invest heavily in providing

its students with a U.S. education at both the undergraduate and graduate levels.

What to Expect in the Next Three to Five Years

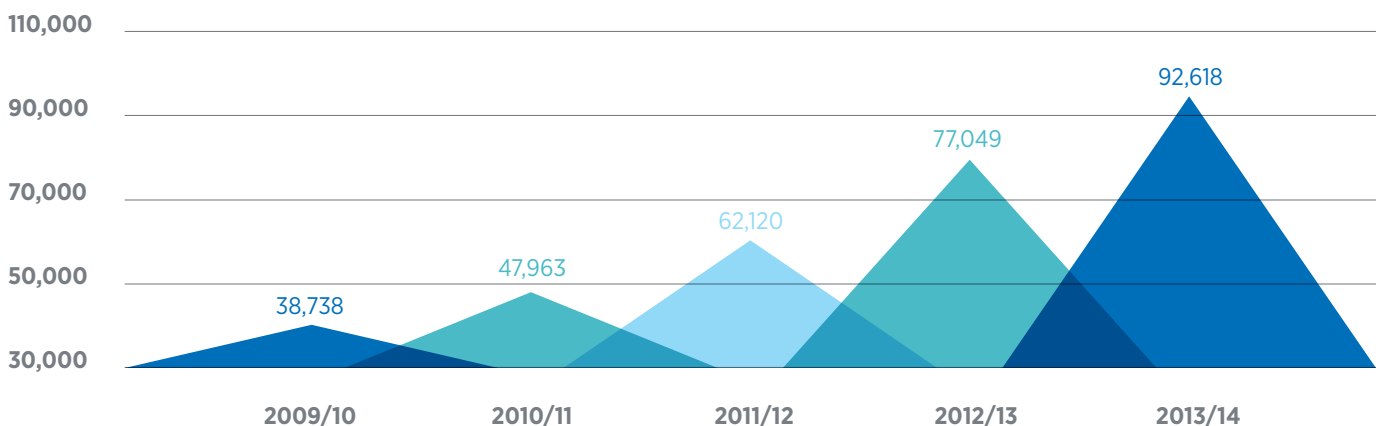
- American institutions of higher education can expect to see sustained interest from countries offering government scholarships with an emphasis on graduate education and professional master's programs.
- MENA governments look to the United States for educational expertise and are eager to send students abroad to gain the knowledge and skills they need to contribute to higher education reform at home. American institutions should expect more calls for partnerships, linkages, and U.S. faculty visits to the region, as local institutions see their U.S. counterparts as models. Many universities in the region have funding to send faculty to the United States for training in teaching methods, advanced research, and administration.
- U.S. higher education institutions should expect to see a greater need for financial support for qualified Syrian students who continue to struggle under the burden of violence and instability in their country. Many of these students have fled Syria and will be applying from other locations throughout the world.

Foreign Government and Private Funding

- Bahrain, Egypt, Iraq, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates currently fund government

Student Mobility (Five-Year Trend)

Source: Institute of International Education, funded by a grant from the U.S. Department of State, *Open Doors Report on International Educational Exchange*



Middle East and North Africa

scholarship programs. Among the chief barriers to recruiting funded students is that many governments maintain exclusive lists of approved U.S. institutions and will only support study at these vetted colleges and universities. One strategy to raise awareness about U.S. institutions and increase the chances of inclusion on these lists is to visit the cultural missions of these countries in Washington, D.C. or 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 programs of study, as well as to express interest in hosting students from the region, explaining how each U.S. institution is prepared to be effective and qualified hosts for their international students.

- Many governments sponsor their own college and university fairs and appreciate the attendance of U.S. institutions. EducationUSA advisers can provide guidance on participating in these events and facilitate communication with ministries of higher education. Countries that regularly sponsor these events include Oman, Saudi Arabia, and the United Arab Emirates. U.S. institutions of higher education may also send faculty to EducationUSA-sponsored events where staff can arrange faculty-to-faculty dialogues and provide U.S. higher education representatives with a focused

approach toward collaborative research projects. Alumni of U.S. institutions are often welcome to attend and represent their alma maters as well.

- Many oil companies in the region and other private firms offer scholarships to their employees. These funds are available for current and future employees working in the science, technology, engineering, and mathematics (STEM) fields. SABIC and Saudi Aramco have programs for high-school students who are on track to become employees at these companies following university study in the United States.

Virtual and Social Media Usage

- According to Internet World Statistics (www.internetworldstats.com), there are 177 million internet users in the MENA region. Internet connectivity is generally sufficient both in homes and cyber cafés in large cities with few exceptions.
- The EducationUSA Iran adviser, based at the Institute of International Education in Washington, D.C., provides guidance to students virtually. The adviser also supplies information about the Iranian higher education system to the U.S. higher education community. In 2015, EducationUSA Iran is refreshing its website and virtual services to better enable it to reach a greater number of

students with accurate, comprehensive, and current information.

- The EducationUSA Syria adviser continues to work virtually, assisting Syrian students through Skype, email, and a blog designed to highlight Syrian students in the United States. In August 2014, she launched a virtual Competitive College Club for Syrian students seeking admission to undergraduate programs in the United States.
- Facebook is the most visited website in most of the region with more than 49 million users. YouTube is widely used by students to view university videos. Even in countries where the site is banned, students access it through proxy servers. This year, EducationUSA Saudi Arabia used YouTube to reach more than 4.5 million Saudi students and parents with a cartoon video series called *Amreeka 101* about studying in the United States. EducationUSA Iraq also launched a successful YouTube channel encouraging students to share their study abroad experiences.
- Given the value of face-to-face and verbal interaction, interactive platforms, such as EducationUSA newrow webinars, are promising opportunities to engage youth while also informing them about educational opportunities in the United States.

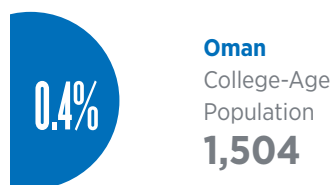
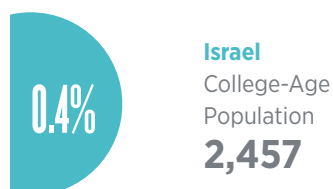
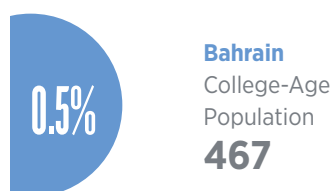
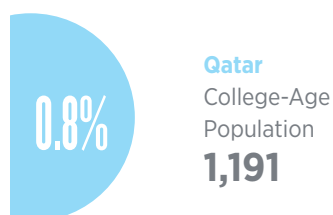
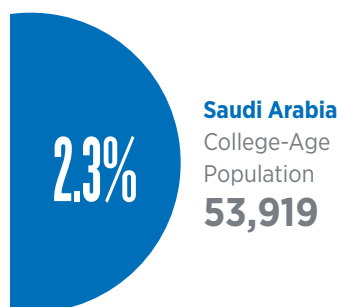
EducationUSA Regional Reach

2014 EducationUSA in North Africa and Middle East made **693,055** contacts

Centers	Outreach	Virtual*
Contacts made through Advising Centers..... 92,941 Advising center-based contacts89,346 U.S. institution representative visits3,595	Contacts made through Outreach Activities..... 444,822 Education fairs.....409,873 American Corners/ Centers.....749 Local Universities/ Secondary Schools12,958 Other fairs/conferences/ seminars11,511 Host government events4,336 Embassy/consulate events.....2,022 Public locations1,284 Other activities2,089	Contacts made through Virtual Platforms.....155,292 Social Media Platforms.....154,509 Webinars, DVCs783

* Includes social network page likes, profile friends, or group members; video views; Skype contacts; blog and mini-blog followers; digital video conference participants; and EdUSA webinar participants.

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



Source: UNESCO Institute of Statistics; Indicator: 2013 Population of the official age for tertiary education, both sexes

- Challenges to virtual and social media usage in the MENA region include power outages, which are common in some countries, connectivity issues, and internet restrictions. As a result, large files can be difficult for students to open. U.S. higher education institutions can send promotional videos and other large electronic files directly to EducationUSA advising centers where students can open and view them more easily.

Successful Recruiting Strategies

- Translate your website into Arabic, Persian, or Kurdish and record videos of your students from the Middle East and North Africa as a means to engage parents and students with limited English language skills. Provide more visual information about living on campus. Particularly at the undergraduate level, students want to see what living arrangements are like. Highlight institutional support and student services (academic, extracurricular, social) for those students who bring families and chaperones, as well as for those who travel alone. Conduct focus groups with new students to ask them about how to simplify the application and settling-in process.
- Keep family members in mind. They play an important role in students' decision making. Many graduate students will be in the United States with their families and prefer institutions that provide support for households.
- Leverage word of mouth as it is particularly important in the region. Cultivate relationships with current international students and international alumni and visit alumni when recruiting abroad. Alumni, many of whom have high-ranking positions in the public and private sectors, appreciate the opportunity to engage with admission officers from their alma maters.
- Engage current international "students on your campus, as they can provide insights and advice to prospective students from their home countries and regions during the recruitment and student orientation seasons.

Regional EducationUSA Events

The EducationUSA Middle East and North Africa 2015 Regional Forum will be held September 1-4, 2015 in Dubai, United Arab Emirates, and is the flagship event of the year in the region. This unique opportunity, complementing the EducationUSA Forum in Washington D.C., will offer in-depth networking, mutual learning, and training with advisers from across this broad and dynamic region. The Regional Forum will provide opportunities for U.S. higher education professionals to hear from expert advisers about student mobility trends and recruitment opportunities in the Middle East and North Africa, as well as opportunities to update advisers on current topics in international student recruitment, admissions, and services. There will also be scheduled time to network with U.S. Embassy/Consulate personnel, UAE Ministry of Education officials, and university administrators, as well as an event to reach prospective students.

Fairs and Conferences

In addition to the many in-person student recruitment opportunities offered through participation in EducationUSA fairs and conferences, representatives of U.S. institutions can build on these events by receiving a country briefing from EducationUSA advisers, meeting with U.S. embassy public affairs and consular staff (subject to scheduling availability), making a presentation at an EducationUSA advising center, and/or visiting local high schools or colleges. Contact the EducationUSA staff organizing the event

Regional Student Totals by Top Five Countries of Origin

Country	2013/14	% Change 2012/13
Saudi Arabia	53,919	21.0%
Iran	10,194	16.6%
Kuwait	7,288	42.5%
Egypt	2,832	8.6%
United Arab Emirates	2,784	23.4%

Middle East and North Africa

to explore options for maximizing the impact of your participation. Examples of upcoming fairs and exhibitions with EducationUSA participation include:

EducationUSA Pavilion at the International Exhibition and Conference on Higher Education (IECHE):
April 15–17, 2016 in Riyadh, Saudi Arabia—participate in the EducationUSA Pavilion at IECH, the largest government-sponsored education expo in the Gulf.

EducationUSA Pavilion at NAJAH:
October 27–28, 2015 in Abu Dhabi, United Arab Emirates—participate in the EducationUSA Pavilion at NAJAH, the official government-sponsored educational expo.

GHEDEX: April 2016, join EducationUSA in our special section at GHEDEX, Oman’s largest higher education expo.

Center Events
All EducationUSA centers in the region

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

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

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 rest of the world. The region hosted only two percent of all U.S. study abroad students in academic year 2012–2013. Israel, Morocco and Jordan are the top three hosting countries. While EducationUSA advising centers in the region do not host study abroad programs, they offer internship opportunities and are eager to work with U.S. student volunteers. U.S. study abroad offices can inform U.S. students about potential internship opportunities with EducationUSA offices in Alexandria, Beirut, Cairo, Rabat, Ramallah, Tel Aviv, and Tunis. ★

Best Times of Year to Interact with Students

Best timesOctober–December, February, April–May

Worst timesJune–October (summer, Ramadan/Eid breaks)

Exam periods and religious holidays can vary since not all countries (and school systems within countries) are on the same academic timetable. Advisers will work with you to accommodate your needs and plans throughout the year.

EducationUSA Study Abroad

Top Five Receiving Countries in the Region

Destination	2012/13	% Change
Israel	2,798	-12%
Morocco	1,182	24%
Jordan	935	-4%
United Arab Emirates	696	5%
Egypt	486	-31%

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

Country Name	2008/09	2012/13	% Change
Palestinian Territories	8	35	529.2%
Jordan	483	935	100.8%
Israel	1,958	2,798	91.6%
Morocco	865	1,182	37.3%
Qatar	70	88	33.1%

South and Central Asia

Regional EducationUSA Profile

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

Advising centers in **South and Central Asia (SCA)** are located in U.S. Embassies and Consulates, Fulbright commissions, American Councils/ACCELS offices, and other non-profit organization offices. EducationUSA's credibility in South Asia is closely linked to the U.S. diplomatic mission and the reputation of the host institutions. There are 64 advisers in SCA with several countries hosting multiple advising centers. Advisers in the region function as mentors and local experts in U.S. higher education, providing advising sessions at their centers, connecting virtually with students, and participating in outreach activities. From January 2014 to December 2014, SCA advising centers engaged with over 269,000 contacts through in-center services and with 279,000 contacts through outreach activities.

EducationUSA advising centers in South Asia conduct outreach in close collaboration with Public Affairs and Consular sections of U.S. Embassies and Consulates. Representatives from U.S. higher education institutions (HEIs) assist these advising centers with webinars on specific topics related to U.S. higher education and the application process. In addition, in-person visits by U.S. university representatives allow EducationUSA to showcase institutions and facilitate personal interaction with students, parents, and local educational institutions.

The Opportunity Funds program supports talented, economically disadvantaged undergraduate and graduate students by providing the upfront costs of applying to U.S. institutions. EducationUSA advising centers in Bangladesh, India, Nepal, Pakistan, and Sri Lanka currently offer Opportunity Funds.

Regional Overview

The youth populations in South and Central Asia are the largest in the world and another facet of the region's growing cultural and geographic diversity. People-to-people ties and the international exchange of students continue to be of crucial importance in this region.

India and Nepal remain among the top 25 countries in the world sending students to the United States for higher education. Within the region, India ranks first, followed by Nepal, Pakistan, and Bangladesh.

The challenges facing the region remain the same year to year. The need for renewable energy and clean water is more urgent than ever before. The migration of rural populations to urban areas continues to accentuate the disparities between the rich and poor. Trained specialists in fields of sustainability, water management, law, engineering, and social services are required to meet the challenges of the region. U.S. higher education is well placed to make a positive impact in South and Central Asia, as HEIs offer programs that will prepare students to deal with these challenges. While recruiting in the region, U.S. higher education representatives should highlight the many reasons why U.S. programs provide the knowledge and skill sets essential to the region's future.

The internet is available in SCA with an average speed of 1.7 mbps. The region faces frequent electricity disruptions with some countries experiencing up to 16 hours without power daily in winter months. This impacts students' ability to access on-line applications, conduct research, take tests, and interact virtually.

30

EducationUSA
Advising Centers
in the Region

15 Comprehensive
8 Standard
7 Reference



South and Central Asia

Recent Trends

Over 14 percent of the total international student population in the United States originates from South and Central Asia. The 2013-2014 academic year saw a five percent increase to 127,301 students from the region studying in the United States. Notable increases came from India, Bangladesh, Pakistan, and Kazakhstan. India and Nepal are the top senders for undergraduate students, while India, Nepal, Bangladesh, and Pakistan send the highest number of graduate students.

Adding to the diversity of U.S. campuses, as of 2013-2014, there were 3,203 Central Asian students at U.S. institutions, an increase of just over one percent from the previous year. There has been a notable increase in mobility from Tajikistan and Turkmenistan along with slight increases from Uzbekistan and Kazakhstan.

- **Afghanistan:** The number of Afghan students in the United States was stable at 450 in 2013-2014. Each year, more Afghans avail themselves of educational opportunities at the local secondary level and learn about opportunities to study in the United States. The U.S. Embassy in Kabul has a strong EducationUSA program with extensive countrywide outreach conducted virtually. The Kabul Educational Advising Center, also an EducationUSA advising center, is building facilities in three Afghan cities to provide TOEFL, GRE, and GMAT testing for the first time in the country. Many USG and non-USG scholarships exist to help Afghan

students access U.S. higher education. EducationUSA in Kabul is compiling a database of these opportunities.

- **Kyrgyzstan:** Of the 41 percent of undergraduate Kyrgyz students in the United States, 40 percent are pursuing associate's degrees. The number is unlikely to change dramatically, although with a well-functioning EducationUSA center in place and support from the U.S. Embassy, it may increase. Several USG exchange programs are active in Kyrgyzstan, contributing to a four percent increase in non-degree programs. Lack of finances and English language skills make it challenging to apply to U.S. institutions, but familiarity with intensive English programs and community colleges is increasing. Large numbers of Kyrgyz students pursue higher education in Russia, Turkey, Germany, and Kazakhstan due to language affinity, affordability, proximity, and ease of access.
- **Sri Lanka:** Sri Lanka is experiencing economic growth after years of civil war. Sri Lanka's demand for higher education cannot be met by the limited higher education opportunities that exist locally. As a result, students pursue degree programs abroad. Decreased numbers on U.S. campuses are most likely due to Sri Lankan students turning more frequently to academic opportunities within the region. Study destinations in China, Malaysia, and Singapore especially attract students

with their low cost and proximity to Sri Lanka. Sri Lankans often choose Australia when considering higher studies because of its proximity, its shared historical colonial link, and its offer of citizenship upon completion of a degree program.

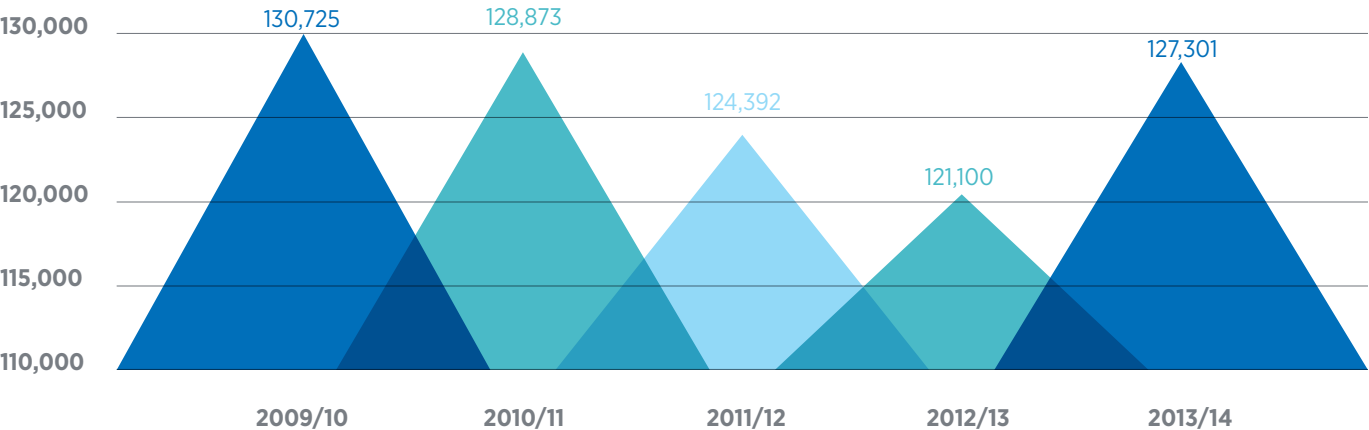
- **Uzbekistan:** In 2013, a presidential resolution was passed to advance English instruction in the education sector, which created a demand for English instructors. The competitive admission criteria and limited seats lead elite families to invest in U.S. education. Uzbekistan has a population of over 30 million with almost two thirds a youth population. Students continue to pursue higher education in Russia, other Central Asian countries, and Europe due to ease of access and affordability. Several USG exchange programs are active in the country.

Countries in the Spotlight

India: India has broken its three-year trend of declining numbers with an increase of six percent. The total number of students in U.S. higher education went from 96,784 in 2012-2013 up to 102,673 in 2013-2014. The number of Indian students in graduate programs increased to a total of 60 percent of all Indian students on U.S. campuses. Indian students in OPT programs make up 27 percent of the Indian international student population and approximately 12 percent of Indian students are in undergraduate programs. Of those, 10 percent are pursuing associate's degrees. The increase in the

Student Mobility (Five-Year Trend)

Source: Institute of International Education, funded by a grant from the U.S. Department of State, *Open Doors Report on International Educational Exchange*





2013–2014 numbers can be attributed to a stabilized Indian rupee and easily available bank loans for studying abroad. It can also be attributed to the stabilizing of the U.S. economy and job market. Students and their families are savvy, making decisions about higher education destinations after cautious scrutiny of local and international economic conditions. Families expect to have a return on investment through Optional Practical Training (OPT) programs.

The United States dominates the foreign education market in India. Indians firmly believe that the United States has the highest quality higher education system with the widest range of programs and the best research options. It is not a question of “why study in the United States?” but “how to study in the United States?” Although India is still a graduate market, interest in undergraduate education is rising. This trend is fueled by intense competition for limited seats at respected institutions in India. A number of international schools offering the International Baccalaureate (IB) have opened across India. In Mumbai alone, there are 27 schools offering the IB curriculum while there are 51 schools offering the CIE (A levels) curriculum. Prep schools that traditionally focused on preparing their students for the entrance exams to the Indian Institutes of Technology and other prestigious colleges in India have begun to offer a parallel track of preparing students for study at foreign, primarily U.S., institutions. The

trend appears in the growing number of students taking the AP exams, SAT, and ACT. Twinning programs and transfer options are of great interest to Indian students, given the attractive possibility of lowering the overall cost of an education. Community colleges are similarly attractive destinations for the same reason. India’s Ministry of Human Resource Development, which oversees Indian higher education, looks to the U.S. community college model as a means to educate and train youth to respond to workforce needs.

Bangladesh: Bangladesh has experienced another quantum leap in the number of students on U.S. campuses — a 25.4 percent increase from 2013 to 2014. The U.S. Ambassador to Bangladesh continues to push student recruitment as a high priority. The U.S. Embassy’s goal is to have 30,000 Bangladeshi students studying in the United States, and the growth of current numbers can safely be predicted to continue. This is a relatively small country, slightly larger than New York state, but with a population of 161,083,804. Local tertiary educational institutions cannot meet the demands of Bangladesh’s population. The United States has always been a popular study destination for Bangladeshi students and, with Embassy promotion and EducationUSA advising, U.S. study is now an achievable goal for many. According to *Open Doors*, Bangladesh has shown an 83 percent increase in students in the United States from 2010 to 2014.

Kazakhstan: Kazakhstan is a landlocked country with a population of over 17 million, a stable political environment, a rapidly growing economy, and rich oil and gas reserves. One of the strongest economies in Central Asia and the first of the Soviet republics to pay off its debt to the IMF, Kazakhstan’s economy grew by eight percent in the last 10 years. The country aims to be among the world’s top 10 oil producers by 2020. This rapid growth in Kazakhstan is partially due to and bolstered by educational reform. Kazakhstan sends 37,000 self-paying undergraduate and graduate students overseas every year, and around five percent choose to study in the United States.

Kazakhstan’s overall 2013–2014 student mobility increased by just over two percent from 1,969 to 2,012 students in the United States. Sixty-seven percent of the students are at undergraduate programs with almost 31 percent of these students pursuing an associate’s degree. The 45 percent increase in the number of students in non-degree programs is a notable shift. The last several years saw a steady growth of Kazakh students in the United States, largely due to an improved economy and the country’s Bolashak Scholarship program. In 2011, Bolashak ended its undergraduate scholarship and introduced a professional and technical skill-development program, which accounts for the decreased numbers in degree programs and the increased numbers in non-degree programs.

South and Central Asia

Bolashak expanded to include arts and mass media industry professionals, along with public servants, academic and medical staff, engineers, and technical workers. The changes in the Bolashak scholarship aim to rectify a shortage of highly qualified specialists whose fields of expertise are needed to develop Kazakhstan's economy.

Bachelor degree students seeking education in English go to Nazarbayev University, the new flagship university in Kazakhstan. Many international universities, including University of Wisconsin-Madison, Duke University, University of Pittsburgh Medical Center, and University of Pennsylvania, partner with this institution in the areas of curriculum and program design, faculty recruitment, admissions process review, and quality assurance. Nazarbayev University gained access to these opportunities through a competitive process run by the government of Kazakhstan. In 2014, the government announced plans to reduce the number of Kazakh universities over the next five years from 139 to 100. This decrease adds to the nearly 300 institutions already closed. EducationUSA advising forecasts that the number of Kazakh students seeking high-quality education overseas will increase dramatically.

Nepal: There has been a decrease in the number of Nepali students studying in the United States for the fifth year, a 30 percent decrease from 2009 to 2014. Despite the decrease, Nepal still ranks 16th in the top 25 countries of origin of international students in 2013–2014.

Students in Nepal are attracted to countries where they anticipate ease of student visa issuance and/or reduced educational expenses. The Nepal Ministry of Education for Overseas Studies (MOE) reports that, of the total recipients of no-objection letters from the MOE (a letter that gives Nepali students permission to go abroad for higher education), 11,184 were heading for Australia, 7,933 for Japan, 1,456 for the United States, and 1,190 for Malaysia. To encourage more students to choose U.S. study options, EducationUSA Nepal continues extensive outreach efforts alone and in collaboration with the U.S. Embassy, facilitating outreach to students outside the Kathmandu urban area. Facebook chats held bi-weekly are especially popular.

Pakistan: Pakistan shows strong growth in international mobility, and the increase of students in the United States is testimony to the intense collaborative efforts of EducationUSA Pakistan and the U.S. Embassy and Consulates. More than 34,000 Pakistani students currently study abroad. The major cities of Karachi, Lahore, and Islamabad/Rawalpindi have large populations of students who apply to study abroad, but cities like Faisalabad, Sialkot, Gujrat, and Gujranwala also have prospective students interested in pursuing higher education outside of Pakistan. U.S. institutions planning to recruit in Pakistan should broaden their selection of target cities. The U.S. Educational Foundation in Pakistan administers several U.S. government exchange programs for U.S. study and hosts three of the four EducationUSA

advising centers in Pakistan. Since 2010, hundreds of students have studied at U.S. campuses for at least one semester through these exchange programs. Upon return, these students share with peers their positive experiences, influencing opinions and shaping the mobility trends among Pakistani students. Pakistani youth are academically strong and globally aware due to the widespread use of the internet and exposure to the 20 television news channels now present in the country. They are increasingly interested in U.S. study options and able to make discerning choices when comparing them to other international options.

What to Expect in the Next Three to Five Years

- Across the region, competition for the limited number of seats at respected local undergraduate institutions, particularly for engineering and business, may result in an increase in undergraduate applicants to the United States. Targeted recruitment efforts will yield measurable results.
- Data indicates a continuing rise in the number of Bangladeshi students choosing U.S. study options. U.S. HEIs should consider actively recruiting from Bangladesh.
- In 2014, the United States and India jointly declared a strategic partnership with the mantra *Chalein Saath Saath: Forward Together We Go*. A total of \$10 million (five million dollars from each country's government) has been jointly pledged to the 21st Century Knowledge Initiative, which

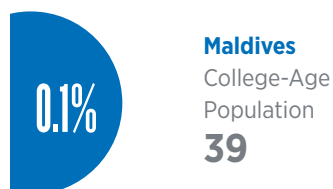
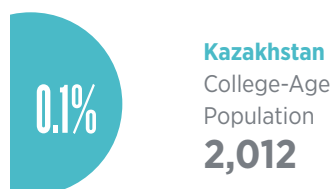
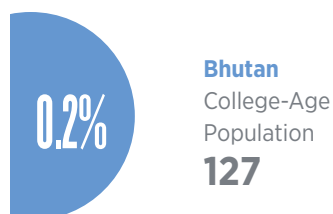
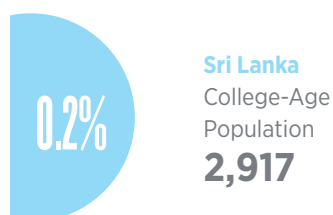
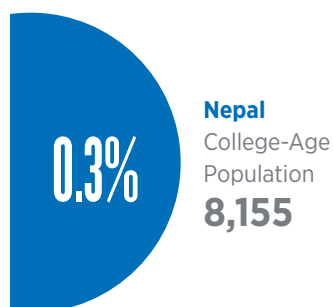
Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students (Five-Year Trend)

Country	2009/10	2013/14	%Change
Bangladesh	2,619	4,802	83.4%
Turkmenistan	195	214	9.7%
Afghanistan	426	450	5.6%
Kazakhstan	1,936	2,012	3.9%
Bhutan	126	127	0.8%

83.4%

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

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



Source: UNESCO Institute of Statistics; Indicator: 2013 Population of the official age for tertiary education, both sexes

strives to fund collaborations in the fields of energy, climate change, and public health with the Fulbright-Nehru program supporting over 300 scholar exchanges. The Passport to India program has been re-launched in partnership with The Ohio State University to increase collaborations with internships in the private sector, service learning, and study abroad in India. A Passport to India MOOC is also being planned for American students to learn about opportunities in India. The Indian government continues to explore new ideas through the Global Initiative of Academic Networks (GIAN) to create opportunities for U.S. professors in STEM to teach in India on short-term exchanges.

- The number of transfer applications and twinning programs in India is growing. Indian institutions actively seek to form partnerships and collaborations.
- The Community Colleges for International Development (CCID) initiative in India and Pakistan is increasing the number of students enrolled in two-year programs. Interest in other low-cost or short-term programs will rise as students seek affordable U.S. credentials.
- The U.S.-Pakistan University Partnership initiative, funded by the Public Affairs Section of U.S. Embassy Islamabad, establishes long-term relationships between Pakistani institutions of higher learning and those in the United States. These three-year partnerships promote: 1) professional development for faculty, 2) curriculum reform, 3) joint research, and 4) increased mutual understanding between Pakistan and the United States through sustainable, peer-to-peer relationships. Eighteen partnerships have been established. Their success will lead to other institutions seeking comparable programs.

Foreign Government and Private Funding

- Kazakhstan: The Ministry of National Education scholarships provide full funding for study in the United States, including a monthly stipend for living expenses, a return plane ticket, and health insurance. The scholarships can be used for general English studies, master, and doctoral programs, as well as short-term scientific training

opportunities (www.kazakhembus.com/page/bolashak).

- Many governments in South Asia, notably Afghanistan and Pakistan, allocate yearly funding for students to pursue higher education overseas. However, students with government funding often attend schools closer to home in countries such as the United Kingdom, Turkey, and India because of lower tuition, proximity, and similar cultural traditions. Many students desire to study in the United States, and universities able to offer competitive tuition or discounts will have a recruiting advantage.

Virtual and Social Media Usage

- Across the region, most students do not have high-speed internet connections (average speed of 1.7 Mbps), making it difficult to download large files.
- Students in the region increasingly use smartphones and tablets. Facebook, LinkedIn, Twitter, YouTube, and Google+ continue to be very popular. Other popular apps in South Asia are WhatsApp, Viber, and Skype.
- In Kazakhstan, social media pages are becoming one of the strongest components for promoting study programs, scholarships, and EducationUSA center events. Kazakh advisers extensively use Facebook and Vkontakte (vk.com).
- EducationUSA advisers in the region use newrow and Skype to connect with local students. U.S. institutions collaborate

Regional Student Totals by Top Five Countries of Origin

Country	2013/14	% Change 2012/13
India	102,673	6.1%
Nepal	8,155	-8.6%
Pakistan	4,935	3.4%
Bangladesh	4,802	25.4%
Sri Lanka	2,917	4.2%

South and Central Asia

with EducationUSA advisers on creating content, sharing posts, and conducting virtual advising sessions.

- EducationUSA advisers in India host virtual advising through weekly live chats on Facebook and live sessions on Skype and newrow.
- EducationUSA in Sri Lanka hosts a weekly Facebook chat, enabling students to get immediate replies to their questions.
- EducationUSA at the EMK Center in Dhaka, Bangladesh schedules regular Skype sessions for students to interact with U.S. higher education institutions.
- In Afghanistan, few people have regular internet access. Information is shared over SMS. To send information via SMS about a U.S. institution or program, contact the EducationUSA adviser in Kabul for assistance.
- Pakistan has banned YouTube since 2012. There is some access to the site through proxy servers, but many users have moved to alternative websites like Vimeo and Daily Motion.

Successful Recruiting Strategies

- Connect with students through EducationUSA college and university fairs. Both graduate and undergraduate

applicants appreciate the opportunity to meet university representatives, discuss available options, and have their questions answered so they feel well informed when making decisions about where to apply.

- Initiate summer programs for high-school students. A positive experience on a summer program encourages students to continue toward a degree program with that institution.
- Connect with the EducationUSA advisers at centers in the region. Provide informational seminars that showcase the breadth of U.S. higher education and highlight the strengths of educational institutions or insights into specific fields of study that may be unfamiliar to the general public. This subtle promotion of institutions or programs can significantly enhance recruitment efforts.
- Combine multiple partial financial aid awards into larger awards for fewer students. Providing larger awards serves as a magnet to attract good students who share their positive experiences with peers, encouraging them to apply. Word of mouth is the most effective recruiting tool in the region.
- Encourage alumni of your institution to represent your college or university at EducationUSA fairs and visit the

EducationUSA centers to conduct sessions and meet students.

- Enlist parents of enrolled students to meet parents of prospective students. They can provide a sense of security to families anxious about sending their children abroad.
- Clearly inform prospective students of their Optional Practical Training (OPT) options and internship possibilities. Applicants in the region give significant importance to their post-graduation career prospects.
- Talk to applicants and their parents via Skype or take advantage of multimedia facilities and webinars at advising centers. They will appreciate the opportunity to speak directly to a U.S. university representative or student.
- Expand your list of recruitment cities. EducationUSA can advise on how to reach beyond youth populations in capital cities. Students in both rural and urban areas aspire for upward social mobility through higher education abroad.
- Showcase success stories. Emphasize the value of a degree from your institution, options for affordable financing and scholarships, as well as the successful career trajectories of your alumni.

EducationUSA Regional Reach

2014 EducationUSA in South and Central Asia made **2,269,743** contacts

Centers		Outreach		Virtual*	
Contacts made through Advising Centers.....272,945		Contacts made through Outreach Activities..... 286,380		Contacts made through Virtual Platforms.....1,710,418	
Advising center-based contacts..... 272,410		Education fairs.....132,346		Social Media Platforms.....1,709,292	
U.S. institution representative visits.....535		American Corners/ Centers.....11,229		Webinars, DVCs1126	
		Local Universities/ Secondary Schools.....104,818			
		Other fairs/conferences/ seminars 19,017			
		Host government events960			
		Embassy/consulate events.....4,652			
		Public locations 9,003			
		Other activities4,355			

* Includes social network page likes, profile friends, or group members; video views; Skype contacts; blog and mini-blog followers; digital video conference participants; and EdUSA webinar participants.

* Includes social network page likes, profile friends, or group members; video views; Skype contacts; blog and mini-blog followers; digital video conference participants; and EdUSA webinar participants.

- In India specifically, U.S. universities should target outreach to growing secondary cities such as Coimbatore, Pune, Vishakhapatnam, Kochi, Vijayawada, and Guntur to maximize reach.

Regional EducationUSA Events

Use the EducationUSA website to find country-specific information about upcoming fairs, webinars, and other events and activities. Several EducationUSA advising centers plan local events during the year.

Fairs and Conferences

In addition to the many in-person student recruitment opportunities offered through participation in EducationUSA fairs and conferences, representatives of U.S. institutions often take advantage of these events to receive a country briefing from EducationUSA advisers, meet with U.S. Embassy public affairs and consular staff (subject to scheduling availability), make a presentation at an EducationUSA advising center, and/or visit a local high school or college. Contact the EducationUSA staff organizing the event to explore options for maximizing the impact of your participation.

Bhutan: The Bhutan Chamber of Commerce and Industry organizes an annual International Education Fair in Thimphu in March. For details, please contact REAC Ishrat Jahan.

India: The EducationUSA Tour in India, organized in partnership with IIE and EducationUSA host institutions, takes place in the fall and travels through up to seven cities. In the future, EducationUSA plans to host a tour in the spring to explore untapped markets and lesser-known cities. EducationUSA India also hosts alumni fairs in December/January. For details, contact REAC Ishrat Jahan at IJahan@educationusa.info.

Kazakhstan: The U.S. Embassy in Astana and Consulate in Almaty organize U.S. college fairs, and EducationUSA centers participate in the International Student Fair (spring and fall), Begin Group International Education Fair (spring and fall) and the Globus Education Fair (winter). In April 2014, the first EducationUSA Tour took place in Kazakhstan, traveling through the student-filled cities of



EducationUSA Study Abroad

Top Five Receiving Countries in the Region

Destination	2012/13	% Change
India	4,377	-4.7%
Nepal	383	49.0%
Bangladesh	140	30.8%
Sri Lanka	87	-14.7%
Bhutan	26	-7.1%

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

Country Name	2008/09	2012/13	% Change
Bhutan	1	26	2500.0%
Kyrgyzstan	4	18	350.0%
Sri Lanka	22	87	295.5%
Nepal	123	383	211.4%
Pakistan	5	11	120.0%

South and Central Asia

Best Times of Year to Interact with Students

In Muslim majority countries, avoid the month of Ramadan.

Afghanistan: April-June and August-October, except in the southern provinces of Kandahar and Nangarhar where best times are September-December and February-April.

Bangladesh: February-March. India: April-December and also in January-February. School and college examinations normally take place between February and April.

Kazakhstan: September-May is a good time for school visits. October, November, February, and March are fair times. Avoid summer, the first 10 days of January, and the last week of March as they are all school breaks.

Kyrgyzstan: September-November, February-April. Exams take place in December and January, May and June. Consider joining EducationUSA fairs in September and October.

Nepal: Avoid the largest Nepali festival period, which typically falls in October. During this time, schools and colleges are closed and many students will travel home.

Pakistan: September-January.

Sri Lanka: Avoid April and August. The best times to engage are July after exams and October after exams.

Tajikistan: February-April and October-November. Join education tours in April or during International Education Week in November.

Turkmenistan: August-November, April-June.

sessions on different topics, such as essay writing.

Outreach: EducationUSA advisers conduct outreach at local secondary and tertiary educational institutions to inform students of U.S. higher education options and application procedures.

Counselor Network: Several countries in the region have formed high-school counselor groups, led by EducationUSA advisers, to share best practices and learn more about topics such as student visas, writing personal statements, application timelines, and finding the best institutional fit.

Alumni Fairs: Some countries, mainly India and Pakistan, host alumni fairs, inviting students and parents to meet current students and recent graduates of U.S. universities. Universities are encouraged to send materials.

Student Peer Groups: Advising centers work with dedicated groups of students over one to two years to prepare for U.S. university admissions. Departing students invite and mentor new students at the center.

Test-Prep Programs: Some countries organize and mentor groups of students in preparation for standardized tests.

Webchats: Centers host regular webchats on Facebook and other social media platforms.

U.S. Study Abroad in the Region

India continues to have the largest population of study abroad students in South and Central Asia with over 4,000 U.S. students. For the 2012–2013 academic year, Bangladesh and Nepal saw a significant rise in American students with an increase of 30 percent and 49 percent, respectively.

The U.S. Department of State continues to support the Passport to India initiative (<http://goo.gl/MoHIVS>). Private sector funding supports business internships linked to students' academic interests, summer scientific research internships, and service learning internships in India. ★

Almaty, Astana, Aktobe, and Shymkent. For details, contact REAC Ishrat Jahan: IJahan@educationusa.info.

Pakistan: The annual Dawn Education Expo in Pakistan runs for one week in February and travels from Islamabad to Lahore and Karachi, attracting more than 10,000 participants. For more information, you can contact Umair Khan, EducationUSA adviser in Islamabad, at umair@usefpakistan.org.

South Asia Tour: Join this tour through Bangladesh, Nepal, Pakistan, and Sri Lanka. The tour includes university fairs, school visits, and cultural activities. The costs of this tour are kept as low as possible to offer an affordable recruitment opportunity. For details, contact REAC Kathleen Alam: ReacLahore@educationusa.info.

Turkmenistan: The government sponsors an annual International Exhibition and Scientific Conference, *Education, Sport and Tourism in the Era of Power and Happiness*, in Ashgabat in November. The EducationUSA advising center

reaches thousands of high-school and university-level students, parents, teachers, professors, and organizations at this event. For details, contact the EducationUSA center at eac@americancouncilstm.org.

Uzbekistan: The Expocontact Ltd. Company under the Chamber of Commerce and Industry of the Republic of Uzbekistan organizes an annual Education and Career Fair with support from the Ministry of Higher and Secondary Specialized Education of Uzbekistan. More than 30,000 high-school and university students, as well as faculty, attend the fair. In 2014, the fair took place in February. For details, contact the EducationUSA center in Tashkent at Tashkent-Advising@state.gov.

Center Events

Check with individual centers to find out what activities they have planned. Some ongoing highlights include:

Weekly Group Sessions: EducationUSA centers host weekly group sessions with local students, along with specialized

Western Hemisphere

Regional EducationUSA Profile

Anguilla, Antigua and Barbuda, Argentina, Bahamas, Barbados, Belize, Bolivia, Brazil, Canada, Chile, Colombia, Costa Rica, Cuba, Dominica, 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

Advising centers in the **Western Hemisphere (WHA)** are located in U.S. Embassies and Consulates, bi-national centers, Fulbright Commissions, local higher education institutions, and other nonprofit organizations.

EducationUSA advising centers in Argentina, Barbados, Brazil, Bolivia, Canada, Chile, Colombia, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Peru, Paraguay, and Venezuela administer the Opportunity Funds programs that support talented, economically disadvantaged undergraduate and graduate students with the upfront costs of applying to U.S. institutions. These centers conduct extensive outreach to promote Opportunity Funds to both prospective undergraduate and graduate students with the full support of local U.S. Embassies and Consulates. Through EducationUSA Opportunity Funds, competitive college clubs, and other cohort-advising models, EducationUSA advisers meet on a regular basis with top high-school and university students to guide them through the application process. Monthly meetings and individual appointments are held to work with students as they find the best institutional fit to meet their needs academically, socially, and financially. Advisers prepare specialized workshops on how to write a personal statement/essay and explain to students the importance of this component in the application process.

EducationUSA advising centers promote and facilitate Massive Open Online Courses (MOOCs) as tools to familiarize students with U.S. higher education and promote college readiness. Centers may also work with facilitated MOOC discussion groups held at U.S. Embassies and Consulates

as part of the State Department's MOOC Camp initiative.

Advisers in the Western Hemisphere use social media to disseminate information about U.S. higher education. They leverage Facebook to advertise EducationUSA webinars and Interactive web chats, U.S. higher education visits, and the EducationUSA *Weekly Social Media Digest* to expand the number of students reached. WHA countries also target less frequently visited cities and provinces to reach new student audiences through social media.

Advisers target their online services and marketing efforts to nontraditional youth audiences in remote locations like Patagonia, the Galapagos Islands, the Amazon, and the Canadian Arctic. In the past year, advisers throughout the Western Hemisphere hosted more than 400 EducationUSA webinars to link U.S. institution representatives with local students. Other social media applications, such as Instagram, Pinterest, and Twitter have become popular among the youth audience in the region.

EducationUSA advisers have expanded the pool of local high schools with high academic standards in the circuit of U.S. colleges and university visits. As a result, the region has experienced an increase in undergraduate recruitment outside of bilingual schools. EducationUSA fairs throughout the region attract significant participation of prospective students. Advisers also participate in and organize student viewing parties for virtual college fairs.

Advising centers in Brazil, Chile, Ecuador, Mexico, Panama and Peru partner

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EducationUSA
Advising Centers
in the Region

61 Comprehensive
49 Standard
17 Reference



Western Hemisphere

with local governments to advertise undergraduate and graduate foreign government study-abroad scholarships. They promote the opportunities in local languages, encouraging students in these countries to apply to U.S. higher education institutions. Universities in the region remain interested in developing more partnerships with U.S. institutions. In Argentina, Brazil, Chile, and Mexico, U.S. universities have established regional offices and branch campuses.

Regional Overview

Canada, the Caribbean, and Latin America make up the Department of State's Western Hemisphere region (WHA), a diverse area that spreads over 39 countries and boasts a combined total population of approximately 900 million. With five countries among the top 25 sending countries of international students to the United States (Canada, Mexico, Brazil, Colombia, and Venezuela), and 100,622 students in the United States during the 2013–2014 academic year, Western Hemisphere countries are second only to Asia in terms of international student mobility to the United States. The governments of Argentina, Bolivia, Brazil, Chile, Colombia, Dominican Republic, Ecuador, Mexico, Panama, Peru, and Uruguay currently provide funding that supports this flow, and growing and stable economies in major sending countries like Colombia and Mexico lay the foundation for continued exchange.

National resource extraction drives the expanding national economies of Brazil,

Chile, and Peru, although Brazil had only a small percentage economic increase this year. IT and canal-related industries push Panama's steady economic growth. Mexico's energy, automotive, aeronautical, and manufacturing industries continue to grow exponentially, strategically targeting cross-border opportunities. Ecuador continues to move forward with building a "city of knowledge" devoted to research and innovation. As a result of their expanding economies, Brazil, Chile, Ecuador, Mexico, Panama, and Peru have allocated substantial resources to develop creative industries while also expanding science, technology, and innovation initiatives through international exchange. This trend has also resulted in increased efforts to internationalize local universities and research centers and to support the opening of U.S. branch campuses and representational offices in the region. Bolivia is gradually following the example of neighboring countries in the region by increasing investment in education. One of the fastest growing countries in the region due to its natural resource richness and current economic stability, the Bolivian government funds a scholarship program for graduate studies abroad in STEM fields, demonstrating its priority in developing its human capital. In Brazil, Chile, and Mexico, investment in creative industries brings academia and industry together through international university partnerships. In Mexico and Central America, workforce development is a priority in bilateral dialogues with the United States, resulting in a focus on partnerships between non-traditional

institutions such as technological universities and community colleges in both regions, with the support of the private sector. Education is a key priority at U.S. Embassies in Latin America.

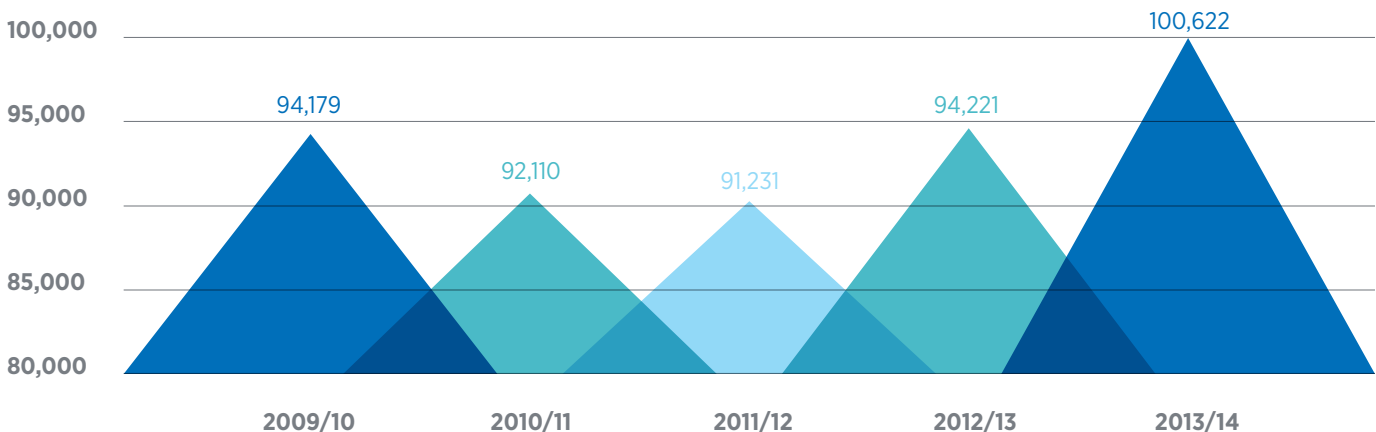
Recent Trends

In March 2011, President Obama announced the 100,000 Strong in the Americas initiative to increase the number of Latin American and Caribbean students studying in the United States and in the region to 100,000 in each direction by 2020. As the initiative grows, it fosters region-wide prosperity through greater international exchanges of students—future leaders and innovators. Currently, South America (Andes and Southern Cone) sends 38.9 percent of Western Hemisphere students to the United States, followed by Canada with 28.1 percent, Mexico and Central America with 22.1 percent, and the Caribbean with 10.8 percent.

- 100,000 Strong in the Americas, a public-private partnership between the U.S. Department of State, Partners of the Americas, and NAFSA: Association of International Educators has conducted six grant competitions that support student mobility in the region. EducationUSA advising centers and U.S. Embassies promote the competitions among U.S. and local higher education communities to encourage the establishment of partnerships to increase student mobility. The website www.100kstrongamericas.org/ announces the latest information, including requests for proposals and

Student Mobility (Five-Year Trend)

Source: Institute of International Education, funded by a grant from the U.S. Department of State, *Open Doors Report on International Educational Exchange*





related news. Many binational centers in the region support 100,000 Strong in the Americas with training in Spanish and Portuguese on how to prepare and submit grant proposals. Winners of the first awards have already attracted more than 200 U.S. students to the region.

- The United States continues to be the region's premier international destination for students despite increasing competition from Spain and other European countries, Australia, and other Western Hemisphere countries (Canada, Cuba, and Chile). The number of Latin American students outside of their own countries has increased consistently over the years, by over eight percent in 2013–2014 to 72,318 students with growth from Anguilla, Aruba, Bahamas, Brazil, Chile, Colombia, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Uruguay, and Venezuela. The perceived cost of studying in the United States, the continuing misperception that it is difficult to get a student visa, language barriers, the challenge of validating a U.S. degree in their home country, and the employment possibilities following graduation influence students' decisions of whether or not to study outside of their home country.
- In an effort to retain the student population within the region, Caribbean Community (CARICOM) countries offer students tuition support to enroll in local or regional higher education institutions,

affecting student mobility from countries like Trinidad and Tobago.

- Sustained economic growth in Colombia (almost five percent), the Dominican Republic (4.6 percent), Nicaragua (4.6 percent), and Peru (5.8 percent) is a key driver of student mobility (*World Bank: Annual Percentage GDP Growth from 2010-2014*). Chile's recent transition to a high-income country (*World Bank, Global Economic Prospect Report, January 2015*) impacts that country's student mobility in a positive way.
- Migratory trends and in-state tuition opportunities continue to influence Caribbean student mobility to Florida and New York. EducationUSA advising centers, with support from U.S. Embassies in the region, are working towards diversification of options by highlighting minority-serving institutions, as well as partnering with local organizations that support non-traditional students.
- Central American countries continue to report a high percentage of enrollment in two-year institutions. Honduras, for the fifth consecutive year, has the largest increase (16 percent) in mobility from this sub-region, closely followed by Panama and Guatemala.
- EducationUSA advising centers throughout Mexico, Central America, and the Caribbean have noted an increased interest in short-term and pre-professional experiences in the

United States. From intensive language preparation to summer programs and internships, EducationUSA advisers are reaching out to the U.S. higher education community to collect current information on these programs.

- The Uruguayan government has incorporated English teaching and technology as part of the curriculum at all educational levels. English instruction has been incorporated into most public elementary school curricula and is compulsory during the last six years of instruction at public and private middle schools and high schools. The country has been participating in the One Laptop per Child program since 2005.
- Brazil, Colombia, Peru, Ecuador, Mexico, and Panama are investing in English skills for teachers by sending them to U.S. universities for short-term programs. This is part of a long-term strategy to build English language capacity. Peru and Ecuador also provide local scholarships for English training with government graduate scholarships to study abroad, thus encouraging students to choose programs in English, especially at U.S. institutions.
- Media in Brazil reported the expanding appeal of online courses, drawing the attention of major companies in the sector. Brazilians comprise the fourth largest group of students using Coursera with over 400,000 enrolled in online education courses, which led the

Western Hemisphere

company to partner with the Universities of Sao Paulo (USP) and Campinas (UNICAMP) to create tailor-made courses for Brazilian teachers. Brazilians are the third largest group enrolled in Stanford University's Novo Ed platform and in Udacity.

- Higher education institutions in Mexico, Central America, and the Caribbean continue to design their internationalization strategies emphasizing online and virtual education, as well as dual-degree programs with U.S. institutions. To address the challenge of credit transfer, they are working towards the creation of a regional credit system, which they hope will facilitate sustainable exchanges with the United States.

Countries in the Spotlight

Barbados: The Caribbean Science Foundation administers, among other programs, the Student Program for Innovation in Science and Engineering (SPISE), an academic enrichment program that brings talented STEM students to the United States for hands-on training. EducationUSA Barbados works closely with SPISE program students to support their interest in U.S. studies.

Bolivia: Steady economic growth has given more Bolivians the possibility of studying abroad. The Bolivian government is investing in higher education by promoting educational reforms and offering Bolivians the opportunity to study internationally at the graduate level. EducationUSA La Paz had over 10,000 student contacts

last year and Santa Cruz office counted approximately 11,000 individual personal contacts and over 17,000 thousand virtual outreach contacts. The number of undergraduate and graduate students from Bolivia at U.S. higher education institutions is expected to grow in the next several years.

Brazil: The Brazilian Scientific Mobility Program (*Ciencias Sem Fronteiras*— www.cienciasemfronteiras.gov.br) continues to send many Brazilian students to study abroad. By December 2014, the program had funded 77,806 students; the United States remains the leading destination with approximately 30,000 students since the program's inception. Undergraduate exchange participants made up 79 percent of students; 19 percent studied in graduate and post-graduate programs; and two percent enrolled in non-degree programs. In June of 2014, the Brazilian president announced an initiative to send another 100,000 students abroad over the next four years. Engineering is the most popular field, followed by biology, creative industries, sciences, and computer science.

The Brazilian government also launched an English without Borders program in-country to prepare students to study in English-speaking countries. The program offers intensive English classes at 43 federal universities, reaching more than 120,000 students a year. The Fulbright Commission in Brazil and the Brazilian government sent over 100 English Teaching Assistants (ETAs) to facilitate English teaching at all these universities, and EducationUSA advisers trained the ETAs to help guide students on U.S.

study. EducationUSA advisers created a blog in Portuguese with links to Brazilian governmental agency websites where students can search for U.S. universities and view tutorials on essay writing, TOEFL-taking tips, and more: <http://goo.gl/ra4jtG>.

Chile: Chile is the eighth largest sending country in Latin America and the 21st destination world-wide for U.S. students studying abroad. In 2014, Chile experienced record attendance at the EducationUSA Fair with over 3,500 participants. Two Academic Writing Centers opened in Chile in 2013 in conjunction with the U.S. Embassy and local host universities. They have been a unique resource for Chileans, providing individual support to students keen on improving their writing for standardized tests, personal statements, and college application essays. EducationUSA hosted an Education Summit with the support of the U.S. Embassy in Chile for governmental and academic representatives from the two countries to discuss the state of higher education, student mobility, and collaborative research.

Mexico: In support of the Mexico-U.S. Bilateral Forum on Higher Education, Innovation, and Research (FOBESII), the U.S. and the Mexican governments, in collaboration with the private and education sectors of each country, established a framework for implementation that focuses on academic mobility, language acquisition, workforce development, research and innovation, and border relations. In 2014, the Mexican government increased funding to the Fulbright-Garcia Robles scholarships and

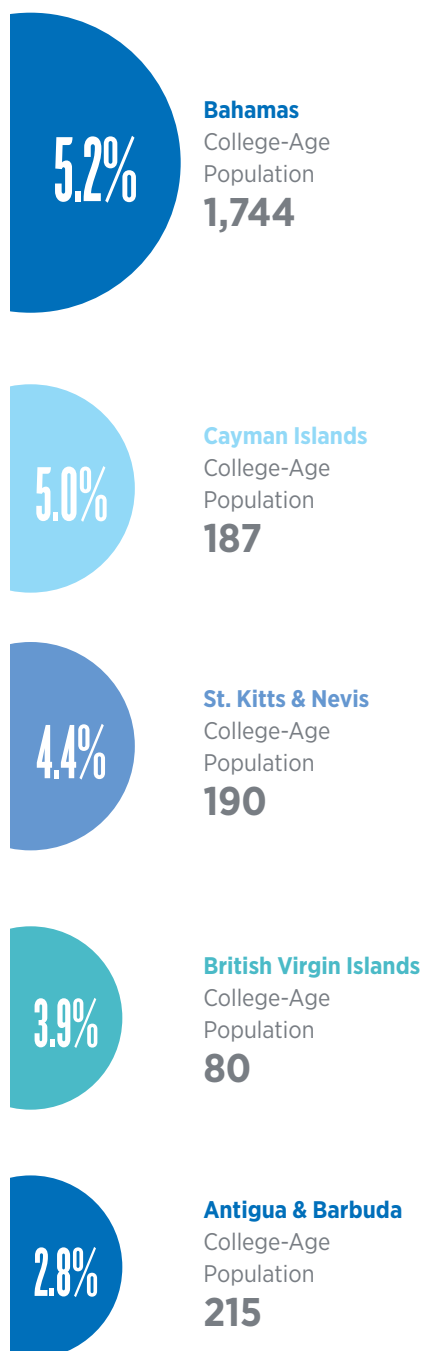
Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students (Five-Year Trend)

Country	2009/10	2013/14	%Change
Brazil	8,786	13,286	51.2%
Paraguay	340	492	44.7%
Venezuela	4,958	7,022	41.6%
Panama	1,082	1,428	32.0%
Honduras	1,337	1,756	31.3%

51.2%

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

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



Source: UNESCO Institute of Statistics; Indicator: 2013 Population of the official age for tertiary education, both sexes

developed new scholarship programs for foreign academics to travel to Mexico through the National Council of Science and Technology (CONACYT) to engage in scientific, social, and artistic research. Additionally, the Mexican Government's *Proyecto* 100,000 supported approximately 11,000 Mexican students and faculty in intensive English programs, summer research opportunities, semesters abroad, and other short-term exchanges. The Mexican government announced that the program will continue in 2015, primarily focusing on intensive English and research programs. Three hundred Diversity Scholarships will be awarded to Mexican undergraduates and graduates to pursue a semester abroad and master's programs, respectively.

EducationUSA centers in Mexico have been identified, along with the Mexican Consulates in the United States, as official FOBESII information sources. Accordingly, with support from the Mexican government and local partners, EducationUSA Mexico plans to expand to 30 advising centers before the end of 2015 with support from the Mexican government. In an attempt to centralize information on study abroad opportunities, the U.S. Embassy in Mexico and *Universia* (<http://www.universia.net>) created *Mobilitas*. Interested institutions may join the portal by visiting www.mobilitasedu.net.

Panama: The Panamanian government announced *Panamá Bilingüe* in 2014. The goal is for 10,000 English teachers to participate in six-month teacher training programs by 2019 (2,000 a year) to increase the quality of English teaching in public schools. One long-term goal is to place Panamanian teachers in U.S. universities for English immersion and teacher training in programs that include leadership, methodology, classroom management, assessment, content/language integration training, and practicums. Panama's SENACYT continues to administer several scholarship programs at the undergraduate and graduate levels covering a wide range of fields, including a Fulbright-SENACYT scholarship.

Peru: Peru's government continues to invest in international exchange with more than 900 graduate scholarships in 2014. In addition, the government has

expanded English training opportunities. In 2014, more than 230 public school teachers benefited from this program with another 100 school teachers expected in a second round. EducationUSA in Peru will collaborate with PRONABEC's second cohort of school teachers as they head to study at U.S. universities. The Peruvian government project *BECAS 18* helps students from disadvantaged backgrounds achieve admission to public and private universities throughout the country. Future project goals include helping grantees with advanced levels of English apply to U.S. undergraduate programs. EducationUSA Peru hopes to collaborate with this program. Uruguay: The issuance of student visas in Uruguay saw an increase of more than 60 percent since 2011, building on interest in U.S. study fed by U.S. Embassy and EducationUSA promotion of U.S. higher education. U.S. university fairs, the expansion of Uruguay's EducationUSA advising network, agreements between U.S. and Uruguayan universities, and the collaboration among the U.S. Embassy, the Binational Center, and the Fulbright Commission all added to these efforts.

What to Expect in the Next Three to Five Years

North and Central America and the Caribbean

- Services to new immigrants, Francophone citizens, and Aboriginal Canadians constitute part of the EducationUSA Canada portfolio. Increased outreach with support from U.S. Consulates in Canada continues to be a priority, especially now that Canada

Regional Student Totals by Top Five Countries of Origin

Country	2013/14	% Change 2012/13
Canada	28,304	3.5%
Mexico	14,779	4.1%
Brazil	13,286	22.2%
Colombia	7,083	8.3%
Venezuela	7,022	14.0%

Western Hemisphere

is part of the 100,000 Strong in the Americas initiative.

- *Proyecto 100,000* is the Mexican government initiative born of the Bilateral Forum on Higher Education, Innovation, and Research between Mexico and the United States (FOBESII) to support academic and research mobility for 100,000 Mexicans and 50,000 U.S. citizens by 2018. The initiative includes a variety of exchange programs at the undergraduate, graduate, and post-doctoral levels, as well as internships, language preparation, and other short-term stays. In early 2015, the governments of Mexico and the United States signed a letter of intent to formally create a U.S.-Mexico Internship Exchange.
- Martinique, Montserrat, and Netherland Antilles, traditionally Eurocentric, demonstrate increased interest in the United States as a study destination, due to the availability of financial support, accessibility, and proximity, resulting in significant increases in mobility.
- As workforce development remains a priority for most Central American countries, interest in short-term certificate programs and partnerships between technical universities and community colleges will continue to grow. In Nicaragua, the U.S. Embassy

is committed to the establishment of education councils such as the Study Nicaragua Council and the Science, Technology, Engineering and Math (STEM) Council, composed of university representatives, private sector participants, and NGO members to address the needs and resources of various educational, research and technological sectors. Among the objectives are partnerships with U.S. community colleges and continuing education for vocational workers from emerging industries, such as renewable energy, tourism, and mining.

- Public-private partnerships in Mexico and Central America serve as models for sustainability in regional academic exchanges. In El Salvador, the U.S. Embassy has established the 100,000 Strong Scholarship to increase resources for exchanges, public awareness of the most cost-effective options for overseas study, and to strengthen Salvadoran educational institutions. These resources complement El Salvador's Partnership for Growth, which invests in human capital and aims to strengthen the education sector in the long term.

South America: Andean Region

- Peru is projected to have a 4.8 percent national economic growth in 2015 (www.peruthisweek.com/news-produce-manufacturing-sector-will-grow-48-

this-year-105188). Peru's Ministry of Economy and Finance predicts that the Peruvian economy will continue to grow at a rate of 5-6.5 percent in the next three to five years, which should result in more funds for educational programs. The Ministry of Education, with the backing of President Humala, has invested in improving Peruvian public schools and in increasing the number of scholarships for greater Peruvian international student mobility. Positive U.S.-Peruvian bilateral relations have also influenced funding for students to study in the United States. The Peruvian government's investment in English language instruction in public schools throughout the country, better English language teacher training, as well as heightened promotion of international scholarships, drives the trend of more students choosing the United States as a higher education destination.

- Further economic prosperity and growth is expected in Bolivia, and the government will continue to invest in education to complement national development goals. Although there is no official plan to increase the number of graduate scholarships to study abroad, Bolivia continues to fund overseas scholarships.
- A decrease in global oil prices has had an impact on the Ecuadorian 2015

EducationUSA Regional Reach

2014 EducationUSA in the Western Hemisphere made **997,896** contacts

Centers	Outreach	Virtual*
Contacts made through Advising Centers.....545,958 Advising center-based contacts 542,765 U.S. institution representative visits 3,193	Contacts made through Outreach Activities.....279,545 Education fairs.....129,436 American Corners/ Centers.....5,944 Local Universities/ Secondary Schools 67,453 Other fairs/conferences/ seminars 37,492 Host government events 9,328 Embassy/consulate events.....11,002 Public locations 10,000 Other activities 8,890	Contacts made through Virtual Platforms.....172,393 Social Media Platforms.....167,262 Webinars, DVCs 5,131

* Includes social network page likes, profile friends, or group members; video views; Skype contacts; blog and mini-blog followers; digital video conference participants; and EdUSA webinar participants.

national budget. However, Ecuador's main development goal is to diversify its economy through the development of a knowledge society, supporting academic research and innovation. Ecuador's City of Knowledge, *Yachay*, continues to grow, with the government financing full scholarships for undergraduate, graduate, and English language programs. The government also encourages increased partnerships with foreign universities for academic research and innovation.

- During the fourth round of the U.S.-Colombia High Level Partnership Dialogue in 2014, cooperation for academic mobility emerged as a key topic. In the next several years, Colombia will continue to finance graduate programs abroad in areas of strategic interest for the country with U.S. institutions as a popular destination. Colombia has also ratified its goal of becoming a bilingual nation. Investment in English language initiatives is expected to increase in the next several years.

- For the past six years, Venezuela has held its position as one of the top 25 places of origin for international students in the United States. Venezuela is currently the fourth largest sending country in Latin America and the third largest sender in South America. This trend is expected to continue; however, the current Venezuelan economic recession might impact these numbers. Although economic and political instability could influence the number of Venezuelans studying at U.S. institutions, currently EducationUSA centers have not reported any significant decreases in student contacts. On the contrary, inquiries and demand for advising sessions have slightly increased. Venezuela is slowly relaxing currency controls, which should result in an increase of Venezuelans studying abroad. Currently, Venezuelan students abroad rely on the support of family members overseas or have foreign accounts.

South America: Southern Cone

- Brazilian students are poised to start applying for full undergraduate programs in the United States. In 2015, 40 percent of all vacancies in public universities in Brazil will be assigned to students from public high schools, and this

number will reach 50 percent in 2016. As a result, more middle-class students will be considering study abroad as the cost could be similar to attending a private Brazilian university. Also, the Brazilian Scientific Mobility Program has inspired siblings and friends of scholarship recipients who want to have the same opportunity of attending U.S. colleges, and Brazilian students are open to choosing less well-known U.S. HEIs. EducationUSA advisers and U.S. higher education institutions all reported great increases in the number of undergraduate applications from Brazil.

- The Argentine government launched a scholarship program for U.S. study for Argentine students.
- Chile continues to see steady growth in the number of students pursuing higher education in the United States with a 3.5 percent increase last year. *Becas Chile*, a government-supported scholarship program, has significantly

increased the number of students in the United States. Since 2008, *Becas Chile* has awarded over 5,500 scholarships at the graduate and doctoral level. Chile's proposed education reform will eventually have long-lasting effects on the Chilean education system; currently, accreditation issues and purported frustration with the Chilean higher education system make studying abroad attractive for many Chilean students.

Institutions can expect increased opportunities for recruitment and engagement in both Paraguay and Uruguay. Both countries are experiencing an increase in U.S. university visits, and EducationUSA advisers organize outreach programs for visitors in partnership with the U.S. Embassies in each country. Uruguay experienced record attendance in the last EducationUSA fair with 2,500 students. Paraguay will join the South America EducationUSA Fair circuit for the first time this year.

EducationUSA Study Abroad

Top Five Receiving Countries in the Region

Destination	2012/13	% Change
Costa Rica	8,497	7.6%
Argentina	4,549	-4.5%
Brazil	4,223	4.0%
Mexico	3,730	-2.2%
Ecuador	3,438	-3.8%

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

Country Name	2008/09	2012/13	% Change
Cuba	251	1,633	550.6%
Haiti	78	501	542.3%
Colombia	109	340	211.9%
British Virgin Islands	44	102	131.8%
Bolivia	196	345	76.0%

Western Hemisphere

Foreign Government and Private Funding

- **Argentina:** Launched in 2012 by the Argentine national government, BEC.AR continues to provide funding for qualified Argentine students to pursue master's degrees in U.S. universities in the STEM areas. Fulbright Argentina explains the process: <http://goo.gl/gAeYx>.
- **Bahamas:** The Lyford Cay Foundation (<http://www.lyfordcayfoundation.org/>) awards approximately 75 scholarships to Bahamian students for study abroad for both undergraduate studies and for technical and vocational training.
- **Barbados:** The Barbados Scholarships and Exhibitions (<http://www.mes.gov.bb/>) are merit-based undergraduate scholarships awarded to around 30 students who have received very high scores on the CAPE examinations or in an associate's degree program at the Barbados Community College. Students can study at home or abroad. Additionally, the National Development scholarships provide approximately 10 scholarships each year in various disciplines.
- **Bolivia:** In 2014, the Bolivian Ministry of Education launched *Becas de Estudios para la Soberanía Científica y Tecnológica* (Scientific and Technological Sovereignty Scholarships), aimed at Bolivian professionals who have graduated from private or public Bolivian universities. Eighty scholarships are open for candidates pursuing master's degrees and 20 for candidates pursuing doctoral studies at universities worldwide. Students selected for the first round are in the process of applying to graduate programs. EducationUSA advisers in Bolivia met the cohort of selected grantees and are assisting them with the process. EDUCAPRO, a private foundation, offers student loans for studies abroad: up to \$30,000 for undergraduate studies and up to \$40,000 for graduate degrees.
- **Brazil:** Since its creation in 2011, the Brazilian Scientific Mobility Program (BSMP) has awarded around 30,000 scholarships to Brazilian students who went to U.S. universities. The United States continues to be the leading destination for Brazilian BSMP students
- **Chile:** In 2008, the Chilean government

launched BECAS Chile, a Ministry of Education scholarship program aimed at developing human capital in Chile by sending Chilean students abroad. To date, the United States is the second leading destination for the more than 5,000 students awarded this scholarship. The initiative focuses mainly on graduate studies with a recent emphasis on PhDs in STEM fields. Thanks to EducationUSA and the U.S. Embassy in Chile, U.S. HEIs will receive students under the Technicians for Chile (*Técnicos para Chile*) government-sponsored scholarship program in the near future. EducationUSA has worked with the government of Chile for inclusion of U.S. universities as a destination for students in this scholarship initiative. Most Chilean universities have exchange agreements with U.S. universities. Dual degrees offered by Chilean and U.S. universities are on the rise.

- **Colombia:** According to Open Doors, Colombia has a high percentage (40 percent) of its total student mobility at the graduate level, due to government funding available at that level. The Colombian Foundation COLFUTURO offers loans/scholarships to qualified Colombian graduate students to study internationally; 1,453 students benefitted from the program in 2014. COLFUTURO administers the COLCIENCIAS program which, along with the National Planning Department (DNP) Program, provides funding for doctoral study abroad in the science, technology, and engineering fields. ICETEX, a public institution, provides student loans for Colombians interested in studying abroad.
- **Costa Rica:** The Costa Rica-USA (CRUSA) foundation manages programs to support exchanges, mainly at the graduate level in STEM fields with World Bank and local higher education institution funding support. The U.S. Embassy in Costa Rica supports several of these initiatives, including an EducationUSA cost-share Opportunity Funds program.
- **Dominica:** The Dominica government awards one Island Scholarship each year to the student who has earned the highest score in the CAPE examinations. Additionally, the Dominica government awards approximately five scholarships annually to the best student in each

of the five faculties of the Dominica State College.

- **Ecuador:** The National Secretariat of Higher Education, Science, and Technology (SENESCYT) offers study abroad opportunities for both graduates and undergraduates. High-school students with the highest marks in the national university entry examinations are eligible for a full scholarship to study overseas. The National Secretariat has developed a special program for Ecuadorian professors interested in pursuing doctoral degrees abroad. The areas of study of all scholarship programs vary with STEM fields, education, and the arts as priorities. *Institutos Técnicos* (Community Colleges) form part of the scholarship program with 14 U.S. community colleges. Ecuador also provides full scholarships to obtain an English teaching certificate for Ecuadorians who plan to become public high-school teachers. In addition to the grant programs described above, the Ecuadorian government through Banco del Pacífico provides qualified students with loans.
- **El Salvador:** The U.S. Embassy in El Salvador created the 100,000 Strong program managed by EducationUSA to design short-term exchanges and language training scholarships for Salvadorian students. The program runs a fundraising campaign and has proven successful in reaching the private sector, as well as the Salvadorian diaspora who are eager to support education opportunities.
- **Mexico:** The Government of Mexico announced its initiative *Proyecto 100,000* in 2013 to match President Obama's 100,000 Strong in the Americas initiative. To date, approximately 11,000 Mexicans have benefitted from the program. During 2014, the initiative focused on short-term exchanges, language acquisition, and teacher training. Graduate support continues to be channeled through the Fulbright Commission and CONACYT, the National Council for Science and Technology. Additionally, several initiatives have been implemented to support youth (*Jóvenes en Acción*) and a variety of short-term exchanges, including internships.

- **Panama:** According to the National Secretariat of Science Technology and Innovation's (SENACYT) strategic plan for 2010-2014, the government awarded 830 international scholarships for undergraduate and graduate studies (165 bachelors, 415 masters, 250 doctorates) in biological and health sciences, agricultural sciences, communication and information technology, and transportation and logistics. SENACYT seeks to sign articulation agreements with institutions overseas, and the United States is a priority destination. The GOP announced its initiative *Panamá Bilingüe* in 2014 with the goal of sending 10,000 English teachers by 2019 (2,000 a year) to participate in six-month teacher training programs. Additionally, SENACYT administers several scholarship programs at the undergraduate and graduate level covering a wide range of fields, including a Fulbright-SENACYT scholarship.

- **Peru:** The President of the Republic Scholarships Program (*Becas Presidente de la República*) supports graduate study abroad in the STEM fields at both the masters and doctoral levels. PRONABEC, a public agency connected with the Ministry of Education, manages the program. So far, 985 scholarships have been awarded. The leading destinations for PRONABEC scholars are Spain, Argentina, Australia, and Chile. The Peruvian government wants to increase the numbers of scholars studying in English-speaking universities and has announced a new round of competitions for English-language scholarships. *La BECA IDIOMAS – INGLES* promises to award 1,000 scholarships to Peruvian university students who have completed their university studies in Peruvian public or private universities. The goal is to help these students reach the English level needed to access PRONABEC scholarships. Binational centers and university language centers throughout Peru will receive scholarship recipients. Both EducationUSA and the U.S. Embassy have been energetically working with PRONABEC to remove barriers to an increased flow of Peruvian government scholarship students to U.S. institutions.

- **Uruguay:** The Fulbright Commission and the Uruguayan National Agency of

Innovation and Research (ANII) signed an educational exchange agreement in 2014. ANII will provide \$2,000,000 over the next two years to increase Fulbright scholarships for Uruguayan graduate students to study in the United States and for U.S. academics to teach in Uruguay. This is the largest contribution of the Uruguayan government since Fulbright was established in Uruguay in 1960 and the largest number of scholarships ever available to Uruguayans.

- **Organization of American States (OAS):** Students from member countries are eligible for up to \$15,000 in Rowe Fund loans. Scholarships of up to \$30,000 are available at the graduate level throughout the region and for undergraduate studies by students from English-speaking Caribbean countries.

Virtual and Social Media Usage

- EducationUSA advisers in the WHA region actively utilize social media. Although the most popular social media platforms vary from country to country, the most common throughout the region are Facebook, Twitter, and blogs. EducationUSA Chile has developed a successful social media campaign attracting over 18,000 followers on Facebook, and Brazil attracted over 45,000 likes. EducationUSA Colombia maintains an electronic virtual adviser, ED, available around the clock for consultations in Spanish throughout South America. EducationUSA Mexico City developed a blog that highlights U.S. financial aid, as well as local sources of funding in Mexico.

- According to United Nations Data collection (<http://data.un.org>), the Western Hemisphere has an internet penetration rate of almost 50 percent with some 275 million internet users. Comparing that data to Facebook usage statistics on <http://goo.gl/sblk5B> shows that 70 percent of internet users in the region also use Facebook.

- Internet access speeds in most urban areas are similar to the United States. Rural access may be more limited.

Successful Recruiting Strategies

- Attend regional college fair tours in Mexico (September/April), South America (September-October), Central

America (October), and the Caribbean (October/November).

- Interact with students through EducationUSA webinars and in-person presentations at advising centers. Make an effort to reach out to EducationUSA advisers from off-the-beaten track locations who are not often visited by U.S. institutions,

- Use alumni to recruit students while not underestimating the value of sending admissions staff to build trust and name recognition. Consult EducationUSA when sending alumni to represent your institution.

- Highlight anecdotes of institutional support and services that resonate with students from the region—culture, history, politics, sports, food, arts.

- Get a login to the EducationUSA website and find out about special conferences in the region that can be integral to student recruitment and the establishment of partnerships.

- Use Spanish-language and Portuguese-language websites to attract students from government scholarship programs.

- Traditionally, international schools were the focus of recruitment efforts, but U.S. universities have begun to include prominent national schools to their recruitment list with great success. Military schools, federal institutes of research, and many excellent private schools hosted their first mini fair events in 2014.

- Faculty-led study abroad programs are excellent sources for institutional outreach. Professors and students are welcome to stop by an EducationUSA advising center to meet with local students and talk about their experiences.

- Many higher education institutions in the region have existing institutional agreements that can form the basis of successful recruitment. Promoting short-term programs is a great way to motivate students to return for full degree-programs in the future.

Regional EducationUSA Events

Use the EducationUSA website educationusa.state.gov and country

Western Hemisphere



Facebook pages to find information about upcoming fairs, webinars, and other events and activities. Several EducationUSA advising centers are planning local events during the year.

Contact the WHA REACs if you are interested in participating in adviser trainings, thematic sub-regional workshops, and capacity building workshops for local higher education institutions.

Fairs and Conferences

In addition to the many in-person student recruitment opportunities offered through participation in EducationUSA fairs and conferences, representatives of U.S. institutions often capitalize on these events to ask for a country briefing from EducationUSA advisers, meet with U.S. embassy public affairs and consular staff (subject to scheduling availability), make a presentation at an EducationUSA advising center, and/or visit a local high school or college. Contact the EducationUSA staff organizing the event to explore options for maximizing the impact of your participation.

- **Caribbean:** In addition to independently organized Caribbean College Fairs

that take place in Anguilla, Antigua, Bahamas, Barbados, Bermuda, Jamaica, St. Maarten, and Curacao in late October through early December, EducationUSA Barbados, Trinidad and Tobago, and Jamaica will host fairs featuring large public and research institutions, small liberal arts colleges, historically-black colleges and universities, and community colleges in the fall of 2015 and the spring of 2016. For details on these events, please contact ncac@educationusa.info.

- **Mexico:** On behalf of the U.S. Embassy and the Mexican Ministry of Foreign Affairs, EducationUSA and COMEXUS hosted the first U.S.-Mexico Academic Mobility fair in the fall of 2014. The seven-city circuit attracted approximately 4,000 students. In 2015, the second edition of the tour will take place in two parts: fall 2015, covering Central and Southern Mexico, and spring 2016, covering Central and Northern Mexico, reaching a total of 14 cities and states. If interested, please contact ncac@educationusa.info.
- **South America:** The 2014 South American EducationUSA Fair Circuit took place from August 30 to

September 20. Over 150 universities joined the Circuit with more than 220 representatives traveling to the 11 host cities. Combined, these 11 cities attracted more than 35,000 registrations and more than 25,000 students, and the participation of 152 U.S. HEIs and 221 HEI representatives. The 2015 South America EducationUSA Fair Tour offers two new destinations, Paraguay and Bolivia, and will take place September 23–October 21, 2015. For full details and to register, go to <http://goo.gl/95N8ud>.

- **Central America, Dominican Republic and Haiti:** This year's fall circuit theme is Undergraduate and Summer Programs. Join EducationUSA in Guatemala, Honduras, El Salvador, Nicaragua, Costa Rica, Panama, the Dominican Republic, and Haiti in October 2015. For details, please contact centralamericanfair@educationusa.info.

Center Events

Check with individual centers to learn more about planned activities. Some ongoing highlights include:

- EducationUSA throughout the region conducts webinars focused on aspects of U.S. higher education admissions

or campus life. Contact a REAC or an adviser to coordinate higher education participation.

- EducationUSA advising centers in the region work in conjunction with U.S. Embassies and Consulates to support capacity building at local academic institutions for student-mobility partnerships. EducationUSA Mexico, in partnership with COMEXUS, will host 12 capacity building workshops for higher education institution professionals at the beginner and advanced levels to train international relations office staff on educational advising practices, U.S. government-sponsored programs, and institutional partnership building. EducationUSA Ecuador will organize two workshops to facilitate partnership formation and how to give tips for successful application to the 100,000 Strong in the Americas Innovation Fund grants.
- EducationUSA Peru plans to increase group advising at IB high schools in Lima to help students who are interested in studying in the United States, identify potential Opportunity Funds candidates, and strengthen ties with local schools and school officials.
- EducationUSA Canada continues to organize its monthly webinar series, highlighting topics relevant to the application process. Advisers and students from the WHA region are invited to participate. To present, please contact Ottawa@educationusa.info.
- EducationUSA advising centers throughout the region offer pre-departure orientations, usually in

early July, that are open to any student accepted to a U.S. graduate or undergraduate program. Encourage admitted students to contact an EducationUSA advising center or check the website for upcoming pre-departure orientations.

U.S. Study Abroad in the Region

According to the *2014 Open Doors Report*, Costa Rica continues to be the region's top receiving country with 8,497 U.S. students studying there, an eight percent increase over the previous year, making it the seventh most popular study abroad destination for U.S. students.

Argentina is the leading receiving country in South America for U.S. students, although student numbers decreased slightly in 2012-2013. Mobility should strengthen as more Argentine universities actively recruit U.S. students. Many Argentine universities hope to form partnerships with U.S. universities to teach Spanish and Latin American Studies to visiting U.S. students and solidify Argentina's position as a top U.S. study abroad destination.

In 2012-2013, U.S. students in Brazil increased four percent over the previous year to 4,223, passing Mexico for the second time in history. Portuguese is now the third most studied language in the United States, and a high dollar rate makes Brazil an attractive destination for U.S. students. As a result, more binational centers in Brazil are offering Portuguese and Brazilian culture programs for U.S. students. Watch for a continual increase in numbers because of the partnerships established between Brazilian and U.S. universities through the Brazilian Scientific Mobility Program.

Ecuador and Chile are also leading host destinations in the region, numbers 17 and 21, respectively. Peru ranked 20 with a 10.3 percent increase over the previous year and a 61 percent increase during the last five years. EducationUSA Colombia is seeing a very high level of interest from many U.S. universities, encouraged by the 100,000 Strong in the Americas initiative, even with a U.S. Department of State travel warning still in place. According to Open Doors, the number of U.S. students in Colombia on credit-bearing programs increased by 15.6 percent from academic year 2011-2012 to 2012-2013.

Currently number 15 in the world, Mexico continues to experience a significant decrease in the numbers of U.S. students traveling there for study abroad. Mexican higher education institutions have focused on developing strategies to attract U.S. students and faculty. Similar to U.S.-based state education consortia, several Mexican states have launched initiatives to counteract the negative media image of the travel environment in Mexico, highlighting academic opportunities in regions of the country with no travel warnings. Mexico is the only country with state-by-state warnings. The public and private sectors support diverse short-term programs, including summer programs, service learning opportunities, and internships for traditional and non-traditional students, faculty, and administrators.

Increased mobility from the United States to the Caribbean (5.6 percent) is the result of faculty-led programs, as well as established exchanges between higher education institutions, specifically in health fields, gender, and social issues. The leading receiving countries include the Bahamas, Cuba, Dominican Republic, Haiti, and Jamaica.

EducationUSA advising centers in WHA work closely with U.S. Fulbright grantees and Gilman scholars by providing volunteer opportunities and creating support networks as a way to enrich their experiences in the region. ★

Best Times of Year to Interact with Students

Canada	September–November, January–early March, May
Mexico	September–October, January–early March, May
Central America	January–March, September–October
Caribbean	September–November, January–early March
South America (Andes and Southern Cone)	March–June, August–November

Avoid the two weeks surrounding Easter for all of Latin America and the Caribbean. Carnival in Latin America and the Caribbean, independence celebrations, and the weeks around Christmas and New Year should also be avoided through the region.



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