

EDUCATION & TRAINING SERVICES GUIDE

A Reference for U.S. Educational Institutions

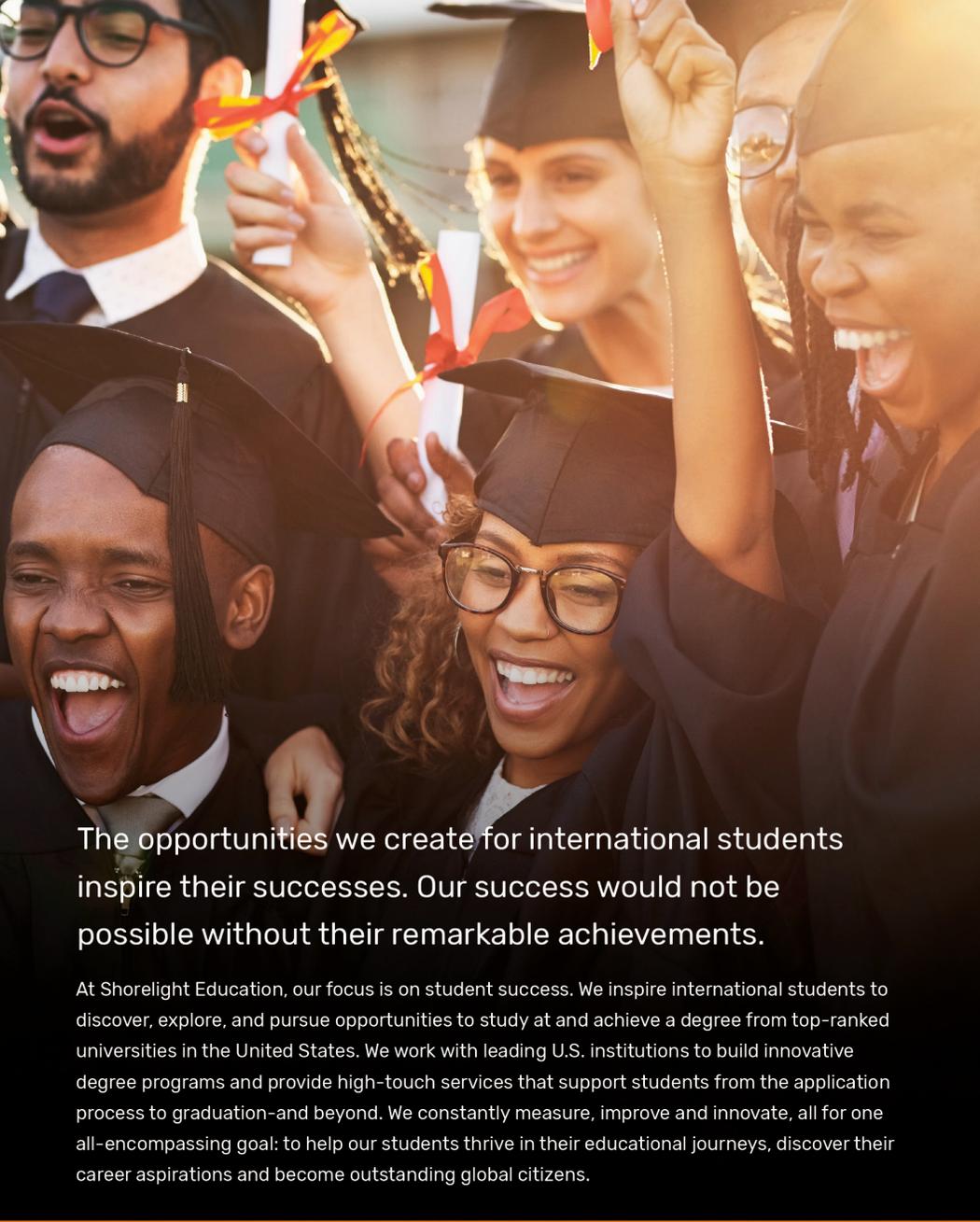
2019 Edition

2019 Edition



EDUCATION & TRAINING SERVICES GUIDE





The opportunities we create for international students inspire their successes. Our success would not be possible without their remarkable achievements.

At Shorelight Education, our focus is on student success. We inspire international students to discover, explore, and pursue opportunities to study at and achieve a degree from top-ranked universities in the United States. We work with leading U.S. institutions to build innovative degree programs and provide high-touch services that support students from the application process to graduation—and beyond. We constantly measure, improve and innovate, all for one all-encompassing goal: to help our students thrive in their educational journeys, discover their career aspirations and become outstanding global citizens.

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CertiFile Credential Verification and Electronic Attachment

Building Trust between International Students and US Institutions

CertiFile™ Credential Verification and Attachment provides a secure and reliable way in which academic records and other documents for students applying to U.S. colleges and universities can be automatically delivered and collated with their admissions application. CertiFile was developed by CollegeNET, Inc., world leader in online admissions services for higher education. This secure web-based service allows applicants to initiate electronic delivery of their verified documents directly through the U.S. institution's online admission application.

Applicants enjoy greater convenience and protection. Secure electronic delivery saves students the time and expense of certified international postage, and eliminates the risks of postal delays, lost documents, and incorrectly collated documents.

U.S. Institutions receive information they can trust. CollegeNET works with trusted source agencies for verification of all academic transcripts, credentials and other documents. The company's preferred sources for document verification are government agencies, higher education institutions, and officially authorized verification companies. Not only does CertiFile ensure accuracy of the student credentials, it eliminates an important bottleneck for the receiving institution: matching a student's verified credentials with their electronic admissions application.

Current CertiFile verifying partners include:

CHESICC (www.chsi.com.cn/en/), a division of the Chinese Ministry of Education (for Chinese students or students who have studied in mainland China)

Educational Perspectives, a non-profit public service organization and NACES member providing foreign credential evaluations (for students requesting documents from schools outside of China)

CertiFile provides electronic document request, verification, and delivery of:

(For Chinese students; through CHESICC):

- Higher Education Records and Transcripts
- Higher Education Degree Certificate Verification
- Gaokao Scores

(For all other international students; through Educational Perspectives):

- Higher Education Records and Transcripts
- Secondary Education Records and Transcripts
- Credential Evaluation

For information, contact: internationalsales@collegenet.com



Introduction

According to the latest data released by the U.S. Department of Commerce's Bureau of Economic Analysis, education service exports ranked 5th among service exports in 2018. During the 2017/2018 academic year the U.S. hosted over one million students, and reported \$45.3 billion in education exports, which supported over 455,000 U.S. jobs. U.S. colleges and universities play an important role in helping foreign governments partner with private industry to fulfill vital education and training needs. The Organization for Economic Co-operation and Development (OECD) report estimates that 8 million students will be studying abroad by 2025.

Education services is a critical element of our trade relationships with countries worldwide. Promoting study in the United States strengthens our economic development through innovation, workforce development, and attracting foreign direct investment. There are enormous challenges and opportunities for U.S. international education around the world. Increasing trade and investment opportunities for U.S. educational institutions and entities is, therefore, a top priority at the U.S. Commercial Service, the export promotion arm of the U.S. Department of Commerce's International Trade Administration.

This 2019 U.S. Commercial Service Education and Training Services Resource Guide is an important tool to assist U.S. institutions with identifying new international market opportunities. The Guide provides a detailed analysis of the education sector in over 45 countries, covering trends, demand and more. It also includes comparable market assessments of countries listed as best prospects for U.S. training and educational services to make it easy for institutions to see which markets represent the greatest opportunities for their specific programs. The country assessments are based on the expert observations and market research reports created by U.S. Commercial Service education sector specialists worldwide. For additional information or education market research, please visit export.gov/industry/education.



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What Can the U.S. Commercial Service Do for You?

The U.S. Commercial Service (CS) is the export promotion arm of the U.S. Department of Commerce's International Trade Administration. Our global network of more than 1330 trade professionals is located throughout the United States and in U.S. Embassies and Consulates in more than 75 countries. Whether you are looking to recruit your first international student or expand your recruitment efforts to additional countries, we offer the expertise you need to assist with your international outreach to students, potential partners, and agents.

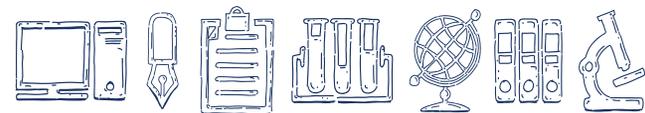
How We Can Help Your Institutions:

The CS Global Education Team works to help connect you to high school counselors, agents, and potential partner universities, recruit international students, and meet with companies or government entities that require specialized training. Our team can also assist with your educational state consortia efforts and overseas promotion. This resource guide is just one of the ways we can provide the information you need to set priorities and plan for international outreach. For more information on how CS can help your education institution or Intensive English Program increase its international student enrollment, please visit export.gov/industry/education and contact your local CS office. A list of offices appears at the back of this guide and at export.gov/usoffices.

- **Gold Key Matchmaking Service** • Meet the best high schools, universities, agents, and other partners.
- **Single School Promotion** • Set up an event featuring your educational institution and meet key players in the international education field.
- **International Partner Search** • Find qualified partner schools, agents, and other educational organizations.
- **Trade Fairs and Catalog Shows** • Identify the right international education fairs for your institution.
- **International Market Research** • Receive market research reports on target markets around the world.
- **Trade Missions** • Attend a trade mission for high level visibility among key market contacts.
- **Virtual Education Fairs** • Connect with agents using webinar technology—without leaving your office.
- **Education Trade Leads** • Learn first-hand about interest in services from overseas organizations

For additional information or education market research, please visit export.gov/industry/education.

MARKET BRIEFS





ANGOLA

Capital: Luanda
Population: 30,355,880 (July 2018 est.)
GDP: \$126.5 billion (2017 est.)
Currency: Angolan kwanza (kw: AOA)
Language: Portuguese (official)

UNESCO Student Mobility Number:

Angola has 12,747 students studying abroad according to UNESCO, an increase of 9.38 percent compared to 2016 statistics.

CIA World Factbook:

66.40% of the Angolan population is under 24 years old.

OVERVIEW

Overburdened classrooms, decaying infrastructure, few qualified teachers, outdated teaching methods and learning materials such as textbooks and manuals, are major causes hindering the delivery of good quality education services.

Inadequate education has contributed to a decrease in the number of skilled workers and to the opening of small private institutions that deliver short-term courses in specialized areas.

While the Angolan Government is combating illiteracy, it is also committing to education reforms at all levels and capacity building of teachers, to develop a more enriched and relevant curriculum.

With about 50 percent of the population under the age of 22, the demand for education is exceeding local supply. There are very few public and private institutions to adequately accommodate Angolan's youth population. Hence, there is a high demand for good quality education and training services. Angolan families with financial capabilities opt for study abroad for better quality education. Top five destinations include Brazil, Portugal, the U.S., Namibia and South Africa. U.S. represents 10.97 percent market share of the study abroad market segment, and this market share can grow if more Angolans have access to foreign currencies.

Since 2015, significant decline in the Angolan economy has reduced Angolans' access to U.S. dollars to pay for tuition fees and living expenses. Holding sufficient Angolan currency has not guaranteed access to study abroad. A shortage of foreign currency reserves has significantly limited international payments.

In two consecutive years, 2017 and 2018, the Institute of International Education reported a decrease in the number of Angolans attending tertiary education in the U.S. During the 2017-2018 academic year, only 1,183 Angolans were enrolled in U.S. higher learning institutions, a 6 percent decrease from the previous academic year 2016-2017.

SUB-SECTORS

Higher Education

The total number of Angolans studying in the U.S. has been declining since the economic recession. According to the Institute of International Education, 1,183 Angolans enrolled at a U.S. higher learning institution during the 2017-2018 academic year; 85.4 percent of Angolans were enrolled in undergraduate courses; 7.4 percent were in graduate programs; 4.4 percent pursued non-degree courses; and, 2.9 percent Optional Practical Training.

Undergraduate

According to 2018 statistics from the Open Doors Institute of International Education 2018 report, 85.4 percent of Angolans studying in the U.S. enrolled in undergraduate courses. Opportunities reside for community colleges with preferences for public institutions.

U.S. colleges and universities can work with multinationals such as Chevron, Exxon Mobil, BP, Total and Sonangol, the Angolan national oil company, as strategic partners to recruit Angolans for undergraduate study and intensive English language courses. Leading oil and gas multinationals include in their employees' compensation plans international educational opportunities for their children in the U.S. or elsewhere.

Graduate Education

Attendance in graduate courses by Angolans in the U.S increased by 17.6 percent in the 2017-2018 academic year, but the number continues to be far below enrollment numbers in undergraduate courses.

SECONDARY EDUCATION

Boarding School and High School Demand

The Angolan educational system is comprised of the primary school, middle and high schools as secondary education. The service is provided by public and private institutions. Public education is free of charge; however, capacity is limited to absorb the demand of this age group.

There are a few international private schools funded by different international companies or by diplomatic missions that provide teaching from pre-school to secondary school. Tuition fees are very high but may be discounted or even fully paid for employees of the funding companies.

The American Schools of Angola, a branch of the Calvert Academy High School, is Maryland State Department of Education accredited, and opened its doors in 2017 to offer a U.S. education to primary, middle and high schools students in Angola at their two Luanda campuses.

Luanda International School (LIS) is an International Baccalaureate School and accredited by the New England Association of Schools and Colleges (NEASC). LIS provides U.S. education services in English for the primary, middle and secondary schools.

There is a demand at all levels for quality education including intensive English programs for secondary students provided locally within public and private high schools or in the U.S. during winter or summer camps. There are also opportunities for boarding school enrollment in the U.S. as well as opening of campuses in Angola that offer U.S. educational curricula.

The new Angolan government administration recently made English compulsory for students at all levels.

Online Programs

Some Angolans take the challenge to pursue online programs particularly graduate courses.

Research and Development

The National Center for Scientific Research (CNIC), under the Ministry of Science and Technology, oversees scientific research.

Investment in scientific research in Angola remains minimal due to both limited state budgetary allocations and available private financing. Limited investment in scientific research has resulted in a lack of proper conditions or institutional structures to conduct research (laboratories, legal statutes governing the activity, School of Social and Human Sciences). As such, there is a visible absence of scientific research components and research competency in higher education in Angola.

Professional Training Services

U.S. colleges and universities can also target the professional training and capacity building segment in various sectors such as in oil and gas, healthcare, banking, insurance, commerce, computer science, and education as referred to earlier.

English language skills are becoming increasingly more important for Angolans seeking to distinguish themselves in the employment market. English is now effectively the business language, especially in the oil and gas industry, which dominates the Angolan economy. To advance in their careers, professionals need technical English courses in their field of interest, for instance, business English, English language for lawyers or English language for healthcare.

OPPORTUNITIES

Cost is the primary consideration for Angolans deciding to study abroad. U.S. colleges and universities with low tuition fees and located in areas with affordable living costs will have a competitive advantage as families mostly bear funding obligations for study abroad for Angolans. Most Angolans consider tuition fees in the median of US \$ 20,000.00 affordable.

U.S. colleges and universities may also consider offering alternative financing options such as grants and scholarships particularly at an undergraduate level to attract Angolan students.

U.S. colleges and universities wishing to penetrate the Angolan market should partner with the Ministries, trade associations, recruiters and alumni in Angola in order to increase visibility; to design study abroad programs, exchange programs and English preparatory programs which will promote active recruitment of Angolans.

EVENTS

EducationUSA College Fair is held in Luanda on an annual basis.

RESOURCES

- EducationUSA - <https://educationusa.state.gov/>

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AUSTRALIA

Capital: Canberra
Population: 23,470,145 (July 2018 est.)
GDP: \$1.38 trillion (2017 est.)
Currency: Australian dollars (AUD)
Language: English

UNESCO Student Mobility Number:

Australia has 12,713 students studying abroad according to UNESCO.

CIA World Factbook:

30.37% of the Australian population is under 24 years.

OVERVIEW

Australian students are increasingly choosing to pursue university degrees abroad. A unique mix of professional, academic, athletic, and social opportunities available within American schools has made the United States one of the most attractive destinations for these students. Although many American university administrators often overlook Australia during international recruitment efforts, the confluence of these trends creates an unprecedented opportunity to boost international student enrollment on American campuses. Furthermore, the numerous Asian students who attend American universities after graduating from Australian high schools renders student recruitment in Australia an increasingly attractive proposition.

SUB-SECTORS

Higher Education

There is a broad academic and geographic distribution of Australians at US universities.

Undergraduate

Undergraduate Australian students tend to focus on the liberal arts and sciences, business, international relations, film, or art. Australia has many accomplished athletes and many Australian student athletes are interested obtaining athletic scholarships to universities in the United States.

Graduate Education

Graduate students generally pursue law, business management, or the advanced science.

OPPORTUNITIES

Over the past five years, Australian students pursuing US education programs has increased 19 percent. A total of 4,908 Australian students studied in the United States in the 2017-18 academic year, a -0.5% decrease compared to the previous year. 2,488 Australian students pursued an Undergraduate degree, an increase of 3.8% on the previous year and 1,139 pursued a Graduate degree, a decrease of -4.8%.

Australia and the United States have similar education systems, so Australian students can transition relatively seamlessly. Australian students are attracted to the unique characteristics of US university life: collegiate sports, interdisciplinary/liberal arts degrees, and life within a close-knit campus environment.

EVENTS

The EducationUSA offices in Australia support a number of education fairs held in Australia throughout the year:

- <https://au.usembassy.gov/education-culture/educationusa-australia/contact-educationusa-australian-offices/>
- <https://educationusa.state.gov/centers/us-consulate-general-sydney>
- <https://educationusa.state.gov/centers/us-consulate-general-melbourne>
- <https://educationusa.state.gov/centers/us-consulate-general-perth>

RESOURCES

- EducationUSA Australia - <https://au.usembassy.gov/education-culture/educationusa-australia/>

U.S. COMMERCIAL SERVICE CONTACT

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AUSTRIA

Capital: Vienna
Population: 8,793,370 (July 2018 est.)
GDP: \$417.4 billion (2017 est.)
Currency: Euro
Language: German (official)

UNESCO Student Mobility Number:

Austria has 17,603 students studying abroad according to UNESCO.

CIA World Factbook:

24.82 % of Austria's population is under 24 years of age.

OVERVIEW

Austria is located in the heart of Europe surrounded by Czech Republic, Germany, Hungary, Italy, Liechtenstein, Slovakia, Slovenia and Switzerland. It enjoys a strong social system, economic stability, a high quality of life, and a rich culture.

Austria's education system ranks among the top countries worldwide. Its high-quality education produces a large pool of highly qualified candidates who are competitive candidates for undergraduate, graduate and specialized studies in the United States.

The country ranks fourth in the 2017 IMD World Talent Report, with apprenticeships and employee training well developed in the national educational programs. The goal of lifelong learning is highly integrated in the Austrian education system. This is partly due to the Austria's strong investment in its education system, ranked 6th in the world for expenditure on education per pupil. Furthermore, Austrian teachers' statutory salaries are among the highest across the OECD countries at all levels of education. Austria enjoys a free public-school system with generally no tuition fees for education through the 9th semester of university.

SUB-SECTORS

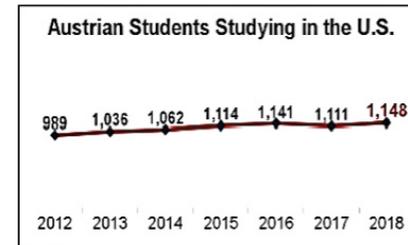
Higher Education

Austria has 70 universities including public universities, 12 private universities, 6 universities of arts, 3 medical universities, 22 universities of Applied Sciences and 14 University Colleges of Teacher Education. A total of 353,200 students study in universities throughout Austria with 25% of these international students, mostly from neighboring countries.

University studies are free for all EU students through the 9th semester, after which students must pay EUR 363,36 per semester fees. For non-EU citizen students, tuition fees of EUR 726,72 per semester apply. Some universities and institutes require entrance exams in addition to a diploma. Austria's relative spending on university education is among the highest according to OECD. The rate of completion of university degrees at about 39% is slightly higher than the OECD average of 38%.

According to the 2018 IIE Open Doors Report, a total of 1,148 Austrian students are studying in the U.S. led by undergraduate, non-degree then graduate programs as presented below. Austrian student enrollment in U.S. academic programs are up 4% in 2018 with leading receiving U.S. states: New York, California, Massachusetts, Illinois and Florida.

Students in U.S. by Academic Level	%	Number	% Change (2017 to 2018)
Undergraduate	34.7%	398	1.0%
Graduate	26.7%	306	-1.6%
Non-Degree	29.0%	333	13.3%
OPT	9.7%	111	-0.9%



SECONDARY EDUCATION

Austria has over 2,000 high schools with around 610,000 students enrolled. School attendance is mandatory for nine years, including four years of elementary school. Adult education starts after this time when students are tested into and select either an academic track toward university or a vocational/apprenticeship track that leads to an industry specific training such as mechatronics, metal technology or architectural glass technology. Around 40% of Austrians choose apprenticeship programs for their education path.

A number of high schools offer international oriented programs including International Baccalaureate providing an attractive student base for international study recruitment.

Online Programs

E-learning is a growing trend especially for university and adult learners. Several Austrian institutions have established international partnerships involving e-learning infrastructure and joint programs.

In 2016, around 400 students graduated from e-learning courses, a trend that is expected to increase as many working professionals also participate in part-time online courses as part of their professional development.

VET Vocational Education and Training / Apprenticeship

Austria is well known for its approach to vocation education and training (VET), which is characterized as a practical training combined with general education. VET is a core element of the Austrian educational system. Initial vocational qualifications can be obtained by attending a dual VET program (apprenticeship and part-time vocational school) or through full-time schools.

Austrian companies are heavily involved in apprenticeship training, ensuring that the training portion in the apprenticeship system is directly responsive to a company's skill needs. This is

one of the key factors contributing to the competitiveness of Austria's economy.

The Austrian Ministry of Science, Research and Economy cooperates with other institutions involved in apprenticeship training including the Austrian Federal Economic Chamber and committed companies on a permanent basis to modernize the dual training system.

OPPORTUNITIES

The U.S. is the 3rd most popular study abroad destination for Austrian students, according to UNESCO, followed by U.K. and Switzerland. Based on data from the Institute of International Education, the number of Austrian students in the United States has increased by almost 10% in the last five years, to exceed 1,000 students.

Austria offers excellent opportunities for U.S. educational promotion. Austrian students tend to be academically well-prepared and have excellent English skills. They are interested in a broad range of academic fields in the U.S., including STEM especially at the graduate level, liberal arts programs which are not offered at local universities, and professional degrees.

Establishing cooperation with local universities is a very effective way to enter the Austrian market. Exchange programs, which are usually a semester long, are highly attractive to Austrian students. U.S. universities need to know that once an exchange program has been established, they also need to send a similar number of American students to Austrian universities.

Intensive English Language Programs and other forms of short-term exchanges are very popular as the value of English in the world of business continues to grow. Short, non-degree programs very successful as well, not only for university students, but also for working professionals, who seek to further develop their professional skills. E-learning is a trending strategy to attract Austrian students as well as full-time professionals who desire to study further. The ability to earn college credits through online study is gaining popularity in Austria.

GRANTS AND SCHOLARSHIP PROGRAMS

The Austrian Agency for International Cooperation in Education and Research (OEAD) coordinates information related to scholarships and research grants available to Austrian students. According to the agency, there are around 50 million Euros available for scholarships and grant programs allowing students to finance their studies in Austria and internationally. Students apply for these grants through their local universities. Upon approval, they can study abroad at their school's international partner university. This funding path for international study underlies the importance for U.S. universities to develop close cooperation with Austrian universities as a strategy to attract Austrian students.

EVENTS

The U.S. Commercial Service and the organizers of the largest education fair in Austria "BeSt³" are offering U.S. universities the opportunity to participate in the USA Pavilion at BeSt³ March 7-10, 2019 in Vienna. With over 75,000 visitors, the BeSt³ student fair will feature U.S. institutes and provide them with high level visibility in the Austrian market. The fair will also help facilitate direct contacts with Austrian high school and university students, as well as with local potential partners. EducationUSA and Fulbright Austria are close collaborators in this program.

LARGEST STUDENT FAIR IN AUSTRIA -- BEST³ STUDENT FAIR

Vienna, Austria
7 - 10 March 2019
<https://bestinfo.at/en/>

RESOURCES

- Education USA: <https://educationusa.state.gov/>
- Fulbright Austria: <http://www.fulbright.at/>
- OECD: <http://www.oecd.org/>
- IIE: <https://www.iie.org>
- IMD: <http://www.imd.org/>
- UIS UNESCO: <http://uis.unesco.org/>
- Federal Ministry of Science, Research and Economy: <https://www.bmbwf.gv.at/english/home/>
- "Österreichischer Austauschdienst OeAD" – Austrian agency for international mobility and cooperation in education, science and research: <https://oead.at/en>
- Austrian Grants: <https://grants.at/>

U.S. COMMERCIAL SERVICE CONTACT

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BRAZIL

Capital: Brasilia
Population: 208,846,892 (July 2018 est.)
GDP: \$2.055 trillion (2017 est.)
Currency: Reals (BRL)
Language: Portuguese (official)

UNESCO Student Mobility Number:
 Brazil has 52,515 students studying abroad.

CIA World Factbook:
 38.18% of the population is under 24 years old.

OVERVIEW

Despite the current economic/political challenges that Brazil is going through, it is the fifth largest higher education market in the world and the largest higher education market in Latin America. Education expenditure for 2018 was around US\$ 12 billion. The Brazilian Ministry of Education’s budget for 2019 is projected to be US\$30 billion.

Brazil has 57 million students in its basic education system, with 8.7 million in pre-school, 37.2 million in elementary school and 11.1 million in high school. The higher education sector includes 7.3 million enrolled students. Approximately 72 percent of higher education students go to private institutions.

The education sector is a high priority for the Government of Brazil. The internationalization of higher education is a subject that is gaining increasing relevance both for public and private Brazilian Higher Education Institutions. Brazilian federal research agencies have a long history of supporting international research partnerships, and such bilateral agreements with various countries in Europe, North and Latin America have existed for decades. However, available English language courses at Brazilian universities are still limited but growing.

In contrast to the segment for primary education, private institutions dominate higher education in Brazil. Public institutions in Brazil are small and are not capable of meeting the overall demand for higher education courses. Public higher education institutions are directed to serve as centers of excellence and research, with extremely competitive admissions standards and a limited capacity for expansion. Private higher education institutions are focused on meeting the professional requirements of the labor market and have developed flexible programs to meet the needs of the working population.

Industry specialists such as Hoper Education expect that despite the challenging economic/political situation, the education sector in Brazil will continue to grow, particularly the distance-learning segment. The lower monthly tuition fees in distance learning are expected to increase the penetration of higher education in Brazil. Distance learning solutions are particularly attractive to the substantial number of private, for-profit universities in Brazil. According to the Brazilian Association of Distance Learning (ABED), out of the 226 institutions that offer distance-learning classes, 64 percent are private, while 36 percent are public.

SUB-SECTORS

Higher Education

Brazil ranks tenth as a country of origin for foreign students studying in U.S. universities. In the 2016-17 academic year, 13,089 students from Brazil were studying in the United States. The breakdown was as follows: 50.3 percent undergraduate; 28.8 percent graduate students; 8.9 percent other (language, short-term non-degree programs, etc.), 12.0 percent OPT (Optional Practical Training).

Non-recognition of foreign university credits toward earning a degree in Brazil is a barrier to U.S. education exports. The Ministry of Education is in the early stages of creating a system to recognize foreign university degrees. Once the system is established, foreign universities will have to register to be included on the certified list; this is intended to be a fast-track system for students to have their foreign diplomas recognized. For continuing education purposes, the private universities have authority to work on case-by-case diploma acceptance.

Despite the bureaucratic challenges of having U.S. degrees recognized in Brazil, the number of Brazilian students choosing U.S. education is significant. The economic impact of Brazilian students in U.S. colleges and universities contributed \$477 million to the U.S. economy during the 2017/18 academic year last year.

Approximately 80 percent of Brazilian students who study abroad come from Brazil’s southern and central eastern states (São Paulo, Santa Catarina, Rio Grande do Sul, Paraná, Rio de Janeiro, Brasília and Minas Gerais). Among these states (each of which presents excellent opportunities for overseas recruitment), São Paulo, Brasília, and Rio de Janeiro represent the three best locations to recruit Brazilian students to study in the United States. São Paulo has the largest applicant pool (33%) and attracts the most talented students to its own university campuses. The capital city of Brasília (11.6%), located in Distrito Federal (Federal District) has the country’s highest GDP per capita at approximately \$16,500, over twice that of São Paulo, the region with the second-highest GDP per capita. The state of Rio de Janeiro (13.4%) (the country’s hub for the oil and gas industry) attracts many engineering and science majors.

English as a Second Language Programs

Brazil recognizes the need to improve English language skills across the country. Most of the population (including those employed in the tourism sector) lack basic English language skills, which is the main challenge for many Brazilian students applying for study abroad programs. Institutions that can address this issue by providing conditional acceptance tied to English language training or other “pathway programs,” may have a competitive advantage in attracting Brazilian students.

Short-term Programs

Although private English language schools are abundant, student exchange programs are a huge market in Brazil, especially short-term and part-time programs. Examples of exchange programs currently popular in Brazil include part-time study programs combined with tourism and outdoors sports; teen vacation (specifically for teenagers with a mix of classes and leisure activities) and English language programs designed for 50+ year old students.

OPPORTUNITIES

For the next decade, the fastest growing segment of the educational market in Brazil will be short-term vocational and English learning courses, due to government investments in technical schools and courses for high schools’ students and adults.

EVENTS

Education fairs are one of the most efficient means to recruit individual Brazilian students, including the biannual [EducationUSA](#) roadshows, supported by the U.S. Department of State's Bureau of Educational and Cultural Affairs (ECA). The roadshow happens on the first semester of the year and the EducationUSA fair happens on the second semester of the year. Universities interested in participating and exhibiting at the fairs should contact the EducationUSA office in Brazil.

[Study Travel](#) - ALPHE Conferences – March 13-15, 2019 – São Paulo – The Conference creates an environment for networking between international educators and student recruitment agents.

[Salão do Estudante](#) – March 16 – 30, 2019. Large international student recruiting fair. Approximately 26,000 visitors over 7 cities (São Paulo, Rio de Janeiro, Brasília, Belo Horizonte, Salvador, Porto alegre and Curitiba). This year, the United States will be the Country of Honor!

[FAUBAI Conference](#) – April 13 – 17, 2019 – Belém – The Brazilian Association for International Education (FAUBAI) meets annually to promote the improvement of exchange programs and international cooperation as a means to improve teaching, research, extension and administration of affiliated institutions, seeking to stimulate the continuous improvement of the management of international exchange and cooperation.

[Bett Brasil Educar](#) – May 14 – 17, 2019 – São Paulo – This show represents the best annual opportunity to exhibit classroom technology and furniture in Brazil. The main objective of Bett Brasil Educar is to provide an enabling environment for network, business and present solutions to improve the quality of the Brazilian education. *The Department of Commerce is organizing a Certified Trade Mission to participate at this Conference. More details with Amy Freedman, US Commercial Service – Cleveland: Amy.Freedman@trade.gov*

[ICEF](#) - September 30 – October 02, 2019 – Rio de Janeiro – This workshop provides an opportunity for international educators from all sectors to consolidate existing partnerships as well as establish new ones with quality, screened student recruitment agents. This is the largest event of its kind in Brazil.

RESOURCES

U.S. Government:

- [Foreign Commercial Service Education Team](#)
- [Education-Brazil Top Markets Report](#)
- [EducationUSA Brazil](#)
- [Department of Commerce U.S. Educational Institutions and Intensive English Programs](#)

Government of Brazil:

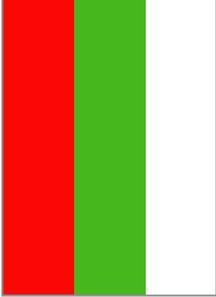
- [Brazilian Ministry of Education](#)
- [Language without Borders](#)
- [FNDE](#)
- [Proinfo](#)

Other:

- [Institute of International Education - Open Doors](#)
- [Belta – Brazilian Educational and Language Travel Association](#)
- [Anima Educação](#)
- [Top Universities - rankings](#)

U.S. COMMERCIAL SERVICE CONTACT

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BULGARIA

Capital:	Sofia
Population:	7,057,504 (July 2018 est.)
GDP:	\$56.94 billion (2017 est.)
Currency:	Leva (BGN)
Language:	Bulgarian (official)

UNESCO Student Mobility Number:

Bulgaria has 23,945 students studying abroad. Top 3 destinations for Bulgarian students are U.K., Austria, and Denmark.

CIA World Factbook:

24.03% of the population under 24 years of age.

OVERVIEW

On one hand, being part of the EU has greatly improved the mobility opportunities for Bulgarian students and nowadays significant amount of young people choose to continue their higher education abroad. Some EU countries provide free university education and many incentives for EU member countries. On the other hand, Bulgarian students are not that informed for the U.S. as an educational destination in comparison to the European universities which are spending a substantial amount on information campaigns and expos promoting their universities.

According to latest data from Eurostat, Bulgarian government expenditure on education is 4.0% of GDP. Education costs in Bulgaria are one of the lowest in the EU as only EUR 250 (USD 286) are spend on average per inhabitant.

As a member of the European Union, Bulgaria can benefit from various programs. To help develop and strengthen innovations in higher and general education, as well as vocational training, Operational Program Science and Education for Smart Growth covers 2014-2020 period. The fund amount exceeds approximately USD 770 million and it is expected to advance the students opportunities for knowledge, skills and competencies by supporting laboratories and pilot centers, different activities and scholarships.

SUB-SECTORS

Higher Education

2018 Open Doors Reports shows that percentage of Bulgarian students in the U.S. is decreasing with 11.1%, as for the academic year 2017/2018 their number is 826. In comparison, for 2016/2017 academic year, there were 929 Bulgarian students in the U.S., and in 2015/2016 – 1,016.

The only U.S. university in the country -- the American University in Bulgaria (AUBG) – is located in the cities of Blagoevgrad and Sofia. It offers excellent service to international students and strong academic programs. Since its opening in 1991 AUBG has consistently ranked number one among universities in Bulgaria for its Business Administration, Management and PR/Mass Communication programs. AUBG has approximately 1000 students. In 2017 AUBG started the first Executive Master program in Banking, Finance and Real Estate as a joint venture program with together with SDA School of Business Bocconi University in Italy.

Colleges

There are total of 54 higher school institutions in Bulgaria. 22 out of 54 are colleges for professional education in sectors such as tourism, business and management, and marketing. College education in Bulgaria is approximately 3 years long, as some institutions provides diplomas equivalent to universities.

Secondary Education

Another American education institution is The American College of Sofia (ACS) - a secondary school based in the capital Sofia. The college was founded in 1860 and it is one of the oldest American educational institution outside the United States. Every year the ACS students score the highest results for the final state exam.

New trends in the secondary education is the so-called distance learning platforms. American High School in Varna partners with Florida-based school to provides an online program that gives the opportunity to get an American diploma by taking only courses that are required by the State of Florida's Education Department. When enrolled in the American High School program, students are able to sign up for the whole gamut of middle and high school subjects which vary from English literature, to business, to programming, to psychology and anthropology.

Most Bulgarian students wanting to study abroad are proficient in English and are usually very well-prepared academically which facilitates their learning experience abroad. About 98% of the high school students study a foreign language (usually English) and 73% study a second language (mainly German, French, Spanish, Russian).

Online Programs

Online Programs are not so popular in Bulgaria, but more universities such as Sofia University, Varna University and New Bulgarian University already provides online education. Online programs are alternative for many students with full-time jobs. The prices for these programs vary from USD 700 to USD 5,000 per year.

Research and Development

Another EU funded program, besides the Operational Program, is Research and Innovation Performance and Horizon 2020, which is focused on national research programs and innovation systems. Research and Development investment is mainly supported by the private business in Bulgaria. For 2015, 0.96 % of GDP are spent for R&D, less than 0.4% are public spending. The goal of Horizon 2020 programme is 1.50% of GDP by 2020, equally separate by government and business.

OPPORTUNITIES

Intensive English Language Programs / Short-term Programs

Summer programs for both students and adults as well as programs in business administration; Work, Study and Travel programs; e-learning; and undergraduate and graduate degrees.

Summer courses in the U.S. and year-round could present good opportunities for U.S. universities and schools looking to attract Bulgarian students. The summer English language programs are suitable for local students and fit well with Bulgaria's semester structure.

Online Courses/ Distance learning courses are getting more popular among younger generation students.

Educational consulting agencies in Bulgaria provide great assistance to Bulgarians who plan to study abroad. These consulting agencies inform students about requirements, documentation and facilitate the whole process and include such entities as Darbi ESH Study Abroad, “Connect with USA”, Orange Education, Skylines Ltd., Integral Educational Programs Ltd., and more.

To assist U.S. universities in sharing ‘their story’ to South East European (SEE) college students - CS Sofia organized two regional virtual educational fairs (VEF) - in April 2015 with the Commercial Service and U.S. Embassy in Budapest, Hungary and in March 2016 with reps from Bulgaria, Romania, Serbia, Croatia, Greece and Ukraine. In 2017, VEF was organized together with Albania, Macedonia, Romania and Slovenia, attracting educational consultants, universities representatives, and high schools’ representatives.

EVENTS

WEBA Education Fair, Feb 17, 2019, <http://www.webaworld.com/student-fairs-events/europe/37.php>
 World Education Fair, in Sofia; Feb. 23 - 24, 2019, <https://www.world-education.eu/en/>;
 Education Beyond Borders, Mar. 15 – 16, 2019, <http://edu-fair.info>;
 European Education Fair, Mar 16 - 17, 2019, <https://www.edlanta.com/eef>;

RESOURCES

- EducationUSA <https://educationusa.state.gov/>
- Ministry of Education and Science: <https://www.mon.bg/en/>
- Fulbright Commission: <http://www.fulbright.bg/en/>
- National Statistics Institute: <http://www.nsi.bg/en>
- OP Science and Education for Smart Growth 2014-2020: <http://sf.mon.bg/?go=page&pageId=84>
- Horizon 2020: <http://horizon2020.mon.bg/en>
- American University in Bulgaria: <https://www.aubg.edu/>
- American College of Sofia: <https://www.acs.bg/>
- Eurostat: <https://ec.europa.eu/eurostat>

US COMMERCIAL SERVICE CONTACT

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CENTRAL AMERICA

Number of Students studying abroad per UNESCO Student Mobility Statistics:

Costa Rica	2,843
El Salvador	4, 416
Guatemala	3,495
Honduras	4,593
Nicaragua	3.555

Percent of Population under 24 years of age per CIA World Factbook:

Costa Rica	38.37%
El Salvador	45.18%
Guatemala	54.78%
Honduras	53.25%
Nicaragua	47.32%

OVERVIEW

The United States is a leading destination for international students from Guatemala, Honduras, El Salvador, Costa Rica, and Nicaragua. The number of Central Americans enrolled in U.S. higher education institutions reached a total of 6,419 during the 2017/18 academic year, representing a 0.6% increase over the previous year. Among the top receiving States are: Texas, Florida, Louisiana, California, New York, Massachusetts, Georgia and Virginia.

Number of international students per country and academic level:

Place of Origin	Academic Year 2017/18	Undergraduate	Graduate	Non-degree	OPT
Costa Rica	1,146	549	414	34	149
El Salvador	1,554	1,172	174	75	133
Guatemala	1,206	786	255	40	136
Honduras	2,104	1,477	354	87	186
Nicaragua	409	235	99	29	46
TOTAL	6,419	4,219	1,296	265	650

Source: 2018 Open Doors Report

Key reasons why Central American students choose U.S. Higher Education Institutions:

- Geographic proximity
- High quality education system
- Wide variety of institutions and higher education programs
- Good and diverse living environments; possibility of living with relatives while studying
- Availability of intensive and short English Programs to learn or improve English skills

In addition, studying abroad represents an opportunity to be more competitive and increases the possibility for better employment in national or multinational corporations. Main competitor countries hosting students from Central America are Canada, Mexico, Spain, Germany, France, Taiwan (except for El Salvador), United Kingdom, Chile, and Argentina.

Central Americans in general are interested in scholarships and financial aid when evaluating universities. Community College degrees represent an opportunity due to lower tuition fees and simplified application procedures.

Undergraduate programs are preferred, followed by graduate studies. English language programs have strong potential as there is low to moderate English proficiency in most of the region. Although, Costa Rica has a comprehensive program to become a bilingual country, it is ranked #36 in the 2018 EF English Proficiency Index (which evaluates the English skills of 88 countries worldwide), followed by Guatemala in position 55.

According to the 2018 Open Doors Report, a total of 406 students from Central America participated in Intensive English Programs in the United States, including 153 from Honduras followed by El Salvador (110), Guatemala (103), Costa Rica (56) and Nicaragua (39).

SUB-SECTORS

Higher Education

Central American students are primarily attracted to the following degree programs in the U.S.:

- Universities and Community Colleges with tuition fees lower than \$20,000
- English Language Programs (from 1 month up to 1 year) for students, teachers, and adults
- Summer camps
- Undergraduate, Graduate and Master Programs
- Online programs

In 2018, El Salvador ranked #24th among the top 25 places of origin of international students attending Associate's Institutions.

Among the top fields of study and majors are Social Sciences (Business & Law), Education, Engineering, and Health & Social Sciences.

OPPORTUNITIES

The "100,000 Strong in the Americas" Initiative, announced by President Obama in 2011, represents an opportunity to increase the number of exchange students between Central America and the United States. All U.S. Embassies and EDUCATION USA offices in the region are committed to work with the business community to promote professional development and increase the number of students studying in the U.S. Through grants competitions, the 100K Strong in the Americas Innovation Fund provides funds for innovative partnerships between U.S. and Latin American and Caribbean institutions of higher education.

On July 2017, Honduras launched the government sponsored Presidential Program for International Scholarships "Honduras 20/20," aimed at supporting graduate studies abroad for students with academic excellence. The program gives priority to areas under the economic development program "Honduras 2020," which seeks to generate 600,000 new jobs and sharply boost exports by expanding and adding value to key investment sectors including textiles, manufacturing, tourism, and business services.

To enter the Central America market, it is highly recommended for U.S. universities, community colleges and/or technical institutions to:

- Seek partnerships or agreements with public or private universities to facilitate exchange programs for students and professors, recognition of credits and/or dual certification.
- Travel to the market to meet face to face with school counselors, parents, and higher education institution officers.
- Participate in local recruitment campaigns, fairs, trade missions, and outreach events in high schools, public venues, and universities.
- Provide in depth information about programs and the application processes
- Describe opportunities of scholarships and financial aid
- Provide information on the process to obtain a U.S. student visa

It is preferred that all marketing material and program information is available in Spanish.

EVENTS

Please reach out the U.S. Commercial Service contacts below for a list of events/activities in each location.

RESOURCES

EducationUSA <https://educationusa.state.gov/>

U.S. COMMERCIAL SERVICE CONTACTS

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CHINA

Capital: Beijing
Population: 1,384,688,986 (July 2018 est.)
GDP: \$12.01 trillion (2017 est.)
Currency: Renminbi yuan (RMB)
Language: Standard Chinese/Mandarin (official)

UNESCO Student Mobility Number:

China has 869,387 students studying abroad according to UNESCO.

CIA World Factbook:

29.54 % of China's population is under 24 years of age.

OVERVIEW

U.S. colleges and universities remain the preferred overseas destination for students from China. According to the 2018 Open Doors Report on International Education Exchange (Open Doors Report), the number of Chinese students studying in the U.S. increased during the 2017-2018 academic year from 350,755 to 363,341, constituting a 3.6 percent increase from the previous academic year. For the 9th year in a row, China remains the leading country of origin for foreign students studying in the U.S., comprising 33.2 percent of all international students studying in the U.S. In 2016, Chinese students studying at U.S. universities and colleges contributed US\$12.55 billion to the economy.

According to the Open Doors Report, in 2017-2018, 40.9 percent of Chinese students studying in the U.S. are at the undergraduate level, while 36 percent of the Chinese students are at the graduate level, and 18.1 percent were completing Optional Practical Training (OPT). Due to increased competition from other countries, the number of Chinese students taking non-degree programs fell by 7.7 percent.

Despite reported strains in the U.S.-China relationship and growing fears that U.S. student visa policy could change and make it more difficult for some Chinese students to study in the U.S., the pool of potential foreign exchange students is growing, and U.S. colleges remain the gold standard in higher education.

SUB-SECTORS

Higher Education

In the 2017/18 academic year, 279,436 undergraduate and graduate students from China studied in the United States for higher education, a 3 percent growth over the previous academic year. China continued to be the leading country of origin for international students in the United States.

For Chinese undergraduate and graduate students, Business/Management is the most popular subject with 20.7 percent of Chinese international students majoring in that subject, followed by 19 percent in Engineering, 17.2 percent in Math and Computer Science, 8.4 percent in Physical and Life Sciences, 8.4 percent in Social Sciences, 6.6 percent in Fine & Applied Arts, and the rest in other subjects. Although most Chinese students in US higher education institutions are studying STEM and Business Management, foreign languages, literature studies, and education are emerging fields of study gaining popularity.¹

While Chinese students' demand for overseas study continues to be strong, U.S. universities and colleges must compete to attract students from China. First, the China market is highly brand-conscious and places strong emphasis on school rankings. This makes it very challenging for lesser-known American schools to attract and recruit students.

Second, in recent years Chinese students have expressed concerns about studying in the U.S. in terms of personal safety, challenges of obtaining a student visa, and opportunities for post-graduate employment. Because of these concerns, students have expressed increased interest in enrolling in educational institutions outside of the U.S.

Third, compared to ten years ago, the number of U.S. and foreign universities and colleges for Chinese students to consider has increased. Besides the United States, many other countries are also actively promoting educational opportunities to Chinese students. For example, the U.K. and Australia offer study programs on a shorter-term schedule, more affordable tuition and fees, and better options for after-graduation employment. As a result, these two countries are becoming increasingly popular destinations for Chinese international students.

Undergraduate

In the 2017/18 academic year, 148,594 Chinese students studied in the U.S. for the undergraduate program, a 4 percent increase over the last academic year.

There are three main cooperation models for undergraduate study programs between U.S. and Chinese universities:

- "2+2" or "3+1" programs are collaborative programs between a Chinese and U.S. university, in which students receive a U.S. degree or a dual degree from both universities. When students are enrolled in a Chinese university, under the 2+2 program, students would spend the first two years of a four-year bachelor's degree program in a Chinese university and the last two years in a U.S. university. Under the 3+1 program, students would spend the first three years in a Chinese university and the last year in an American university.
- U.S. and Chinese universities set up a joint institute/department for certain majors in a Chinese university. In this arrangement, Chinese students can study on both the Chinese and U.S. campuses and earn a dual degree from both universities or from just the Chinese university, depending on the specific program.
- The U.S. university builds an overseas campus in China by partnering with a Chinese university. In this plan, Chinese students can study and receive a U.S.-style education in China and earn an American university degree.

There also is growing demand from Chinese high school students for short-term summer/winter programs, sometimes offered by American universities. Those programs are designed to let students experience an academic environment at a U.S. university and enhance their leadership, problem-solving, and other soft skills. By participating in these programs, students hope to be better prepared if they later apply for a U.S. university.

Given the growing competition in China's education market, lesser known U.S. universities and colleges should take steps to actively demonstrate their unique advantages when recruiting Chinese students. Those advantages could be location of the education institution (such as a metropolitan area with many potential internship or employment opportunities), lower tuition and living costs, or unique academic programs (such as ones that enable course credit transfers).

Community College

In the 2017/18 academic year, 18,723 students from China studied at U.S. community colleges. Accounting for 19.8 percent of all international students, China was the top country of origin of international students at those colleges. U.S. community colleges have increased in popularity and received a high level of acceptance among Chinese international students for several key reasons: community colleges require fewer prerequisites for admission, have more affordable tuition and fees, and most importantly, offer credits recognized by many well-known four-year U.S. universities. Community colleges offer an affordable way to complete an associate degree, and many Chinese students see community colleges as an effective stepping stone for gaining entry into American universities.

Liberal Arts

By 2016, Chinese student enrollment in fine and applied arts programs in the U.S. had more than tripled. Fine and applied arts programs experienced a much faster rate of growth when compared to the traditional leading fields of study such as engineering, business and management, math and computer science. Nearly 900,000 Chinese students take the national college entrance exam for fine arts every year. However, acceptance rates at Chinese universities are very low. For example, in 2015, the Beijing Film Academy had an acceptance rate of 2 percent and the China Central Academy of Fine Arts had an acceptance rate of 10 percent. This leaves many students unable to pursue fine and applied art studies in China, and these students often consider going abroad to study.

Graduate Education

During the 2017-18 academic year, China continued to be the largest country of origin for international graduate students studying at U.S. higher education institutions⁵¹. Engineering, mathematics and computer sciences, and business remain the most popular fields of study in terms of both number of graduate applications from China and first-time enrollment of Chinese graduate students.⁵² In the 2017-18 academic year, there were 130,843 Chinese international graduate students studying in the United States, which represents a 2 percent increase from the previous year.

According to the White Paper on Career Development to Chinese Students in the United States, more and more students are choosing to obtain their master's degree in the United States, after completing their undergraduate studies in China.⁵³ This is an indication that the Chinese government's commitment to improving the quality of education under China's 23th Five-Year Plan (2016-2020) is improving to the point that Chinese students may no longer feel that there is a competitive advantage to having a foreign undergraduate degree in order to find employment in China.

For years, Chinese students studying abroad often stayed on to work after graduating. In 2013, the National Science Foundation found that more than 9 in 10 Chinese students graduating from U.S. higher education institutions with their PhDs remained in the U.S. on average for five years after graduating. These students have long been prized by Chinese companies, for both the quality of their education and their experience of living overseas. These students are now being drawn back to China by opportunities in offered by the Chinese economy, especially in the tech sector.⁵⁴

It is projected that over the next four years, the number of Chinese students studying in the U.S. will grow by 11 percent. To realize these gains, universities and colleges must adapt their recruitment strategies to meet the educational needs and expectations of the Chinese graduate students.

Preschool Education

In 2015, China switched from a one-child family planning policy to a two-child family planning policy. Chinese couples are now permitted by the government to have up to two children. Assuming that the shift achieves its policy goals, population and demand for quality early childhood education will increase. The preschool education market in China has been growing quickly the past few years. Estimates predict that by 2020, the preschool market value will reach RMB540 billion (\$79 billion) from RMB380 billion (\$56 billion) in 2016.⁵⁵

As reported in the Sina Education 2017 White Paper of Chinese Household Spending in Education, families with kids ages 0-6 spend over 20 percent of their annual income on early childhood education. This drives a booming business for a variety of products and services targeting this age group and even babies in the womb. Online content for parent-and-children joint activities, formative English learning, child education, and parenting are among the most popular. Offline, early childhood and day care centers spring up daily and are commonly pursued by investors.

In China, primary and secondary education services are dominated by the state. Preschool services, however, are primarily provided by non-state institutions. For instance, currently over 60 percent of kindergarten schools in China are run by private education providers. Statistics show that currently the top 5 kindergarten operators occupy 2 percent of market share. The rest of the market is fragmented with numerous players. Common challenges for this market include a lack of relevant laws and regulations, shortage of qualified teachers, and low industry standards.

Primary and Secondary Education

China was known for its rigid National Entrance Examination (Gaokao) system where exam scores were used as the most important and often the only criteria for universities to select students. As a result, the afterschool tutoring business focused on helping students obtain a higher Gaokao score, and this business model proved wildly successful. According to the Sullivan Report, the K-12 education market value reached RMB 393 billion in 2017. A Sina Education report estimates that 68 percent of the student population use after-school tutoring programs in tier I cities, 63 percent in tier II and 50 percent in tier III and IV cities.

Over the years, the Gaokao has become more comprehensive and well-rounded. The Chinese Ministry of Education has released measures to reduce student stress (e.g. ranking students, releasing graduation scores for marketing purposes, and using competitive accolades as a criterion for admission to secondary school). The changing philosophy of the Gaokao creates opportunities and challenges for tutoring businesses. As emphasis shifts away from exam preparation, traditional exam prep schools must adapt. Currently the after school tutoring market is quite fragmented, where the top five tutoring businesses hold less than 5 percent of market share. Numerous small-and medium-sized tutoring businesses exist with little to no oversight or quality control from the government. In addition to reforming the Gaokao, the government is starting to focus on tightening regulations with the hope of removing unqualified players and raising the bar for new businesses.

A popular industry report, the JieMoDui annual blue paper on the education industry, forecasts that current national and regional players in the after-school tutoring market will benefit from new government regulations and experience steady growth in the next 2-3 years. Second, the K-12 private education providers are expected to complement the public education system, but the education culture must shift from exam-oriented curriculum to a well-rounded one. Thirdly, competence-oriented education for specific academic subjects will be in greater demand. Since the assessment metric for each Gaokao subject will be more balanced, the

demand for developing critical thinking, presentation, and communication skills is increasing. Fourthly, traditional public schools and small and medium-sized education providers need to upgrade their operations. Demand for improvements is leading to new business-to-business opportunities for leading education businesses capable of providing one-stop solutions, including teacher training, technology products, content, and operation plans to public school or private sector businesses.

Along with public schools, both private school and international school/programs realized double digit growth during the past 5 to 10 years. The recently released Non-State Education Promotion Law is interpreted as a positive signal for encouraging international education business development in non-compulsory education segments such as preschool, senior high school, vocational and higher education. So far only a few U.S. schools have a footprint in China. One model involves joint programming that's between two middle schools that confers students a dual degree upon graduation. Another model includes running a joint program with 5 campuses offering a full K-12 curriculum. This sector shows promise considering the strength of U.S.-branded institutions in China.

Technical and Vocational Education

In China, technical and vocation education is offered by vocational schools and professional training institutions.

China has the world's largest vocational education system, with about 12,300 colleges enrolling 27 million students. Despite the high number of vocational schools, the Chinese government is concerned about the ability of vocational schools to meet demand for skilled workers. The shortage of skilled workers is due in part to the lack of qualified teachers. The Chinese government is aware of the need to upgrade the skills and education of its workforce and is investing heavily in vocational education to bridge the gap. However, China needs foreign investment to bridge the shortfall, which explains why vocational education is the only education sub-sector completely open to FDI.^{vi}

Vocational and technical education in China continues to carry a stigma for being less prestigious than attending a four-year university. Therefore, U.S. institutions interested in entering the Chinese market should highlight both the quality of their programs and that the skills that are being taught are the most current, so that Chinese students are well equipped to compete in a the high-skilled manufacturing and services sectors.^{viii}

There are two types of vocational schools in China: secondary (Grade 9-12) and tertiary (quasi-college). Most of them are public and rely on government funds. The schools in coastal cities generally perform better than those in inland cities. The top challenges that China's vocational schools face are outdated curriculums and low public perception. Partnering with foreign counterparts had been considered a fast track to addressing both issues. After a few years, however, some joint programs still have not met the goals and expectations from both Chinese and foreign partners, and China's vocational schools have become more cautious about the simple import of foreign curriculum or partners. As a result, Chinese vocational schools are starting to more carefully scrutinize the compatibility of foreign models. Nonetheless, most vocational schools are very open to partnership with foreign vocational schools.

Professional Training Services

Both the enthusiasm of private capital and soaring industrial demand are spurring the growth of professional training institutions, particularly in senior care and general aviation. According to a July 2017 report titled *Increase and Shortage – Status of China Senior Care Talents Training 2017*, China needs 10 million senior care providers, but currently only has 1 million practitioners, among which only one-third were qualified, and one-tenth were officially

registered care providers. In the aviation space, according to a general aviation report titled *Report on General Aviation Development 2016-2017*, there were less than 3000 certified GA pilots in 2016, while the market demand was 10,000.

Both senior care and general aviation industries in China are anticipated to develop rapidly in the coming years. Professional training, particularly in senior care and general aviation, are high-potential areas for U.S. training institutions. In addition, online education and other educational technologies will benefit from the tremendous opportunities in China's evolving technical and vocational education system.

Special Education

In July 2017, the Ministry of Education and six other state agencies released the Program for Promoting Special Education: Phase II (2017-2020), following the Provisions on the Management of Disabled Persons in the National Higher Education Entrance Examination (Interim) issued in April. In addition to setting out three priorities, namely completing the special education system, strengthening the institutional assurance for special education, and improving the special education quality, the Program introduced the target of achieving over 95 percent enrollment rate of disabled children in compulsory education.^{ix} This presents unique opportunities for U.S. colleges and universities with highly-regarded special education programs.

Education Technology (EdTech)

Over the last 5 years, China has enjoyed rapid growth in EdTech and online learning sectors. The driving forces include favorable government policies, abundant venture capital, active entrepreneurial activities, increasing consumption, fast-growing mobile internet penetration, and the immense importance that Chinese people attach to education.

The Chinese e-learning market is expected to exceed USD104 billion by 2025, according to a report by UBS Securities. In 2016, both China and the U.S. saw decreased funding volumes and deal numbers for startups. Chinese EdTech startups raised RMB 10.6 billion (USD 1.54 billion) in 2016, compared to the U.S. EdTech startups' USD 1.03 billion. There are 167 venture deals in China compared to 138 in the U.S. K-12 is still the most active sector in China's EdTech market, followed by professional skills training and language learning sectors. Although STEM is not in the top 3 by deal volume, there were 28 deals in STEM and STEM ranked third for deal amount.

The U.S. is the clear leader in educational technology worldwide and has proven models of using technology in and outside of the classroom to deliver high quality education. At the recent Global Education Technology Expo in Beijing, one of two notable annual EdTech events in China, American speakers made up 30 percent of total presenters, followed by U.K and Israeli speakers.

OPPORTUNITIES

The United States continues to be the preferred destination for Chinese students studying abroad. In 2017, the annual report on Chinese Students' Overseas Study found that of 6,217 Chinese students planning to study abroad, 50 percent stated that the United States was their top study destination.^x The motivation for Chinese students to study abroad include:

- The belief that students who obtain diplomas from foreign colleges and universities are more competitive than their peers who graduated from a Chinese college or university;
- Limited places available to study at the premier Chinese universities;
- Foreign colleges and universities offer a broader/more flexible learning environment that appeals to Chinese students;

- The opportunity to become more independent;
- The opportunity to experience new ways of thinking and acting in their field of study;
- The belief that their chances for an international career are improved with a foreign degree.

CHALLENGES

China continues to be a challenging market for most U.S. colleges and universities. To maintain competitiveness, U.S. institutions must remain active in the promotion of American education in China, especially as competition for Chinese students from other English-speaking countries (i.e. Canada, UK, and Australia) continues to grow. U.S. colleges and universities who are looking to enter the Chinese market should consider looking at Tier III and Tier IV cities when developing their market entry plan. U.S. colleges and universities will find that students who are from Tier III and Tier IV can afford to study abroad, but also have more balanced expectations of which schools they might be accepted to. ^{xii}

EVENTS

China International Education Exhibition (CIEET); <http://www.cieet.com/>
 China Education Expo; <http://chinaeducationexpo.com/english>
 China Annual Conference for International Education (CACIE)
 Global Education Technology (GET) Conference; <http://get2018.jiemodui.com/User/Index/en>
 Global Education Summit; <http://www.ges-china.com/2018/en/?page=0>
 China Education Innovation Expo
 China Early Childhood Education Conference & Early Childhood Education Resources Expo;
<http://en.cecec.org/>

RESOURCES

- EducationUSA <https://educationusa.state.gov/>
- International Trade Administration 2017 Education Top Markets Report. Website: <https://www.trade.gov/topmarkets/>
- Ministry of Education—Department of International Cooperation and Exchange. Website: <http://bit.ly/1yo2484>
- China Ministry of Education for Foreign—Chinese Cooperation. Website: <http://www.crs.jsj.edu.cn/index.php/default/index>
- Promoting US Education to Chinese students. Website: <http://www.liuxueusa.com.cn/>
- China Education Association for International Exchange (CEAIE). Website: <http://en.ceaie.edu.cn/>
- Chinese Service Center for Scholarly Exchange (CSCSE). Website: <http://www.cscse.edu.cn/>
- List of Foreign Higher Education Institutions recognized by China's Ministry of Education (MOE). Website: www.jsj.edu.cn

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- ^{xiii} Asia Times Staff.
- ^{xiii} Redden, Elizabeth. “Closures of China-Foreign Programs” (July 11, 2018). Inside Higher Ed
- ^{xiii} “China’s Private Education Market Set to Reach \$330 billion by 2020” (April 27, 2018)
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COLOMBIA

Capital: Bogota
Population: 48,168,996 (July 2018 est.)
GDP: \$314.5 billion (2017 est.)
Currency: Colombian peso (COP)
Language: Spanish (official)

UNESCO Student Mobility Number:
 Colombia has 36,626 students studying abroad.

CIA World Factbook:
 40.85% of the population is under 24 years old.

OVERVIEW

U.S. colleges and universities remain the preferred overseas destination for Colombian students, despite significant competition from other countries like the United Kingdom, Australia, Spain, France, and Argentina. There are several factors that make the United States a leading destination, chief among them higher employment opportunities after graduation, the high quality of education, the chance to improve English skills, and a renewed push by the Government of Colombia to encourage English bilingualism. Furthermore, Colombian businesses are increasing their presence and operations in the United States and bolstering the need not just for English speakers, but for Colombians with actual living experience in the United States and knowledge of U.S. business practices and American culture in general. The preferred states for Colombian students are California, New York, Texas, Massachusetts, Illinois, and Florida. The fields of studies in most demand are those focused on business administration, management, finance, banking, marketing, and engineering.

According to the Institute of International Education, Colombia is ranked 22nd in the world and third among South American Countries (after Brazil and Venezuela) in sending students to the United States. As the peace process solidifies in Colombia and the country becomes more stable and prosperous, the United States is in a good position to see a potential increase in Colombian students.

SUB-SECTORS

Higher education

Colombian Student Enrollment in the U.S.

Indicator	2015/16	2016/17	2017/18
Number of Colombian Students	7,815	7,982	7,976
% Change from Previous Year	1.2	2.1	-0.1

There were 7,976 Colombians who traveled to the United States to study in academic year 2017/18, -0.1 less than previous year. Colombian students in the U.S. are divided between graduate and undergraduate levels as follows:

Colombian Students in the U.S.



Based on data from the Institute of International Education, Colombian students in U.S. colleges and universities contributed USD 302 million to the U.S. economy in 2017/2018 academic year.

The U.S. Embassy in Bogota supports efforts to increase the number of Colombian students studying in the United States by supporting technology projects such as Ed, a 24/7 virtual adviser in Spanish, and various micro scholarships for English Language studies.

Additionally, the “100,000 Strong in the Americas” innovation fund seeks to increase the number of Latin American students studying in the United States and the number of U.S. students studying in Latin America. Partnerships between universities in the United States and higher education institutions in the Western Hemisphere are increasing the student exchange opportunities and strengthening regional education cooperation throughout the Americas.

Under government-to-government or private agreements, both public and private universities in Colombia have developed partnerships with universities in the United States, Europe and Latin America. Priority is given to post-graduate programs for training professors as well as research to enhance teaching.

The U.S. Commercial Service collaborates with Education USA offices in Colombia to support various education fairs that include the participation of U.S. boarding schools, universities, and ESL institutions to promote their programs in Colombia.

With the global job market becoming increasingly competitive, the number of Colombian undergraduate and graduate students in the United States has been growing over the past four academic years. This is partially due to the fact that in Colombia it is difficult to obtain a high-level position within the government or an important national or multinational company without proficient English skills and/or a master’s degree. Moreover, a degree from a U.S. university can make job applicants that much more competitive in the Colombian workplace.

Most scholarships are awarded through two institutions, one of which is the Colombian Institute for Educational Loans and Technical Studies Abroad (ICETEX by its initials in Spanish), which is dedicated to financing higher education through a system of financial aid that allows students to start or continue their higher education either in-country or abroad. In 2017, ICETEX awarded more than 250 scholarships for master’s degrees, PhD, and ESL programs in the U.S. The

second institution is COLFUTURO, which is a non-profit organization that provides funds to Colombian professionals and students to study abroad. Their loan program is available to students who have been accepted to graduate programs at foreign universities. During 2017 COLFUTURO awarded 1,280 scholarships for masters and PhD programs, with 281 of those scholarships being for programs in the United States.

COLFUTURO has agreements with many universities, such as: Carnegie Mellon, Columbia University, Duke, Cornell, University of Florida, American University, Purdue University, Tulane University, New York University, University of Chicago, University of Texas, and Harvard University, among others.

OPPORTUNITIES

Although the exchange rate is still a big factor for Colombian Students wanting to study in the United States, demand and interest remain strong. International education is highly valued in the Colombian workplace and a recent survey of employers found that 58% preferred to hire people who had earned advanced degrees abroad.

For U.S. schools and ESL institutions, private and bilingual schools in Colombia offer good recruiting opportunities. Schools are interested in sending groups to study in U.S. schools for periods that may vary between three weeks and three to four months. The goal of these short-term programs is mainly to acquire and improve English skills.

Today in Colombia, relatively few high school graduates have an advanced level of English. Colombia’s outgoing President Santos recently launched a program called “Colombia Very Well,” with the objective of promoting bilingualism in Colombia. The government’s goal is to increase the number of high school graduates with an intermediate level of English to 185,000 in 10 years. This will open opportunities for U.S. English language institutions to enter or increase their presence in Colombia.

At the higher education level, private universities also offer important recruitment opportunities for undergraduate and postgraduate programs. U.S. Universities should make initial contact with the office of foreign relations in each university in order to introduce the U.S. university and its programs and areas of specialization.

Colombian universities are interested in having agreements with U.S. universities that offer dual degree programs for their students. This can be accomplished through a combination of two or three years at the local university and one or two years at the U.S. university.

Beyond the economic implications, the availability of educational services carries even greater significance in terms of improving general living conditions in Colombia. A well-educated Colombian population is vital to the country’s economic growth and global competitiveness over the long term. U.S. educational services will also expose more Colombians to American culture, further strengthening ties between the two countries.

There are concrete opportunities to increase the number of Colombian students attending U.S. universities. Those wishing to attract Colombian students should consider actively increasing recruitment campaigns to raise their visibility. Financial aid/scholarship opportunities and information on the process to obtain a U.S. student visa are essential topics for U.S. educational institutions when promoting themselves in Colombia.

In Colombia, there is a strong network of 11 Education USA centers administering language programs and doing extensive outreach around the country. Education USA centers are located at nine binational centers, the Fulbright commission, and COLFUTURO.

EDUCATION FAIRS AND TRADE SHOWS

Education fairs are one of the most effective ways to recruit Colombian students. Colombia has

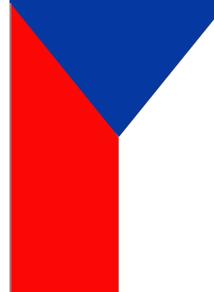
a few education fairs throughout the year. Additionally, Education USA organizes one of the best fairs to promote U.S. Education. This year's fair in Colombia will take place in September in Bogota. Universities interested in participating and exhibiting at the fairs should visit the EducationUSA web page.

RESOURCES

- Institute of International Education: <http://www.iie.org> Colombia Ministry of Education: www.mineducacion.gov.co
- Colombian Institute for Educational Loans and Technical Studies Abroad (ICETEX): <https://www.icetex.gov.co>
- COLFUTURO: <http://www.colfuturo.org>
- Education USA: <http://www.educationusa.state.gov>

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CZECH REPUBLIC

Capital:	Prague
Population:	10,674,723 (July 2017 est.)
GDP:	\$353.9 billion (2016 est.)
Currency:	Czech Koruna (CZK)
Language:	Czech (official)

UNESCO Student Mobility Number:

Total number of students studying abroad is 12,832.

CIA World Factbook:

24.55% of Czech Republic's population is under 24 years of age.

OVERVIEW

The Czech Republic is a good potential market for student recruitment. High quality educational programs, with a strong emphasis on the English language, have produced a large pool of well-qualified candidates for both undergraduate and graduate studies in the U.S.

Study abroad programs are popular in the Czech Republic. Czechs discovered travel and study abroad in the 1990s after the fall of communism. Young Czechs are eager travelers with a desire to gain experience by living and studying in another country.

The number of Czech students in the U.S. has been relatively stable in the last five years and has ranged between 700 and 800 students a year. The number of Czechs studying in the U.S. was 763 students in 2017 which represented a decrease of 9 students over 2016. During the past seven years the number of degree-seeking students has gone down slightly due to competition from both European and Australian and increasingly Asian universities.

U.S. schools are regarded as highly prestigious and attractive to Czech students and the U.S. has a good chance of regaining its former position as a preferred location for higher education. The U.S. was the 5th most popular study abroad destination for Czechs in 2017.

The knowledge level of U.S. university admission procedures has been increasing, especially at the best Czech national high schools. More well-qualified high school students are seriously interested in attending schools in the U.S. and they are well prepared for the admission process. The Czech Facebook community is booming and this network has become one of the major sources of information, as well as a place for social interaction and sharing experiences. Twitter and other social networks lag behind Facebook. The best students, who meet the requirements, can obtain scholarships from several new private foundations. English is the standard second language in the Czech Republic and is taught in schools from grade three onward. Approximately half of the Czech population speaks a foreign language and younger people tend to speak English. A recent government decision making English mandatory for primary school students should improve the ability of Czech students to study at U.S. universities and colleges. Currently 27 percent of all Czechs speak some level of English. According to the EF Index, 59 percent of the Czech working population are proficient in English and 10 percent are reported to be fluent.

SUB-SECTORS

Research and Development

Market Entry

Partnering with local universities is a very effective way of entering the Czech market. The most common partnership model is through student exchanges. One-year study exchange programs are highly attractive to Czech students. U.S. universities should note that Czech universities might expect foreign schools to send a similar number of students to their school.

U.S. universities may also make use of the EU-funded Erasmus Mundus cooperation and mobility program. The Erasmus Mundus Joint Program is an outstanding quality academic program and is designed and implemented by a consortium of European universities. The consortia may also include universities from the U.S. and other parts of the world. Scholarships are open to students and academics from all over the world.

More and more Czech companies are requiring the ability to work in English from their employees, following the lead of global companies based in the Czech Republic. This trend creates demand for English as a Second Language (ESL) studies in the Czech Republic. However, European countries appear to be a more attractive destination for short-term ESL studies especially given the advantages of price and proximity.

Current Demand

Currently, three-quarters of university students who go abroad take advantage of the Socrates- Erasmus program to study in Europe. University studies in the U.S. are most attractive for academically talented students and student athletes who take advantage of sports scholarships. Many Czech students studying at Czech universities spend time at American universities thanks to bilateral exchange agreements.

High school exchanges to the United States can be facilitated through an organization (non-profit or commercial) or can be self-organized. Czechs interested in studying in the U.S. need to apply for the correct visa.

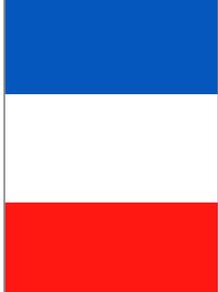
The majority of university students are interested in economic and humanities subjects whereas technical areas rank third in popularity. Around 51 percent of Czech students in the U.S. study at the undergraduate level, 24 percent in graduate programs, and 15 percent opt for non-degree studies.

RESOURCES

- EducationUSA <https://educationusa.state.gov/>
- Ministry of Education, Youth, and Sport, www.msmt.cz
- Open Doors 2018
- SEVIS: <https://studyinthestates.dhs.gov/>
- Fulbright Commission, <https://fulbright-france.org/fr>
- National Agency for European Education programs (including Erasmus Mundus), www.naep.cz
- ICEF www.icef.com
- U.S. Department of Education www.ed.gov
- EACEA www.eacea.eu

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FRANCE

Capital: Paris
Population: 67,364,357 (July 2018 est.)
GDP: \$2.588 trillion (2017 est.)
Currency: Euro (EUR)
Language: French (official)

UNESCO Student Mobility Number:
 Total number of students studying abroad is 90,717.

CIA World Factbook:
 30.32% of France's population is under 24 years of age.

OVERVIEW

In France, the United States is known to be home to some of the world's best colleges and universities. As English is the language of business and diplomacy in the European Union, there is growing interest in studying in English-speaking countries, such as the United States. The ability to speak English in a professional setting gives French students a competitive edge in the employment market. During the 2017/18 academic year, 8,802 French students pursued academic study at U.S. colleges and universities, contributing \$361 million to the U.S. economy. Accordingly, with a well-thought-out strategy, U.S. academic institutions have a unique opportunity to attract French students.

The number of French students attending school in the United States rose steadily in the 1990s peaking at 7,401 students in 2001/02. After a three-year decline, the number of French students began to rise again in 2005/06. Since then, the number of French students in the U.S. has maintained a slow, steady increase for 10 years; the growth rate surpassed 5% in 2014/15 for the first time since 2010/11. In the 2017/18 academic year, there was a slight decrease of .1%.

France is the eighteenth leading country of origin for students coming to the United States and the fourth leading host country for U.S. students studying abroad. For French students studying overseas, the U.S. is the second-most popular destination (behind the United Kingdom). The United States and France expressed their support for the Transatlantic Friendship and Mobility Initiative, which promotes increased student and junior researcher mobility and exchanges. This initiative aims to double the number of U.S. students going to France and the number of French students coming to the United States by 2025, and is endorsed by the Association of American Universities, the Association of Public and Land Grant Universities, the Institute of International Education, and NAFSA: Association of International Educators.

Year	# of Students From France	% Change from Previous Year	# of U.S. Study Abroad Students Going to France
2017/18	8,802	-0.1%	n/a
2016/17	8,814	0.6%	16,462
2015/16	8,764	0.2%	17,214
2014/15	8,743	5.3%	18,198 (up 3.4%)

Year	# of Students From France	% Change from Previous Year	# of U.S. Study Abroad Students Going to France
2013/14	8,302	0.1%	17,597
2012/13	8,297	0.8%	17,210 (up 0.2) 17
2011/12	8,232	1.7%	17,168
2010/11	8,098	5.0%	17,019
2009/10	7,716	4.0%	17,161
2008/09	7,421	5.3%	16,910
2007/08	7,050	5.2%	17,250
2006/07	6,704	1.0%	17,233

Note: Study abroad figures from Open Doors reflect credit given by U.S. campuses during the survey year to their students who studied abroad in the academic year just completed, including the summer term

SUB-SECTORS

Higher Education

There are 8,802 French students studying in the U.S., which comprises .8% of total international students in the United States. The undergraduate level is most common time for French students to go abroad, but other levels are also represented. In 2017/18, the breakdown of education levels was as follows: 33.1% undergraduate students, 26.8% graduate students, 25.1% non-degree students, and 14.9% OPT (Optional Practical Training).

- Undergraduate: 2,915 students
- Graduate: 2,363 students
- Non-degree: 2,210 students
- OPT: 1,314 students

Fields of Study

In 2017/18: Business/Management 23.2%, Engineering 13.9%, Social Sciences 9.2%, Fine/ Applied Arts 7.1%, Math/ Computer Science 5.8%, Humanities 5.6%, Physical/Life Sciences 5.5%, Intensive English 1.4%, Health Professions 1.2%, Education 1.0%, Undeclared 4.1%, Other 22.0%

Community Colleges

Community colleges are an important financial option for French students looking for a U.S. education at a more affordable price. French high school students show a growing interest in community colleges as they are accessible and offer the opportunity to transfer to a university after a couple of years.

Research and Development

Optional Practical Training has contributed to a rise in the overall number of international students in the U.S. because it allows students in science and engineering fields to stay in the country and work for 36 months. This has made studying in America more desirable – particularly for STEM majors.

OPPORTUNITIES

American educational institutions can take advantage of the importance placed on English language abilities as well as the current state of the French labor market. As of January 2018, the unemployment rate in France is 9% with a 21.7% unemployment rate for those under 25 years old. This has led to a “race for diplomas” among French students. Studying abroad has become a great way for graduates to enhance their resume for future positions.

According to a survey conducted by the IIE, many French students find the cost of studying in the United States to be a major obstacle. Approximately 87% of them believe that tuition fees at U.S. institutions of higher education are very high, particularly in comparison to the low-cost French educational system (for public universities) or ERASMUS programs (European Region Action Scheme for the Mobility of University Students) in other European countries. Therefore, in crafting a recruitment strategy, U.S. institutions should consider that studying in the United States represents an important investment for many French students. The high comparative cost of a U.S. education explains why more than half of the French students studying in the United States are also scholarship recipients. However, when compared to other potential study destinations, most prospective students from France perceive the United States to have a superior education system (81%).

American institutions may also benefit from the following niche opportunities:

Second & Third Tier Cities: Most U.S. colleges and universities focus their recruitment efforts in Paris. Recruitment efforts that include other cities in France in addition to Paris (particularly those with strong universities or a sister city connection) generally yield effective results.
Intensive English Language Programs: Today, English has become an essential tool for French students seeking employment after graduation, a market which could be further developed by U.S. schools.

EVENTS

Salon Go Study Abroad, 08 December 2018, Paris
<https://10times.com/go-study-abroad>
<https://www.letudiant.fr/etudes/salons/salon-partir-etudier-a-letranger.html>

AAWE- Council of International Schools – Paris College Days, October 2019
<https://www.aaweparis.org/activities/education/college-day>

Studyrama International Studies Fair, October 2019, Paris
<https://www.letudiant.fr/etudes/salons/rencontres-online-etranger.html>

RESOURCES

Fulbright Commission: <https://fulbright-france.org/>
EducationUSA <https://educationusa.state.gov/>

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<http://www.buyusa.gov/france/etudierauxusa/index.asp>



GABON

Capital: Libreville
Population: 2,119,036 (July 2018 est.)
GDP: \$14.93 billion (2017 est.)
Currency: Central African CFA franc
Language: French (official)

UNESCO Student Mobility Number:

Gabon has 7,129 students studying abroad.

CIA World Factbook:

59.53% of the population is under 24 years old.

Years and %	Undergraduate	Graduate	Non-Degree	OPT
2015-16	296	53	30	31
2016-17	263	39	35	26

OVERVIEW

With a primary language of French, the Gabonese hold one of the highest literacy rates in sub-Saharan Africa. The system for education in Gabon breeds this by having an adult literacy program provided by the government. Education in Gabon is based on the French educational system. On the federal level, it is regulated by two Ministries: the Ministry of Education, which is in charge of Pre-school through to High School, and the Ministry of Higher Education and Innovative Technologies, which is in charge of universities and professional schools.

Approximately 9.6% of Gabon's government budget goes to education. The school life expectancy is 13 years, from Grade 1 to Grade 13. The baccalaureate is the second diploma of value. French is the language of education.

General status of country's education sector and demand for education and training services. Any government or private sector education initiatives, priorities funding, or projects that U.S. institutions should know about.

SUB-SECTORS

Higher Education

From 2016 to 2017, 332 Gabonese students went to study to United States and from 2017 to 2018, 363 Gabonese students went to study to United States which shows a decrease of -6.9%. From 2016 to 2017, they were five U.S. Students studying in Gabon, and from 2017 to 2018, 14 U.S. student were studying in Gabon, which show an increase of 64%.

% of Total	72.5	10.7	9.6	7.2
% Change	-11.1	-26.4	16.7	-16.1
Education Fairs 2015-2017 (with ROTC)	1	1	1	1
Demand for Secondary Education	0	0	0	0

OPPORTUNITIES

- Increase in Petroleum studies
- Engineering in HSE-hygiene –Security-Environment
- Academic English
- Medical studies
- Theology

RESOURCES

- EducationUSA, <https://educationusa.state.gov/centers/educationusa-libreville>
- ELS, <https://www.els.edu/fr>

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GERMANY

Capital: Berlin
Population: 80,457,737 (July 2018 est.)
GDP: \$3,701 trillion (2017 est.)
Currency: Euro (EUR)
Language: German (official)

UNESCO Student Mobility Number:

Germany has 119,021 students studying abroad.

CIA World Factbook:

22.81% of the population is under the age of 24.

OVERVIEW

Germany, with a population of 82.7 million, boasts the largest economy in the European Union (EU). Germans are well-educated, and students see experience abroad as a key advantage when competing for employment and additional educational opportunities. Over 90 percent of Germans study English, which is the first foreign language Germans learn in school. English language courses are mandatory for almost every German student, the degree of difficulty depending on the school level. English is taught in primary school starting in the third grade or earlier. Employers generally prefer job applicants with international experience.

SUB-SECTORS

Higher Education

According to the Open Doors 2018 report, 10,042 German students studied in the United States in 2017–18, a slightly decrease of 1.2 percent in comparison with the previous year. Germany is the 17th largest source of international students in the United States.

Undergraduate: 32.8 percent of Germans studying in the United States are enrolled in undergraduate courses, 3.5 percent more than in 2016/2017 (3,294 students).

Community College: Community colleges have become more popular during the last few years for Germans due to the financial advantage as well as the simplified application process. The fact that it is possible for Germans to register at a community college without the “Abitur” requirement (an examination required to be eligible to attend a German university) also renders community colleges as an attractive option.

Graduate Level Education: The percentage of graduate students in 2017/2018 was 25.6, 3.15 percent less than in 2017.

Optional Practical Training: During the 2017/2018 academic year, 7.8 percent of the German students in the United States pursued an optional practical training, which is a decrease of 2.6 percent.

Non-degree: 33.6 percent attended non-degree programs such as English language or short-term studies, which represents a 3.8 percent decrease compared to the previous year.

Secondary Education

In the academic year of 2016/17 more than 12,000 German high school students participated in an exchange program, 45% of them took place in the United States.

Online Programs: No statistics available.

Research and Development: No statistics available

Professional Training Services

German companies tend to use private trainers to train employees rather than providing in-house training. The German Association for Coaching and Training (dvct.de), with more than 1,400 members, evaluates and certifies training courses to ensure quality. A significant difference between the American and German training services market is that German contracts usually stipulate a fixed base fee rather than working on commission.

The best strategy for a U.S. company interested in entering the German training services market is to find a German partner with whom to collaborate.

OPPORTUNITIES

Undergraduate and Graduate

Studying in the United States is particularly attractive to German engineering, business and management as well as math and computer science students.

One of the most effective ways for U.S. universities to attract German exchange students is to form a partnership with a German university. These partnership agreements facilitate the exchange of students and the recognition of course credits between the partner institutions.

As European universities implement the Bologna Process, which is meant to ensure more comparable, compatible and coherent systems of higher education in Europe and shift to a three-tier bachelor/master/doctorate system of education, European credits and degrees are becoming easier to compare with those of U.S. universities. However, a couple of obstacles for German students planning to study in the United States remain. Cost is the most frequently quoted barrier, especially since education in Germany is free. Also, German students who have been accepted to study in the United States are required to obtain a student visa before departure.

U.S. educational institutions should consider working with exchange organizations in Germany such as the German Academic Exchange Service (DAAD) and the Fulbright Commission, private sector recruiters and advisors and through the nine EducationUSA centers of the U.S. Department of State in Germany. There are also several events focused on student recruitment, listed at the end of the report, which take place in Germany.

Community College

German students with no "Abitur" (an examination required to be eligible to attend a university in Germany) are qualified to apply to a community college in the United States. Transfer Degree Programs are a possible option for those students since the costs are lower than those of a four-year college. An Associate Degree is unfortunately not recognized in Germany.

OPTIONAL PRACTICAL TRAINING

Non-degree

Germany offers strong recruitment opportunities for short-term programs thanks to

Germany's English language proficiency, high per capita income, strong business ties between the two countries, and a well-established secondary exchange program. The average time for Germans attending intensive English Programs in the United States is 12.1 weeks.

Secondary Education

Most German students in high school prefer to study in an English-speaking country, with the United States and Canada being the most popular study abroad destinations. 86.7 percent of the high school German exchange students stay in the United States for the whole academic year.

Online Programs

Due to the flexibility, possibility to work full-time and the "virtual presence" factor, online education is very popular in Germany but digitalization at German schools lags far behind other countries. The new Gewerkschaft Erziehung und Wissenschaft's study of summer 2018 states that "Five billion euros from the digital pact and 3.5 billion euros for school renovation - as foreseen in the coalition agreement between ruling political parties - are far from sufficient."

Research and Development

Education and research are major priorities for the German Federal Government. The Pact for Research and Innovation's ('Pakt für Forschung und Innovation') objective is to stabilize and increase funding for the main non-university research organizations (Fraunhofer-Society, Helmholtz-Association, Max-Planck-Society, Leibniz-Association, German Research Foundation) with 5% annual funding increases. The increases in funding are tied to research policy objectives that are also included in the Pact. Federal and Laender governments have agreed in October 2014 to continue the Pact for Research and Innovation until 2020. Starting from 2016, funding increases by 3% annually instead of 5%. In total, around 6.2 billion euros were invested in institutional research funding in 2018.

TRADE EVENTS

Learntec (January 28-30, 2019, Karlsruhe) <https://www.learntec.de/de/>
Didacta (February 19-23, 2019, Hanover) <https://www.didacta-hannover.de/home>
Zukunft Personal (September 17-19, 2019, Cologne) www.zukunft-personal.de/en
EducationUSA, <https://educationusa.state.gov>
QS World MBA Tour, <http://topmba.com/events/qs-world-mba-tour>
International College Days, <http://collegeday.de>

RESOURCES

- Deutscher Akademischer Austauschdienst (German Academic Exchange Service), www.daad.de/en
- Fulbright Kommission, www.fulbright.de
- EducationUSA, <https://educationusa.state.gov/>

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HONG KONG

Capital: Hong Kong
Population: 7,213,338 (July 2018 est.)
GDP: \$341.4 billion (2017 est.)
Currency: Hong Kong Dollar (HKD)
Language: Cantonese (official), English (official)

UNESCO Student Mobility Number:
 Total number of mobile students: 37,206

CIA World Factbook:
 22.27% of the population is under 24 years old.

OVERVIEW

With 7,162 Hong Kong students studying in the United States during the 2017/2018 academic year, 62% of these students are undergraduate students.

Hong Kong's education system, which went through a major restructuring initiative from 2008 to 2012, is now comprised of 3 years of junior secondary followed by 3 years of senior secondary schooling. This leads to the HKDSE (Hong Kong Diploma of Secondary Education) exams where students gain admission to a range of post-secondary, vocational, and tertiary courses offered by local schools based on their examination results. Given the highly qualified and sophisticated applicant pool, Hong Kong's university selection process is extremely competitive. Only 18% of Hong Kong applicants gain admission to local Universities. As such, there is tremendous interest in studying abroad. Under the Hong Kong Chief Executive new policy address in 2018, starting from the 2018/19 school year, the government will disburse a new Promotion of Reading Grant involving a recurrent expenditure of about \$50 million to all public-sector schools. This will encourage schools to create a better reading atmosphere, enhance students' interest in reading and help them develop a good reading habit.

SUB-SECTORS

Higher Education

Many Hong Kong high school graduates believe that a U.S. education will boost their job prospects in Hong Kong. Local parents are also beginning to recognize the academic excellence of colleges outside the Ivy League. This is the result of an increasing number of American institutions attending Hong Kong education shows and vigorously promoting themselves to Hong Kong schools and students. Ideally, new-to-market schools should try to meet with high school counselors and students face-to-face to gain exposure and raise their profile. Word of mouth is also a significant factor in college choices. The school counselors and students are very concerned with the recognizable position of the U.S. colleges internationally when applying jobs after graduation. They would like to hear the internship opportunities from top corporates from an alumni point of view. Therefore, we would recommend U.S. Colleges to invite their current students or alumni to talk about this when promoting their schools in Hong Kong virtual or education fairs. A growing number of colleges and universities are increasingly relying on their Hong Kong alumni as an additional channel to reach potential students as well as donors.

Partnering with local schools in joint degree programs, faculty exchange, and student exchange are effective ways to increase visibility and gain recognition. However, these higher education institutes do take into consideration the uniqueness of the program and sometimes the ranking of the partner school.

Hong Kong parents commonly employ education agents to search for appropriate schools and provide other related services. U.S. schools should consider partnering with several agents in Hong Kong who are capable of promoting their schools and recruiting students. The U.S. Commercial Service in Hong Kong can provide pre-screened meetings with agents and high schools.

OPPORTUNITIES

Apart from 4-year colleges, there is an emerging market for 2-year community colleges where admission requirements are comparatively lower. Hong Kong students tend to be more interested in community colleges with guaranteed transferable credits to universities especially those schools that can be transferred to top four-year colleges in U.S.

Recently, there has been a small yet slowly emerging demand for high school education in the United States. This is partly due to a desire to opt out of a too academically-focused and highly competitive education system. On the other hand, some students tend to think that a private boarding school education can provide them with the academic, cultural and language skills that might improve their chances of entering elite universities in the United States.

EVENTS

Education and Career Expo (annual):
<http://m.hktdc.com/fair/hkeducationexpo-en/HKTDC-Education-and-Careers-Expo.html>

Hong Kong International Education Expo (annual):
<http://www.newwayfairs.com/EN/EventCalender.asp>

Hong Kong Virtual Education Fairs (4 times annually) - Organized by US Commercial Office in Hong Kong. The U.S. academic institutions include as follow:

- U.S. Undergraduate Degrees- 4 Years College
- U.S. Community College
- U.S. Graduate Programs
- U.S. Summer Study Abroad Programs
- U.S. Technical and Vocational College

RESOURCES

- Hong Kong Government Education Bureau, www.edb.gov.hk/en
- Education USA, <http://educationusa.hk/index.php>

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INDIA

Capital: New Delhi
Population: 1,296,834,042 (July 2018 est.)
GDP: \$2.602 trillion (2017 est.)
Currency: Indian rupee (INR)
Language: English

UNESCO Student Mobility Number:
 India has 305,970 students studying abroad.

CIA World Factbook:
 44.77% of the population is under 24 years old.

OVERVIEW

The emphasis on higher education in India has never been as relevant as it is today, and this sector has grown significantly in the last two decades. Per the University Grants Commission (UGC) 2018 data, there are 882 universities in the country, including 392 state universities, 125 deemed universities (a status of autonomy granted to high performing institutes and universities by the Department of Higher Education), 48 central universities (established by the Department of Higher Education), 317 private universities; and 91 institutes of national importance, such as Indian Institute of Technology (IIT), National Institute of Technology (NIT), Indian Institutes of Science Education and Research (IISER) etc. In addition, there are private and accredited universities, institutions created by an act of Parliament, independent institutes and over 41,435 colleges. Together they offer a wide range of degree and diploma programs. (Source: www.ugc.ac.in; www.mhrd.gov.in)

The UGC is the regulator providing grants, coordination, and setting standards in institutions of higher education in India. The higher education sector in India can broadly be divided into two segments - regulated and un-regulated. The regulated segment includes central, state and private universities, private/professional colleges, and technical and research institutions. The unregulated segment includes online education, vocational training, finishing schools, professional development and training and coaching classes.

India's higher education system is the world's third largest in terms of student enrollment next only to China and the United States. The huge demand/supply gap, participation of a large number of private players, growth of the IT sector, demand for a skilled workforce, increasing FDI, disruptive innovation, and online education are a few factors which have led to the exponential growth in this sector.

India has emerged as a strong market for investment in the training and education sector due to its favorable demographics (young population) and being a services-driven economy with growth in sectors such as software development, pharmaceuticals, life sciences, and healthcare.

SUB-SECTORS

Higher Education

India is a strong market for graduate institutions from the United States who are interested

in attracting students. Though there is growing interest for undergraduate studies in United States, limited scholarships and the increasing cost of education are major deterrents. However, with the increase of international schools in India, the interest in undergraduate study in the United States is expected to increase further in the years to come. Community colleges would also have its own share of international students added to the undergraduate student pool.

India is currently considering once-in-a-generation educational reforms, which may open more opportunities for U.S. higher education institutions in India. The Ministry is in the process of finalizing its revised National Education Policy, which was last updated in 1986. The draft text includes a recommendation that top global higher education institutions be allowed to establish foreign campuses in India and award degrees in partnership with Indian Institutions. The United States is advocating for the Indian National Education Policy to allow for increased opportunities for foreign higher education institutions.

There are several possible collaborative opportunities for non-Indian universities with Indian educational institutions. Some of these are:

- **Twinning Programs**
 In a twinning arrangement, a student undertakes a course study at his own institute in India for a set period of time and later spends equivalent time in the overseas institution.
- **Service Providers**
 Non-Indian universities can enter into partnerships with Indian educational institutions to provide expertise and services such as faculty for teaching, curricula, affiliations, etc.
- **Student Exchange Programs**
 With an intention to enhance cross cultural exposure, and also provide a global perspective to students, the student exchange programs encourage Indian students to spend short time periods generally ranging from two weeks to a full term/semester at the campus of an overseas university.
- **Faculty Exchange Programs**
 Faculty exchange programs are devised with the intent to enable the teaching staff to teach or conduct research for short periods at the campus of the counterpart university/college. This option benefits the faculty by providing exposure to a varied culture as well as an opportunity to exchange ideas and observe a variety of styles in a different setting.
- **Joint Research Programs**
 The purpose of these programs is to advance collaborative research between non-Indian universities and Indian Institutes while providing opportunities for young researchers to hone their skills.
- **Representatives and Recruiters**
 Setting up an entity in India or entering into arrangements with Indian parties for assistance with student recruitment activities and to encourage Indian students to enroll with the university overseas.
- **Distance Education Programs**
 The e-learning or distance education program offered by many non-Indian universities to Indian students who are not physically present in a traditional educational setting such as a classroom, using technologies like the Internet.

RESEARCH AND DEVELOPMENT

As per the annual Open Doors Report in the 2017–18 academic year, 196,271 students (including graduate, undergraduate and OPT) from India were studying in the United States. India is the second leading place of origin for students coming to the United States. Students from India make up approximately 17.9 percent of the total foreign student population in the United States. Of the 196,271 students from India, 48.7 percent are graduate students, 11.9 percent are undergraduate students, 1 percent select other programs and 38.4 percent are classified as pursuing OPT (Optional Practical Training) in the United States. This year India saw 5.4 percent growth for Indian students in the U.S. The international students' data in different fields of study shows a considerable increase not only in streams like engineering, computer science and business, but also in the health professions, and life sciences fields. (Source: http://www.iie.org/en/Research-and-Publications/Open-Doors.V_RGL2z7V9A)

EVENTS

- Linden international recruitment fairs in India (January 28–Feb 04, 2018), <http://www.lindentours.com/fairs/>
- ISN education fairs (February 12–18, 2018), <http://isnexpo.com/package/india-expo/>
- The MBA tour (February 2018), <http://www.thembatour.com/bschool/calendarEvents.html>
- FICCI Higher Education Summit (November 2018), <http://www.ficci-hes.com/>
- EducationUSA fairs (September/October 2018)

RESOURCES

- EducationUSA, <https://educationusa.state.gov/>
- All India Council of Technical Education (AICTE), www.aicte-india.org
- Association of Indian Universities (AIU), <http://www.aiu.ac.in/AIUTEST/index.php>
- Ministry of Human Resource Development (MHRD), www.mhrd.gov.in
- National Assessment and Accreditation Council (NAAC), www.naac.gov.in
- National Council of Educational Research and Training (NCERT), www.ncert.nic.in
- National Institute of Open Schooling (NIOS), <http://www.nios.ac.in/>
- United States–India Educational Foundation, www.usief.org.in
- University Grants Commission (UGC), <http://www.ugc.ac.in/>
- Open Doors IIE, http://www.iie.org/en/Research-and-Publications/Open-Doors#.V_RGL2z7V9A

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INDONESIA

Capital:	Jakarta
Population:	262,787,403 (July 2018 est.)
GDP:	\$1.015 trillion (2017 est.)
Currency:	Indonesian rupiah
Language:	Indonesian (official)

UNESCO Student Mobility Number:

Indonesia has 45,206 students studying abroad.

CIA World Factbook:

41.57% of the total population is less than 24 years old.

OVERVIEW

Indonesia is the world's fourth most populous country and third-largest democracy. It is an archipelago comprised of over 17,500 islands and is home to 265 million people, 87% of whom identify as Muslims, making it the world's largest Muslim-majority nation on earth. The population is dominated by a young generation; close to 50% of who are younger than 30 years old. The country's middle class is growing rapidly and is the biggest in Southeast Asia. The number of families with household income exceeding US\$ 10,000 is expected to double by 2020, while the average disposable income is expected to increase 3-5 % annually.

Indonesia has compulsory education that lasts 9 years from age 7 to age 16 years old. The primary to post-secondary education academic year begins in July and ends in June. The Indonesian school system is immense and diverse with over 50 million students and 3 million teachers in more than 250,000 schools throughout the archipelago. Based on data on Indonesian education statistics, the number of university students was about 6 million in 2017 and is projected to grow over the next 5 years. Universities in Indonesia are largely private. There are three ministries that supervise and organize the entire system, namely the Ministry of Education, Ministry of Religious Affairs, and Ministry of Research & Technology. The education ministry oversees state primary, junior and secondary schools; the religious-affairs ministry has control of Islamic schools and other religious schools; and the ministry of research and technology is responsible for universities and polytechnics.

SUB-SECTORS

Higher Education

Indonesia is a huge potential market for U.S. providers of secondary, tertiary, and vocational education. The Indonesian government has made a clear commitment to education. The government has taken steps toward education reforms and greater investment in education in recent years. Significant increases in government spending have led to real gains in terms of secondary enrollment, and the number of higher education students has doubled over the last five years. This equates to an increase in the number and quality of students seeking post-secondary education opportunities.

In the 2017-2018 academic year, 8,650 students from Indonesia were studying in the U.S. (down 1.4% from the previous year). Indonesia is the nineteenth leading place of origin for foreign students studying in the U.S. Over 96 percent of all student visas are granted by the

U.S. Embassy in Indonesia, and 95% of Indonesians studying abroad are self-funded. This group of students finances their education privately with financial support from their parents or assistance from overseas relatives. The remaining five percent of students are financed by local universities, companies, government, and scholarships through different grants.

There are two types of high schools in Indonesia: SMA (Sekolah Menengah Atas) and SMK (Sekolah Menengah Kejuruan). SMA students are prepared to continue getting higher education, while SMK, as a vocational school, prepares its students to work after finishing their school without getting higher education. There are many International Schools in Indonesia. International Schools adopt an international curriculum such as IB (International Baccalaureate) or CIE (Cambridge International Examinations).

Year	Business/ Management	Engineering	Life Science	Math & Computer Science	Health Professions
2014	30%	17%	8%	5%	2%
2015	29%	17%	7%	5%	2%
2016	31.1%	17.1%	7%	5.6%	1.9%
2017	30.3%	16%	6.5%	7.1%	1.9%
2018	28%	17.8%	6.8%	8.5%	1.9%

Source: Open Door 2018

COMPETITION

For the past 10 years, U.S. institutions have been losing significant market share to rivals, especially Indonesia's neighboring countries like Australia, due to high cost of tuition/fees at U.S. institutions. Australia, Singapore, Malaysia, UK, Japan, New Zealand and Korea have aggressively promoted their education programs in Indonesia. Australia is the number one choice for Indonesians abroad, largely due to geographic proximity, perceived institutional quality, and English-language instruction. The number of Indonesian students choosing to study in Australian higher education institutions has increased by more than 8% in the past year. One in four Indonesian students who study at universities overseas chooses to study abroad in Australia. More than 20,000 Indonesian students are studying in Australia starting from vocational training to universities levels. The most popular courses for Indonesians in Australia are in the fields of management and commerce, society and culture and engineering and technology, there are also significant increases choosing education, natural and physical sciences and agriculture and environmental studies.

New Zealand, China, Malaysia, Canada and Singapore have joined forces with each other in announcing their intention to attract more Indonesian students. China, in particular, increased scholarships in the country after witnessing a 42% enrollment surge at its universities in 2007-2009. Malaysia became the second-most popular destination for Indonesian students in 2010, which is reflective of an Indonesian focus on affordability and cultural similarities.

OPPORTUNITIES

A recent survey conducted by a leading Indonesian newspaper shows that most students perceive academic institutions in the U.S. as offering the highest quality of education compared to academic institutions in other countries. The U.S. has consistently been a

desired destination for Indonesian students seeking to study overseas. U.S. universities and community colleges can become more visible in the Indonesian market through participation in education fairs, including the U.S. Department of State's EducationUSA Fairs and/or by working with educational consultants. Educational consultants are very popular with prospective Indonesian students and their parents as they serve as "one-stop-shops" for applying to schools and provide services such as assisting with visa applications and arranging travel and accommodations.

To compete with other countries which offer lower tuition fees, universities are participating in "1+1" or "1+3" or "2+2" programs which enable students to apply credits from the years of study at a local university towards an undergraduate degree at a U.S. university. Studying at U.S. community colleges has also become an increasingly popular option for Indonesian students. Some 40% of Indonesians applying for student visas to the U.S. have been accepted at a community college, and half of the top 10 school destinations are community colleges.

Finally, vocational schools have increasingly become targets of Indonesian government interest. The Indonesian government is planning to improve the current vocational education system with multiple skill certificates, in which vocational school students can earn certificates after completing training courses in addition to their high school graduation diploma. This system could speed up the process of workforce employment. Data from the Education and Culture Ministry shows that Indonesia currently has more than 13,000 vocational schools, each of which specialize in one of several fields, including tourism, business, maritime industries and machinery. The Indonesian government also has invited business players to contribute in an expanded role to shape the curriculum and set the skill standards relevant to the demands of the job market. Business players are also expected to provide internship opportunities and on-site training programs for both students and teachers. There may be opportunities for U.S. vocational schools to partner with Indonesian vocational schools to support the development of curriculum and establish a presence in Indonesia. In addition, U.S. vocational schools may enjoy increasing appeal as opportunities to gain overseas education and employment experience.

EVENTS

There are many education fairs take place in Indonesia throughout the year. Many education agents in Indonesia also have their own fairs. Some of education fairs in 2019:

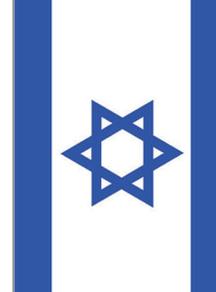
- Indonesia International Education & Training 28th Edition 2019 (February 14-17, 2019) Jakarta <https://ina-eduexpo.com/>
- Indonesia Education Fair 2019 (March 9 – 12, 2019) Jakarta, Bandung, Yogyakarta <http://webaworld.com/event/Indonesia-Jakarta/6.php>
- ISN Spring 2019 Tour (March 14 & 16, 2019) Bali and Jakarta <https://isnexpo.com/asia-expo/>
- Global Educational Supplies & Solutions 2019 (September 18-20, 2019) Jakarta www.gessindonesia.com
- World Education Expo Indonesia 2019 (September 26, 2019 – October 2, 2019) Medan, Jakarta, Surabaya and Denpasar. <https://weei.worldeducationexpos.com/>
- ISN Fall 2019 Tour (October 19-20, 2019) Jakarta and Surabaya <https://isnexpo.com/asia-expo/>

RESOURCES

- EducationUSA, <https://educationusa.state.gov/>
- Ministry of Education and Culture, <https://www.kemdikbud.go.id/>
T: +62-21-344-9230 ext: 6187/6186
- Ministry of Research, Technology, and Higher Education, www.ristekdikti.go.id
T: +62-21-150-0661
- American Indonesian exchange Foundation (AMINEF), www.aminef.or.id
T: +62-21-5793-9085
- Institute of International Education,
<https://www.iie.org/Research-and-Insights/Open-Doors/About-Open-Doors>

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ISRAEL

Capital:	Jerusalem
Population:	8,424,904 (July 2017 est.)
GDP:	\$350.7 billion (2017 est.)
Currency:	Israeli New Shekel (ILS)
Language:	Hebrew (official)

UNESCO Student Mobility Number:

Israel has 14,386 students studying abroad.

CIA World Factbook:

42.84% of the population is under 24 years old.

OVERVIEW

Israel has a long tradition of academic excellence, boasting world class universities, colleges and research institutions. Israeli higher education institutions provide a diversity of academic programs in English for international students at the Bachelor and Masters degree level ranging from short-term courses to full degree programs. Israeli Institutions also welcome international students and researchers for PhD and Post-Doctoral research and assign them with leading researchers in the field.

Today, institutions of higher education in Israel are as follows: seven state universities, one open-university, 36 academic colleges (seven regional colleges associated with universities, 29 other regional colleges) and 21 teacher training colleges. Also, there are 12 institutions that offer diploma-level programs that are recognized by the Ministry of Education, 11 art schools, and 59 technological colleges. All Israeli universities and 41 of the colleges are publicly funded, while 12 colleges are privately funded. Highlighted fields of study include Science and Engineering, Innovation & Entrepreneurship, Agriculture & Sustainability, Art Design & Music, Jewish Studies. There are currently 306K students enrolled in academic institutions in Israel. The breakdown is as follows: undergraduate – 230,800, graduate – 63,400, third degree – 11,400. In the last ten years, the number of enrolled undergraduate students rose 48%, the number of graduate students grew 95% and third-degree students rose by 68%.

The Council for Higher Education (CHE) is the official authority for higher education in Israel and determines policy for the higher education system. The 2018-2019 school year will mark the 60th anniversary of the CHE and 70 years of Israeli academic excellence. In 1948, there were about 1,600 university students in Israel in three universities: The Technion, Hebrew University, and the Weizmann Institute. Since then, over the past 70 years, the Israeli academic system has grown significantly and now includes 62 institutions of higher education. The most recently published OECD report ranked Israel in second place in the world in the percentage of native citizens ages 25-64 who have post-secondary and academic education (48.5%). Engineering is now the largest program of study in Israel; one of every four students enrolled in a program of higher education in Israel studies engineering or computer science.

Unlike most countries, Israel has a mandatory military service. Therefore, all young adults serve in the military after completion of high school (men serve 3 years, women serve 2 years) between the ages of 18-22. Israeli's look for education opportunities only after completion of the military. Unlike the US, Israelis begin their education in their early 20's. This is after many of them spend a year abroad traveling.

SUB-SECTORS

Higher education

In 2017/2018 there were 2,327 Israeli students studying in the United States, 2.8% less than the previous year (Breakdown: 698 Undergraduate, 1,119 Graduate, 147 Non-degree and 363 OPT).

Israeli students typically apply for law, psychology, business administration, medicine, and veterinary medicine, engineering and fields that are not offered as BAs in Israel such as hotel administration, advertising, art and therapy. Short-term or non-degree study includes fields such as English language, culinary arts, sound engineering, jazz or acting, architecture and institutions offering sports scholarships. Popular majors include: business administration, law, clinical psychology, industrial/organizational psychology, culinary arts, film, music, video editing, advertising, international relations, computer sciences, engineering, architecture, mass communications, pre-med, and life sciences. Increasingly popular is ecology, environmental sciences, make-up artistry, image consulting, drug and substance abuse counseling, and various expressive therapies.

Exchange Programs and Cooperative Agreements

There has been a growing trend by U.S. schools signing cooperative agreements with selected Israeli universities and colleges in an effort to attract graduate and post-doctoral students to their institutions and to work on collaborative research and development projects in areas of common interest.

Digital learning

The era of the internet has allowed for access to many areas of knowledge through digital means that are not necessarily a formal classroom. To prepare for the changes, digital courses have become an effective way of improving the quality of education and the educational experience as well as a way of making education more accessible. To become a part of this global revolution, a connection was made between the edX Project, backed by Harvard, MIT, and the State of Israel through a national initiative called Digital Israel at the Ministry for Social Equality. The connection permits academic institutions in Israel to place courses appearing under the caption IsraelX on the international edX platform. Additionally, edX assisted in establishing an Israeli platform – Campus – on which courses at Israeli academic institutions may also be made accessible. The CHE will be investing NIS 120 million in the coming years, which will include grants to produce very high-level online courses. The online courses will make all of the knowledge in the system of higher education accessible to students in Israel and worldwide as well as to many populations that are not able to visit the institutions themselves.

Entrepreneurship and Innovation

The establishment of “New Centers” for entrepreneurship and innovation on campuses in Israel is intended to allow students to take part in active learning while turning the academic institution into a place where ideas could be realized. To do so, centers for entrepreneurship and innovation will be established on campuses at which students from various disciplines can receive entrepreneurship training and can work together with lecturers and researchers along with the assistance of professional mentors to move forward important projects of significance to society, the economy, health, and more. The entrepreneurship centers will utilize the campus to create an innovative ecosystem that encourages creativity, that brings down barriers, and connects academia to industry.

Turning libraries into social and knowledge centers - The transition from books, catalogs, and periodicals to knowledge that is primarily based in digital media and the transition

from private, individualized study in a quiet space during the hours that the library is open to an ecosystem of collaborative study in teams throughout all hours of the day requires a change in academic libraries. The academic libraries on the new campus will serve as incubators of creativity by making quality information (analog and digital) accessible, by their ability to be a physical center for people to meet (librarians/information scientists, students, lecturers, and researchers from a range of disciplines), and by instilling advanced digital scholarship.

OPPORTUNITIES

Today, attention in Israel has turned to secondary study and relevant accreditation; be it degree, diploma or certificate. Israelis are looking to broaden their horizons both professionally and personally and are investigating opportunities to study abroad. According to the OECD, Israel is the second most educated country in the world, which suggests that it is home to prospective international students of the highest quality. Also, Israel has the second highest number of GMAT takers per capita of any country in the world and provides the seventh largest number of takers of any country in the world, ahead of France and Germany. Best prospects for U.S. educational institutions are to offer a degree integrated with practical work experience.

EVENTS

Education Fairs

RESOURCES

- EducationUSA – Ralph Amelan, Advisor, American Center Jerusalem - Amelanrm@state.gov
- Fulbright – Aaton Schiffman, Public Affairs Office, US Embassy Jerusalem – schiffmanex@state.gov
- Ustudy Global LLC– David Adler, Director – david@ustudy.co.il
- Yeda Plus (service provider) - Test preparation courses for the TOEFL, SAT, GRE, GMAT, LSAT, IELTS

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ITALY

Capital:	Rome
Population:	62,246,674 (July 2018 est.)
GDP:	\$1.939 trillion (2017 est.)
Currency:	Euro
Language:	Italian (official)

UNESCO Student Mobility Number:

Italy has 65,307 students studying abroad according to UNESCO.

CIA World Factbook:

23.21 % of Italy's population is under 24 years of age.

OVERVIEW

In Italy, schools are mainly State schools. Non-state schools may either have a status equal to State schools (equal) or be merely private schools. Equal schools are run by either private subjects or public subjects (e.g. local authorities such as Municipalities and Provinces) and have obtained the equal status after meeting some specific requirements (law no. 62/2000). Equal schools are public entities and can release all official certifications foreseen by the Italian education system. Only private schools are not part of the Italian education system and cannot release official certifications.

The State directly finances State schools through funds included in the budget of the Ministry of Education, University and Research (Miur).

Equal schools, as they are part of the national education system, receive State funds according to specific criteria established by regulations. Regulations also establish that priority must be given to those schools run by non-profit entities (Ministerial Decree of 21 May 2007).

The Higher Technical Education and Training System (IFTTS) is financed by the State and co-financed by the Regions.

The State directly finances higher education institutions (Universities and Afam - Higher Artistic Musical and Coreutical Training - institutions) through funds included in the budget of the Ministry of Education, University and Research.

The Italian Constitution establishes that education is accessible to everyone and that compulsory education is free (art. 34). At present, compulsory education lasts 10 years (from 6 to 16 years of age). Education, at all levels, is accessible throughout the national territory and Italian is the official language of education.

First Cycle of Education

The first cycle of education is compulsory and is made up of primary and lower secondary education.

- Primary education (scuola primaria) starts at 6 years of age and lasts 5 years.
- Lower secondary education (scuola secondaria di I grado) starts at 11 years of age and lasts 3 years.

Within the first cycle, students pass from one level to the next one without exams. At the end of the first cycle of education, students who pass the final state examination progress directly to the second cycle of education, the first two years of which are compulsory.

Second Cycle of Education

The second cycle of education starts at the age of 14 and offers two different pathways:

- the upper secondary school education
- the regional vocational training system (IFP).

The first two years of the second cycle of education are compulsory.

The upper secondary school education (scuola secondaria di II grado) offers both general (liceo) and vocational (technical and vocational) programs. Courses last 5 years. At the end of the upper secondary school education, students who successfully pass the final exam receive a certificate that gives them access to higher education.

The regional vocational training system (IFP) offers three or four-year courses organized by accredited training agencies or by upper secondary schools. At the end of regional courses, learners receive a qualification that gives them access to second-level regional vocational courses or, under certain conditions, short-cycle courses at higher education level.

Higher Education

The following institutes offer education at higher level:

- Universities (polytechnics included – Polytechnics are institutes that include a faculty of engineering and an architecture faculty, with specialization schools in the various engineering sectors);
- High level arts, music and dance education institutes (Alta formazione artistica, musicale e coreutica - Afam);
- Higher schools for language mediators (Scuole superiori per mediatori linguistici - SSML);
- Higher technical institutes (Istituti tecnici superiori - ITS).

Access to university, Afam and SSML programs is solely for students with an upper secondary school certificate. The Ministry of education and individual institutions establish the specific conditions for admission.

Courses at ITSs are accessible to students with an upper secondary certificate and to students who have attended a four-year regional vocational course followed by an additional one-year course in the Higher Technical Education and Training system (IFTTS). ITS offers short-cycle bachelor programs, according to the Bologna structure.

Study Abroad

Studying abroad takes place mainly through the Erasmus Program. The Program foresees now more opportunities also for new graduates.

Students can choose among a study period abroad at a partner higher education institution (HEI) and a traineeship abroad in an enterprise or any other relevant workplace.

The study/traineeship period abroad must be part of the student's study program to complete a degree at a first cycle (Bachelor), second cycle (Master) and third or doctoral cycle. A student can receive up to 12 months of Erasmus funding per each cycle of study, independently from the number and types of periods abroad.

Then the Fulbright Program, the flagship international educational exchange program sponsored by the U.S. government, is designed to increase mutual understanding between the people of the United States and the people of other countries, such as Italy.

In Italy the Program is administered by the Commission for Cultural Exchanges between Italy and the United States - the US-Italy Fulbright Commission - a bi-national body financed and managed by the U.S. Department of State and the Italian Ministry of Foreign Affairs. Honorary Presidents are the Italian Minister of Foreign Affairs and the United States Ambassador to Italy.

Overview

According to the Institute of International Education's 2018 Open Doors report, Italy is ranked 6th among countries sending students to the U.S. for higher education and training services. During the 2017/2018 academic year 5,789 Italian students were enrolled in undergraduate, graduate, OPT, or Intensive English Programs in the U.S. This was a 3.5% increase over the previous academic year. Italy is also the second most popular host for American students, with 35,366 in the 2016/17 academic year. This was a 1.4% increase over the previous academic year.

SUB-SECTORS

Higher Education

Number of students studying in the U.S.: 5,789

Courses of study: Italian students go to the U.S. for degrees in business or engineering. An MBA is highly regarded in Italy, and Italian students who enroll in MBAs generally excel at their studies (being used to the rigor of the Italian system).

2017/2018 statistics as compared to previous year (2016/2017):

- **Undergraduate:** 2,092 +3.5%
- **Graduate Education:** 2,087 +2.5%
- **Non-Degree:** 819 +3%
- **OPT:** 791 +6.7%

OPPORTUNITIES

Italy's demand for American educational services has grown over the last year. 5,789 Italians studying in the U.S. in the 2017-2018 school year as undergraduates, graduate students, international scholars or participants in intensive English courses. The most popular U.S. programs are English as a Second Language, MBAs and other graduate and short-term programs that give students the opportunity to live in America, to make contacts and to improve their English.

Italian demand for an American education at the undergraduate level is not particularly strong due to the difficulty in transferring credits, as well as the fact that American degrees are not officially recognized in Italy. Students often prefer flexible graduate programs and one-year study exchange programs as a way to gain international experience, perfect their English and make contacts abroad, all in a shorter period and at a lower cost. E-learning opportunities are also becoming increasingly popular in Italy, especially for language training and continuing medical education (CME).

Cost is usually the main barrier, however, demand remains high as Italians place great value on a U.S. education. Although some financing options do exist, many students are opting for shorter, less expensive programs to study in the United States.

One should note that due to university autonomy and a growing sensitiveness towards internationalization, the number of international agreements between Italian and foreign universities has increased. In order to keep records of such inter-university agreements, a platform was created in 2009 by the Ministry of Education, the Ministry of Foreign Affairs and the Conference of Rectors of Italian universities (CRUI).

The Ministry of Foreign Affairs contributes to the internationalization of the university system through agreements and specific projects, funding for the mobility of researchers within bilateral programs, awarding grants and allowances for post-graduation programs and for scientific and technological initiatives, always included in bilateral programs.

The Ministry of Foreign Affairs publishes the offer of scholarships, coming from several States and some International organizations for attending courses at universities or higher institutions abroad, for conducting research in public archives, cultural centers, libraries, laboratories and for attending language courses at specialized language centers.

Finally, the Ministry of Foreign Affairs has stipulated bilateral and multilateral agreements with several EU and non-EU States for the recognition of qualifications.

EVENTS

Bologna Children's Book Fair: <http://www.bookfair.bolognafiere.it/>
Salone Internazionale del Libro di Torino: <http://www.salonelibro.it/>

RESOURCES

- Italian Ministry of Education, University and Research, <http://www.miur.gov.it/>
- EACEA National Policies Platform, <https://eacea.ec.europa.eu/national-policies/eurydice/>
- Fulbright Italy, <http://www.fulbright.it/>
- Open Doors IIE, <https://www.iie.org/>
- Italian National MBA Association, <http://www.nova-mba.org>
- EducationUSA, <https://educationusa.state.gov/>

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JAPAN

Capital: Tokyo
Population: 126,168,156 (July 2018 est.)
GDP: \$4.873 trillion (2017 est.)
Currency: Yen (JPY)
Language: Japanese

UNESCO Student Mobility Number:

Japan has 31,702 students studying abroad and 49 percent of those students studied in the United States. The U.S. is followed by the United Kingdom (9.3 percent), Australia (5.5 percent), France (5.2 percent), and Canada (4.9 percent) rounding out the top study destinations for Japanese students.

<http://uis.unesco.org/en/uis-student-flow>

CIA World Factbook:

22.34% of the population is under 24 years old.

<https://www.cia.gov/library/publications/the-world-factbook/geos/ja.html>

OVERVIEW

During the 2017/18 academic year, Japan had the eighth largest population of international students studying in the United States. 18,753 Japanese students studied in the United States, which was a 0.1 percent decrease from the previous year.

Japan was the Number 1 country of origin for students to the United States from 1994 to 1998. Since then, Japan has fallen to eighth place due to a variety of circumstances including challenging economic conditions, Japan's low birth rate, the recruiting cycle of Japanese companies, and a surge of students from other countries. Japan's downward trend has shown signs of bottoming out as of the 2015/16 academic year. The United States remains the most popular destination for studying abroad. The U.S. Department of Commerce estimates that in 2017, Japanese students studying in the United States contributed \$627 million to the U.S. economy.

The globalization of Japan is one of the pillars of the Prime Minister's growth strategy. Prime Minister Abe announced the intent to double the number of bilateral exchanges between U.S. and Japan by 2020. More specifically, the Japanese Ministry of Education, Culture, Sports, Science, and Technology (MEXT) has set a goal to send abroad 120,000 Japanese university students and 60,000 Japanese high school students annually by 2020.

The Japanese school year begins in April and ends in March. The first term runs to around July 20. Exams are given at the end of each grading period. There are usually three breaks in Japanese schools during the academic year: the summer break (late July – August 30), winter break (late December – early January) and spring break (secondary education: late March - early April; higher education: late February – early April).

SUB-SECTORS

Higher Education

Academic Level	2016/17	2017/18	% Total	% Change
Undergraduate	9,095	9,190	49.0	1.0
Graduate Education	2,967	2,918	15.6	-1.7
Non-Degree	5,271	5,144	27.4	-2.4
OPT	1,447	1,501	8.0	3.7
Japanese students total	18,780	18,753	100	-0.1

According to "Community College Data Resource", during the 2017/18 academic year, Japan had the fourth largest population of international students studying in Community Colleges in the United States. 5,390 Japanese students studied in the United States, which was a 1.6 percent increase from the previous year.

Community College	2016/17	2017/18	% of Total	% Change
Japan (Ranked 4th)	5,305	5,390	5.7	1.6
World total	96,472	94,562	100	-2.0

(Source: *The Institute of International Education (IIE), 2018 Open Doors Report*)

MEXT has launched several initiatives for supporting study abroad. Starting in 2013, MEXT is taking a lead on "Tobitate!", a public-private partnership student study abroad program. This program aims to send approximately 10,000 high school and university students overseas by 2020 and offers financial support to selected students. This program will be accepting student applications until March, 2020. Please refer to the introductory video that describes "Tobitate!": <https://www.youtube.com/watch?v=eGFbGZG5UqM>

Starting in 2014, MEXT is providing financial support to 37 "Super Global Universities" through 2023 to help those schools internationalize. A list of schools, please refer to the video: <https://www.jsps.go.jp/english/e-tgu/selection.html>

TeamUp campaign is an Initiative funded by the U.S. Embassy Tokyo to increase student mobility by promoting strategic partnerships between U.S. and Japanese colleges and universities. The TeamUP RoadMap is a web-based, step-by-step guide for creating partnerships, and also has a matchmaking function. <http://teamup-usjapan.org/>

Secondary Education

School organized student trips are a typical Japanese tradition. The educational travel sector has great market potential as the demand for international school trips are increasing. Institutions, such as Super Global High Schools (SGH) and Super Science High Schools (SSH), are implementing study abroad programs and are looking for additional attractive short-term programs.

Super Global High Schools (SGH) project started in 2014. MEXT designated 123 SGH schools to implement curricula that will develop a new generation of Japanese students with the skills to compete in the global economy. For the five-year duration of the project, selected SGH schools consider studying abroad programs as a part of core elements. In 2019, the current SGH program will be reborn as the World Wide Learning (WWL) Consortium Project. There are 2 models: 1. Advanced Model (= WWL project): 10 hub schools will be selected. This project will be funded up to US\$1.6 million for the selected 10 schools. 2. Regional Model: 50 schools focusing on their community's growth and fostering resources to support the community collaborating with local industries, NPO, local colleges/universities. This project will be funded up to US\$4 million. The period of the programs is 3 years. For the full list of schools and further details, please refer: <http://www.sghc.jp/en/>

Super Science High School (SSH) project started in 2002 to enhance science education at the higher secondary level. For the three-year duration of the project, selected SSH schools receive increased funding and are encouraged to develop links with universities and other academic institutions. MEXT selects 26 high schools every year. For the list of school, please refer: <http://www.jst.go.jp/cpse/ssh/school/list.html>

The market for U.S. boarding schools is a niche opportunity. There is a steady number of wealthy families, who can afford to pay boarding school tuition, interested in boarding schools. Working closely with your partner agents would be the most effective way to tap into this market. There are a few Japanese agents that specialize in boarding school programs. CS Japan supports boarding schools' fairs, including The Association of Boarding Schools (TABS) and Linden Education Services.

Intensive English Programs

12,607 Japanese students participated in Intensive English Programs in the U.S. during the 2017 academic year. This represents a decrease in total number of students (from 13,511 in 2016), but average Weeks per Student went up over this period to 12.2 from 11.6. These programs are of increasing interest to Japanese students.

Online Programs

There are growing needs and Japanese people will continue to invest in improving their English through lower-cost options. However, the online English lessons market in Japan is already saturated with visible high-end players and lower-end online option providers. There are many English schools that operate one-on-one tutor-student/small group lessons in both classroom and online. These schools have a physical presence and extensive marketing campaigns in Japan. There are skype-based companies such as Rarejobs that have a huge share of the online English market in Japan. Rarejobs offers lessons at extremely cheap prices, making it difficult for newcomers to gain market share without investing significantly into establishing a local presence. The initial financial investment required to be noticed, and the marketing, general & administrative, and human resources costs are significant in Japan.

Professional Training Services

While the concept of globalization and improving English skills is regarded to be important, the allocation of financial resources and incentives have not followed. This makes it challenging for working professionals to truly invest the time and energy in learning and/or improving their English skills. This is coupled with the fact that Japan has been in long-term economic stagnation since the bubble burst in the early 90's. Japanese firms has been cutting outside training/education costs and started funding fewer employees for executive education abroad.

OPPORTUNITIES

The Japanese government is promoting measures to facilitate study abroad participation from the viewpoint of global human resource development, importance of personal interchanges with foreign universities, and globalization of the traditional insular Japanese society. There are potential opportunities for U.S. universities that market short-term offerings to Japanese students.

It is crucial to understand the English proficiency skills of Japanese students. U.S. universities/colleges need to take this condition in to consideration and consider relaxation of some TOEFL score requirement and customize programs to the tastes of Japanese students. The ability to offer conditional acceptances will be valuable in attracting student attention. Please also note that Japanese and U.S. academic calendars do not have a good fit. Japanese universities academic calendar starts in April and runs through late February.

Short-term (1-2 months study abroad) programs are the most popular in Japan because it makes the best use of summer/spring breaks. There are opportunities for U.S. universities/colleges to market attractive short-term program to Japanese students. Showing the direct benefits in relation to future career success encourages students to study in the United States. Service learning and/or volunteer activities to gain resume enhancing experience can be compelling reasons to enroll in a program. Some Japanese universities and education agents are looking for immersion into the English and cultural experience with native speakers while playing sports, music, dance and making friends in the U.S. colleges and universities.

One-semester to one-year study exchange programs with partner U.S. universities are also very popular in Japan. Partnering with Japanese universities is an effective way of entering the Japanese market. In recent years, many Japanese universities are looking for bilateral student exchange partners. Japanese universities are aware of difficulties in maintaining balance in terms of number of students in two-way exchange programs and they are interested in discussing new ways of facilitating student exchange.

Short-term (7-10 days) educational travel programs for high schoolers have great market potentials. Many Japanese high schools are interested in a unique study abroad programs, such as STEM-related programs including scientific field trips, interaction with faculties/students and companies/lab visits. The key to success would be tailored short term programs (STEM, art, entrepreneurial studies, robotics, music, sports, leadership, etc.) specifically for high school student travel. Information on homestay availability, exchange programs with local schools and other special programs students can join would be helpful. Additional resources such as the availability of Japanese guides at attractions would be welcomed. Super Global High School (SGH) and Super Science High School (SSH) that would be a good potential partner with U.S. education institutions.

EVENTS

The Association of Boarding Schools (TABS) "Boarding School Fair in Tokyo" in fall 2019: <http://www.boardingschools.com/>

Linden Education Services "World Boarding Schools and Summer Camp EXPO in Tokyo" in fall 2019: <http://www.boardingschooltours.com/our-fairs/times-venues-contacts.aspx>

Tokyo EducationUSA EXPO in September 2019: The U.S. Embassy Tokyo hosting the EducationUSA EXPO in cooperation with EducationUSA, the Japan-U.S. Educational Commission

(Fulbright Japan), U.S. College Alumni Network of Japan (USCANJ), KagakushaNet and Eiken Foundation of Japan. <http://americaexpo.jp/for-us-institutions/>

Osaka EducationUSA EXPO in September 2019: The U.S. Consulate General, Osaka-Kobe, and other constituent posts hosts EducationUSA Expo in various locations in Western Japan. There is no fee to participate in this public event: <http://americaexpo.jp/for-us-institutions/>

Western Japan College Fair in fall 2019 (TBD): The U.S. Consulate General, Osaka-Kobe will endorse the Western Japan College fair organized by Canadian Academy and Osaka International School of Kwansai Gakuin in fall 2019. The fair will feature about 100 Japanese and foreign universities including U.S. universities and attract international school students and local highschoolers.

RESOURCES

- U.S. College Alumni Network of Japan, <http://www.uscanj.net/>
- Ministry of Education, Culture, Sports, Science and Technology (MEXT), <http://www.mext.go.jp/en/>
- Ministry of Education, Culture, Sports, Science and Technology (MEXT), <http://www.mext.go.jp/en/>
- A list of existing exchange agreements at higher education level, http://www.mext.go.jp/a_menu/koutou/ryugaku/boshu/1346643.htm
- Japan Student Services Organization (JASSO): Japanese institutions offering programs in English, <http://www.jasso.go.jp/en/index.html>
- JAFSA, Japan Network for International Education, <https://www.jafsa.org/en/>
- Japan School Tours Bureau, <http://jstb.or.jp/> (Japanese website only)
- EducationUSA at American Center Japan (A-CJ), <http://americancenterjapan.com/;AmCtrJapan@state.gov>
- Fulbright Japan, <http://www.fulbright.jp/eng/index.html>

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KAZAKHSTAN

Capital:	Astana
Population:	18,744,548 (July 2018 est.)
GDP (USD):	\$159.4 billion (2017 est.)
Language:	Tenge (KZT)
Language:	Kazakh (official, Qazaq), Russian (official)

UNESCO Student Mobility Number:
Kazakhstan has 89,505 students studying abroad.

CIA World Factbook:
39.64% of the population is under 24 years old.

OVERVIEW

Higher Education

Kazakhstan's population reached 18.4 million in 2018. Ninety percent of the population completes secondary education or beyond and there is great importance placed on education both by the Government and the citizenry. Since Kazakhstan's independence in 1991, Kazakh nationals have taken increasing advantage of studying overseas with more than 100,000 (with China) students choosing to study outside of Kazakhstan.

At the moment, 477,074 students are enrolled into higher education institutions in Kazakhstan. There are 122 universities nationwide. The range of tuition fees in Kazakhstan is from \$1,000 to \$15,000 per year, primarily at American-style, English-language universities. More than 93% of the students are self-funded and approximately 6.7% are on state scholarships.

The local government intends to "optimize" higher education in Kazakhstan by limiting the number of higher educational institutions to 100, down from 150 (122???) (mostly private) universities through mergers, downgrading, and closures. This reform tightens licensing regulations and qualification requirements for universities to insure programs correspond to international standards.

145 000 students graduated from high-school in 2018, and the number will rise to around 200-250,000 students forecast to graduate annually by 2020. So, just as the Government of Kazakhstan reduces the number of universities, an unprecedented number of students will enter the market- creating opportunity for U.S. institutions with ties to Kazakhstan.

Since 2011, the Bolashak ("Future") scholarship program has provided scholarships for Master's and PhD programs. The most popular countries for study under the program are the UK, U.S., and Russia. Of the 229 educational institutions with Bolashak agreements, 47 are in the U.S. Academic Mobility Scholarship – another program introduced in 2011, aims to support 300 students in state or national universities to complete part of their graduate degrees abroad at an institutional partner university.

At the moment, fewer than 10% of potential Kazakhstani applicants are studying in the United States. Out of more than 100,000 students studying overseas, 90% are self-funded. In 2018 1,865 students from Kazakhstan are currently studying in the U.S. with 65% studying at bachelor's level.

In August this year, the government of Kazakhstan decided to let the currency, Tenge float leading to a sharp devaluation vis a vis the U.S. Dollar. Despite this, demand for education abroad is stable, albeit, causing a slowdown and a search for less expensive study options.

Training services

Training services offered by consulting companies have become more sophisticated and new areas such as management consulting, audits to IAS, GAAP and National standards, HR- and IT-consulting, manufacturing consulting, strategic planning and other professional services have appeared, reflecting the market developments and emerging needs of local businesses. Many international consulting industry giants and small businesses have entered the market which offers and opportunity for more U.S. companies to penetrate the market with their services.

International consulting companies, especially the “Big Four” corporations - Deloitte & Touch, Ernst & Young, KPMG and PriceWaterhouseCoopers are largely represented in Kazakhstan. Booz-Allen and Hamilton used to conduct their activities on a project-by-project basis and has now fully established offices in Astana and Almaty. Franklin Covey opened their office in 2010 on a license. Dale Carnegie established their office in March 2013 via a franchise agreement.

BEST PROSPECTS/SERVICES:

Education market

Education technology, boarding schools, technical and vocational education, English-language courses, and higher education are highlights for demand in this market. Per capita income of \$10,857.38 (2017) and a large disposable income of its population make Kazakhstan an attractive market for the U.S. education sector. Unlike the rest of Central Asia, Kazakhstan's per-capita GDP has been steadily increasing up until 2014, creating burgeoning middle- and upper-class youth eager to travel and study abroad. However, multiple currency devaluations in 2014 as well as in 2015 had a negative impact on Kazakhstani families. Nonetheless, government policy has dramatically increased English-language education nationwide over the past decade. Major multinationals regularly noted a “skills gap”, with an insufficient supply of up-to-date technicians, engineers, scientists and professional managers, which meant an increasing demand in education for related degrees.

Training services

The most demanded training services include management soft skills, English language skills as well as technical training for the oil and banking sectors, e.g. international accounting standards, or reservoir engineers. Specialists note growing demand for training services and HR management skills development for mid-level managers. This market potential is also estimated as prospective and is associated with the development of small and medium size companies engaged in the B2B sector.

Some experts believe that at present the role of strategic management is underestimated by private businesses in Kazakhstan, and predict that demand for these services will reach its peak within two or three years. At present, major consumers of strategic services are national companies undergoing frequent changes and requiring solutions on team restructuring, optimization and evaluation.

Following the 36% devaluation in 2015, companies are looking into focusing their hiring on local labor force. In cases where supply of professionals is limited, there is an increased trend for senior managers to be recruited from Russia, Belarus – largely thanks to free movement

of labor allowed under Eurasian Economic Union of Russia, Kazakhstan Belarus. There is still demand for soft skills and management training for Kazakhstan citizens.

Labor Market - Brief Overview

The Kazakhstan labor force (people aged 15-64) is approximately 9 million people in 2017. There has been a slight increase for both genders in terms of participation rates, for men up from 76% in 2000 to 78% in 2012 and for females from 65% to 68% in the same period according to the World Bank. Kazakhstan registers relatively low unemployment rates for international standards. Male unemployment averaged 4.3% and female unemployment about 6.4%. Youth unemployment rates (for those people aged 15-24) were slightly lower than those for the total population, that is, 3.8% for young males and 4.7% for young females in 2014-15. This is opposite to what normally happens in other parts of the world where youth unemployment tends to be higher than total unemployment. Higher educational attainment offers protection against unemployment in Kazakhstan.

OPPORTUNITY:

Education market

Networks are key resources to successfully enter the country and recruit effectively. These include education agents and institutional alliances that cooperate with school guidance counselors. This market is an agent-driven market and there are a number of qualified educational agencies that operate on the territory of Kazakhstan. A proper due diligence is recommended before establishing partnership relations.

Other activities, such as visiting schools, attending student fairs, holding seminars, and advertising campaigns, have become effective and important for recruitment. College guidebooks and catalogs are another way to introduce students from Kazakhstan to U.S. educational institutions. Parents as a target are an important segment of the market. Marketing materials need to be created to speak to parents. Internet and social networks are rapidly growing in Kazakhstan. The number of national users is approaching 10 million people.

Training services

A major share of solvent customers of international consulting firms now in Kazakhstan includes national companies, second-tier local banks, companies with foreign capital, and leading export-oriented giants.

EVENTS:

AKIEF 16th All-Kazakhstan International Education Fair

Date: January 27/29/31 – February 2, 2019

Website: <https://globusedu.kz/en/our-fairs/akief/>

Location: Rixos Hotel, Almaty

Radisson SAS Astana Hotel, Astana

Renaissance Hotel, Atyrau

Renaissance Hotel, Aktau

A2 International Education Fair

Date: February 2019, September 2019 (to be confirmed)

Location: Almaty, Astana

Website: <http://www.a2fairs.com/>

Begin Edu Fair
Date: February 13, 2019
Location: Renaissance Hotel, Atyrau
Website: <https://begingroup.com/en/fairs/begin-central-asia-tour/edu-fair-atyrau.html>

Begin Edu Fair
Date: February 14, 2019
Location: Renaissance Hotel, Aktau
Website: <https://begingroup.com/en/fairs/begin-central-asia-tour/edu-fair-aktau.html>

Begin Private School Fair Astana
Date: February 16, 2019
Location: Radisson Hotel, Astana
Website: <https://begingroup.com/en/fairs/chastnyie-shkolyi-za-rubezhom-kazakhstan/private-school-fair-astana-ii.html>

Begin Private School Fair Almaty
Date: February 17, 2019
Location: Ritz-Carlton Hotel, Almaty
Website: <https://begingroup.com/en/fairs/chastnyie-shkolyi-za-rubezhom-kazakhstan/private-school-fair-almaty-i.html>

WEBA Kazakhstan Agents Workshop
Date: February 17-18, 2019
Location: The Ritz-Carlton Hotel, Almaty
Website: <https://webaworld.com/event/kazakhstan/3.php>

Atakent-Expo Education and Career
Date: April 4-6, 2019
Location: Almaty (to be confirmed)
Website: <http://www.exponet.ru/exhibitions/by-id/careeral/careeral2019/index.en.html>

ALC2019 Asian Logic Conference
Date: June 17-21, 2019
Location: Nazarbayev University, Astana
Website: <http://www.alc2019.kz/>

WEBA Kazakhstan Student Fair Astana
Date: September 28, 2019
Location: Radisson Hotel, Astana
Website: <http://webaworld.com/event/kazakhstan/27a.php>

WEBA Kazakhstan Student Fair Almaty
Date: September 29, 2019
Location: The Ritz-Carlton Hotel, Almaty
Website: <http://webaworld.com/event/kazakhstan/27a.php>

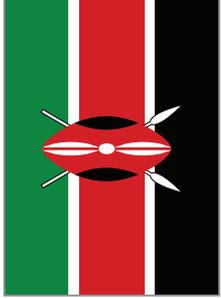
Atakent-Expo Education and Science of the XXI Century
Date: November 21-23, 2019
Location: Korme Exhibition Centre, Astana
Website: <http://www.exponet.ru/exhibitions/by-id/scienceaas/scienceaas2019/index.en.html>

RESOURCES:

- Kazakhstan's Ministry of Education and Science, www.edu.gov.kz/en
- Bolashak Scholarship Program, www.bolashak.gov.kz
- EducationUSA Kazakhstan, <http://www.educationusakazakhstan.org/>
- United States Commercial Service, <http://www.trade.gov/cs/index.asp>

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KENYA

Capital: Nairobi
Population: 48,397,527 (July 2018 est.)
GDP: \$79.22 billion (2017 est.)
Currency: Kenyan Shilling (KES)
Language: English (official), Kiswahili (official)

UNESCO Student Mobility Number:
 Kenya has 14,012 students studying abroad.

CIA World Factbook:
 58.64% of the population is under 24 years old.

OVERVIEW

Education has continued to play a pivotal in the country's development, with its demand increasing by the day. Due to the importance of education in the country, the Government spends 20 per cent of the National Budget on Education. In a televised address to the Nation the Precedent Uhuru Kenyatta recently declared that the Government would set aside about 30% of the National Budget for education, arguably the highest budgetary allocation for education in Africa. After several education commissions and conferences over the years, the Ministry of Education, Science and Technology has identified

Both local and foreign investors are setting up educational institutions, including those offering British, American and other curriculum. The government has prioritized the expansion of public secondary schools and also identified centers of academic excellence in every county. Hence, funds are being channeled to existing public high schools for expansion rather than initiating fresh learning institutions. Consequently, schools that hitherto had three or so streams are now being expanded to have extra streams and dormitories to accommodate more learners and meet the high demand for secondary education.

The Government however lacks the financial capacity and technical expertise to implement all the above initiatives. Hence, aid agencies like UNICEF, USAID, World Vision, JICA, among others, have contributed significantly to the expansion and development of education in the country, especially in public institutions.

SUB-SECTORS

Higher Education

(include statistics from 2018 Open Doors Report in this section – (i.e. how many students studying in the U.S., courses of study, graduate or undergraduate, increase or decrease from previous year, etc.) 3322

- **Undergraduate:** 1,931
- **Community College:** 55
- **Graduate Education:** 922
- **Secondary Education:** *Demand for secondary education*

SECONDARY EDUCATION

Demand for secondary education

The education sector has grown considerably over the years. There is an increased number of public and private schools that offer the British, North American and Kenyan (8.4.4) curricular. In addition, there is a German, a Swedish and A French school. A couple of schools also offer the International baccalaureate curriculum. Some of the newly constructed schools include

Brookhouse Schools (Runda Campus), GEMS Nairobi International School (Runda), Crawford School and Sabis International School, Woodcreek School; and Nova Academies.

While most international schools in Kenya are based in Nairobi, new ones are emerging that are indigenously owned and are located in the outskirts of Nairobi. The increment of the number of international schools is pointer to the rising demand for an international education. Nairobi has become a hub of international trade, diplomatic missions and international non-governmental organizations. Consequently, there are more foreign investors, diplomats and expatriates living in the country, hence the need for international education for their children and other dependents. Besides, Kenya has some of the most qualified and competent teachers and strongest educational systems or learning institutions in the region. There is also an emerging middle class who are inclined to have the very best education for their children. The practice has traditionally been that those who pursue British, US, IB and other international education systems in Kenya largely end up pursuing higher education abroad (mostly in the US, UK, Canada, Australia, and the EU Region). However, students are now getting more and more interested in study destinations where they can acquire post-study visas. The US reportedly gives post-study visas to those taking STEM courses while Canada is more liberal, hence the high interest in Canadian institutions.

It is worth noting that the demand for US and other foreign education is not a preserve of international school system. There are thousands of affluent parents whose children or wards are learning in public schools but still opt to pursue undergraduate studies abroad. Other students whose parents may not be so affluent still seek education abroad on scholarship and other sources of funding.

There are over 25,000 public primary schools in Kenya with an enrolment of about 9.5 million learners as at 2011 and over 600 private schools. Primary school completion rate stands at about 76.8% while transition rate from primary to secondary stood at 73.5% by 2011. The last decade seen a significant increase in the demand for secondary education. The existing secondary school places cannot adequately meet the demand for secondary education, thus some learners are forced to join technical and vocational training institutions or drop out of school altogether.

Online Programs

E-learning is a new development in the country, though the level of usage does not cover all levels of education. Most universities have adopted E-learning as an alternative to face-to-face lectures. Secondary schools, especially private schools, are in the process of implementing online learning to complement classroom interaction. However, there are still glaring challenges in implementing this mode of learning since there is lack of qualified personnel to run online pedagogy, not to mention the high cost of installing computer software and hardware. The Ministry of Education, Science and Technology is currently running pilot training program in selected counties to build the capacity of teachers in both primary and secondary schools in the country, with the aim of implementing an E-learning system as recommended by the new curriculum. However, progress in this sector is still very slow and hit by such hitches as lack of funding, bureaucratic red tape and shortage of technical expertise.

Some private schools have, however, managed to implement E-learning programs, though not fully, using such platforms as Google Classroom and Edmodo. At the same time, several universities, both public and private, have introduced E-learning programs for selected faculties, especially in the liberal arts. E-learning programs are prevalent at Daystar University, Kenyatta University, Nazarene University, among others. The universities largely use blended learning, which is a breed between online learning and on-site teaching-with the bulk of the lectures delivered online.

Even though internet penetration in Kenya is among the highest in Sub-Saharan Africa, E-learning has not grown so much for the reasons stated above. However, there is a possibility of fast growth in this area since an increasing number of Kenyans are computer literate, especially those living in urban areas.

Research and Development

There are concerted efforts by various stakeholders in education-both private and public-to improve education in the country. The Kenya Institute of Curriculum Development (KICD) is the public-funded curriculum developer in Kenya and it works with other educational parastatals under the Ministry of Education, Science and Technology and non-governmental organizations to review and develop the national curriculum, provide teaching/learning materials, build the capacity of teachers and develop infrastructure. The Kenya Examinations Council (KNEC) is the main public-funded examining body for middle-level colleges, secondary and primary schools as well as some foreign examining bodies that use it as an agent to supervise international examinations that are administered locally.

Apart from the parastatals affiliated to the Ministry of Education such as KICD and Kenya Institute of Government (KIG), most education research is done by universities. In addition, there is Forum for African Women Educationalists (FAWE), whose mandate is to promote access, retention and improving the quality of education for girls. There is also the Kenya Private Schools Association (KPSA), the umbrella body for private schools in the country. The number of schools registered with KPSA across the board is as follows: 257(kindergarten); 7398(primary); and 1617(secondary).KPSA collaborates with non-governmental organizations and the Government to sustainably coordinate, mobilize and regulate all private institutions of learning in a bid to provide holistic and relevant quality education for all in line with Kenya's Vision 2030 economic blueprint. In addition, the government collaborates with various agencies and diplomatic missions to help in the development of education in Kenya. Some of the said agencies include UNESCO, DfID, British Council, UNICEF, USAID, JICA, among others. The latter agencies have been instrumental in funding the free and universal education program at basic education level (from kindergarten to secondary school) among other development projects across the education spectrum, but largely targeting basic education. In addition, Education USA Advising Center based at the United States Embassy in Nairobi, provides updated and non-partisan information on US higher education to the public and continues to guide qualified students through the application process. The services provided by the center range from application to pre-departure.

American organizations like International Universities Alliance (IAU) and Shorelight partner with US universities and local recruitment agencies to expedite the application process and build the capacity of careers counselors, especially those in international schools. The IUA builds meaningful connections and opportunities to provide access for international students across the world to a first-rate academic education and the skills to compete in a global environment.

The IUA, Navitas, Kaplan and INTO are collaborating with government sponsors and other

funding institutions worldwide to build a placement and retention ecosystem to help increase student mobility and access to prestigious degree programs in the U.S. These organizations are already working with institutions and university placement agencies in Kenya and the rest of Sub-Saharan Africa.

Professional Training Services

Professional training services are offered in the educational sub-sector in several form: insets, seminars, short courses and longer courses ranging from one-year certificate courses, two-year diplomas up to graduate and postgraduate courses lasting four or three and two years, respectively. Local universities have initiated market-driven courses commonly known as Module II or parallel programs, which are mainly self-sponsored by the learners from various sectors of the economy.

Various government departments have their own organizations within the parent ministry or state department that offers professional training services. In addition, there are private institutions such as Kenya Institute of management (KIM) which provide professional training services at a fee. For instance, teachers of students with special needs are trained by the Kenya Institute of Special Education (KISE); while head teachers and those in other management positions get professional training through Kenya Education Staff Training Institute (KESI). Individual schools also organize their own insets/workshops internally with experienced members of staff, departmental heads or hired consultants as facilitators.

OPPORTUNITIES

Given the visa issuance constraints described above and the high cost of US education (an average Kenyan will hardly pay tuition fee of \$10,000 annually), online learning is a better and more affordable alternative to learning on-location in the United States.

The latest report on International Education Exchange produced by the Institute of International Education (IIE), released in November 13, 2018, in partnership with the Bureau of Educational and Cultural Affairs, US Department of State, reveals that there are 1,094,792 enrolled in US learning institutions in the 2017/2018 academic year, an increase of 1.5%. Between 2000 and 4000 Kenyan students enroll in US institutions annually (Open Doors Report, 2018). However, the Fall Snapshot Survey conducted by 10 Higher Education partners unearthed the following scenario: overall enrollment in US institutions remains flat, with a 2% decline in new enrollment; new enrollment declines vary among institutional characteristics and location; while institutions are responding to current landscape through outreach, recruitment and advocacy. The Open Doors Report 2018 further outlines what attracts international students to the US learning institutions: high quality academic experiences; personal and professional growth, including close interaction with professors conducting cutting-edge science, research and innovation; affordability; post-study opportunities; and skilled migration policies.

There is a huge demand for study opportunities abroad in general. While in the recent past the focus has been on UK education, attention is now quickly shifting to North American destinations of USA and Canada for higher education at both undergraduate and postgraduate levels. US education is valued for its quality programs, fast completion rates and the massive high-caliber training infrastructure that makes learning enjoyable and easy. However, not many applicants to US universities are able to meet the requisite study visa conditions. The main reason for visa denials or obstacle to pursuing US education has perennially been that the affected applicants are not able to produce evidence of social and economic ties with their home country, thus they are basically labeled as economic immigrants. Indeed, for these very economic reasons, majority of Kenyans who manage to go to study in the US attempt

to change their status for one reason or the other, while others simply vanish after or even before completing their studies. It is instructive that international students make up 5.5% of all students in US higher education, with California, New York, Texas and Massachusetts as the most popular destinations (Open Doors Report, 2018). The total revenue pumped into the US economy amounts to 42 billion US dollars.

The Open Doors Report 2018 further reveals that Engineering, Business and Management, Math and Computer Science are the top fields of study among international students in the US, with 21% of them majoring in Engineering. The distribution of the disciplines that international students are currently pursuing in the US is as follows: Engineering(21.3%); math and Computer Science(17.0%); other STEM courses(11.5%); Business management(17.9%); Social Sciences(7.6%); Fine and Applied Art(5.8%); Intensive English(2.4%); undeclared and other courses(16.5%).

EVENTS

Major Education Fairs, etc.

EDUCANADA FAIR - 18 & 19 January 2019 – Nairobi

AUSTRALIA EDUCATION FAIR

UK UNIVERSITIES FAIR - 18 & 19 January 2019 - Nairobi

CIS TOUR – 3 -13 April 2019 – Nairobi & Mombasa

BRITISH COUNCIL FAIR

BROOKHOUSE GRADUATES FAIR

UNIABROAD SCHOOLS TOUR

EXPRESS COMMUNICATION: Nairobi International Education & Career Fairs

RESOURCES

There are a number of organizations that provide in-country support for the education sub-sector in Kenya. The said organization work closely with county governments, community-based organizations, as well as the Central Government through the Ministry of Education, Science and Technology. The names and URLs of organizations providing in-country support include, but are not limited, to the following:

- United Nations Educational, Cultural and Scientific Organization (UNESCO), <https://en.unesco.org/countries/kenya>
- CIA World Factbook, <https://www.cia.gov/library/publications/resources/the-world-factbook/geos/ke.html>
- Kenya Institute of Special Education (KISE), <https://www.kise.ac.ke/>
- DFID-Kenya/British High Commission, <https://www.gov.uk/world/organisations/dfid-kenya>
- US Agency for International Development (USAID), <https://www.usaid.gov/kenya>
- World Vision International (WVI), <https://www.wvi.org/kenya>
- Federation of African Women Educationalists (FAWE), <http://fawe.org/home/>
- United Nations International Children's Emergency Fund (UNICEF), <https://www.unicef.org/kenya/>
- International Livestock Research Institute (ILRI), <https://www.ilri.org/kenya>
- Kenya Medical Research Institute (KEMRI), <https://www.kemri.org/>
- Education USA Nairobi/US Embassy in Kenya, <https://ke.usembassy.gov/education-culture/educationusa/>
- British Council Nairobi, <https://www.britishcouncil.co.ke/>
- Kenya National Commission for UNESCO, <https://unesco.go.ke/>

- Kenya Institute of Curriculum Development (KICD), <https://kicd.ac.ke/>
- Kenya education Staff Institute (KESI), <http://www.scac.go.ke/2015-02-16-09-44-25/training-and-research/79-kenya-education-staff-institute>
- Kenya Education Management Institute (KMI), <http://kemi.ac.ke/>
- Kenya School of Government (KSG), <http://www.ksg.ac.ke/>
- Kenya Private Schools Association (KPSA), <https://kpsa.co.ke>
- Japan International Cooperation Agency (JICA), <https://www.jica.go.jp/kenya/english/>

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MALAYSIA

Capital: Kuala Lumpur
Population: 31,809,660 (July 2018 est.)
GDP: \$312.4 billion (2017 est.)
Currency: Ringgit (MYR)
Language: Bahasa Malaysia (official)

UNESCO Student Mobility Number:

Austria has 64,187 students studying abroad according to UNESCO.

CIA World Factbook:

44.22 % of Malaysia's population is under 24 years of age.

Malaysia is ranked 21st in the total number of students sent to the U.S. for higher education. According to Open Doors 2018 "Fast Facts" for 2017/2018 school year, there was an increase of 0.3% from 8,247 Malaysia students studying in the U.S. to 8,271. Most Malaysian students in the U.S. study at the undergraduate level. The breakdown in 2017/18 is as follows: 70.3% undergraduate, 13.5% graduate, 1.4% non-degree and 14.8% Optional Practical Training.

OVERVIEW

In the 2017-2018 academic year, Malaysian students in U.S. colleges and universities contributed USD 329 million to the U.S. economy.

The primary source of funding for Malaysian students is personal and family. Malaysian students are generally known to be good and serious students. As a result, they typically receive U.S. academic scholarships, either upon entry or soon after. The secondary source of funding for Malaysian students is Malaysian government and private corporation scholarships. There are access criteria to the secondary source of funding. Successful Malaysian government scholarship applicants must be accepted into TIMES Higher Education (T.H.E) World University Ranking Top 100 schools to have access to these funds. T.H.E. is part of the Thomson Reuters group. Due to continued USG commercial diplomacy efforts, the Malaysian government is willing to explore other alternatives in addition to the Top 100 educational institutions in the T.H.E. ranking.

Top international education destinations for Malaysian students other than the U.S. are Australia, the United Kingdom, Egypt, Jordan, Indonesia, China, Taiwan, Russia, New Zealand, India, Netherlands and Japan, with the majority going to Australia and the U.K.

SUB-SETS

MARKET DATA

International Education Overview	2015/16	2016/17	2017/18
Number of Malaysian Students in U.S.	7,834	8,247	8,271
Percentage of Change from Previous Year (%)	8.3	5.3	0.3

International Education Overview	2015/16	2016/17	2017/18
Ranking in Places of Origin for Students going to the U.S.	22	21	21

Source: Open Doors Reports

Higher Education

Traditionally, the four main fields of study for Malaysian students to the U.S. are Engineering (26.7%), Business (17.7%), Physical/Life Sciences (12.6%) and Social Sciences (11.3%). In recent years, there is marked interest in a specific field of study: Actuarial Science. Liberal Arts traditionally is not a draw as Malaysian students and parents place heavy emphasis on marketability and the ability to earn a living immediately after graduation as part of their selection criteria. Other considerations for students are cost, geography, religious and dietary similarities, and education under the British Commonwealth legacy.

Although the 4-year university undergraduate market is still the main growth opportunity, increasingly, we are seeing more associate, graduate as well as post-graduate degrees gaining interest from Malaysian students. Additionally, Optional Practical Training involving internships either pre or post-completion of degree is gaining market traction as well.

OPPORTUNITIES

Malaysia aspires to be a regional and international education hub. Towards this end, the Malaysian government is strongly encouraging international education partnerships and collaboration, and is also pushing the Malaysian public and private higher education institutions to become more research oriented. Twinning between Malaysian and foreign institutions [2+2 (i.e. two years in Malaysia followed by two years study in the U.S.), 3+1, and 4+0], and foreign education institution branch campuses are various forms of collaboration opportunities.

EVENTS

Star Education Fair. January 5-6, 2019. Kuala Lumpur Convention Center
 Facon Education Fair. March 17-19, 2019. Kuala Lumpur Exhibition Center
 Higher Education Fair. August 3-4, 2019. Mid Valley Exhibition Center

RESOURCES

- Education USA/ Malaysian-American Commission on Educational Exchange, www.macee.org.my

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MEXICO

Capital: Mexico City
Population: 125,959,205 (July 2018 est.)
GDP: \$1.151 trillion (2017 est.)
Currency: Peso (MXN)
Language: Spanish

UNESCO Student Mobility Number:
 33,854 Mexican students studying abroad.

CIA World Factbook:
 43.96% of the population is under 24 years old.

OVERVIEW

Mexico has taken a leading role in international education, fostering student mobility and academic exchanges with institutions abroad, to become more competitive in the international market. IIE Open Doors® latest report shows that Mexico is the ninth largest country of origin for students studying in the United States, despite an 8.1% decrease from previous year. In academic year 2017/2018, 15,468 Mexican students were enrolled in U.S. schools, mostly in undergraduate programs, contributing USD 633 million to the U.S. economy. In 2014, the U.S. and Mexican government implemented a bilateral education collaboration project called the U.S.-Mexico Bilateral Forum on Higher Education, Innovation and Research (FOBESII), to expand opportunities for educational exchanges, scientific research partnerships, and cross-border innovation to help both countries develop a 21st century workforce for mutual economic prosperity and sustainable social development. Through FOBESII, the U.S. and Mexican Governments have brought together the public and private sectors, as well as the education community, to promote educational and research cooperation with U.S. institutions, as well as improving access to quality post-secondary education to underserved demographic groups in the science, technology, engineering, and math (STEM) fields. Among the Forum's main achievements after four years of strong collaboration, are the signing of more than 115 collaboration agreements between higher education institutions in Mexico and the United States, as well as joint projects and programs in innovation and research implemented by the National Council of Science and Technology (CONACYT) and the National Science Foundation (NSF). Finally, as part of the Mexican education model, technology plays a key role in providing learning tools to students and enables students to have a more interactive experience in class and at home. Although there are many areas for improvement, the Mexican Government, through the Secretariat of Education and private educational institutions, are investing in equipment and technology solutions such as software, applications, and digital content in English to improve the education experience at all levels.

SUB-SECTORS

Higher Education

Mexico is the ninth largest country of origin for students studying in the United State with 15,468 students enrolled in U.S. institutions. In general, Mexican students choose U.S. institutions for the prestige of the American higher education system as well as the strong ties between both countries.

Academic Level	Students from Mexico
Undergraduate	8,802
Graduate	3,839
Non-degree	1,137
OPT	1,690

Undergraduate

Over eight thousand Mexican students are enrolled in U.S. Universities for undergraduate programs, mainly looking for innovative academic programs in STEM disciplines (science, technology, engineering and math.) Also, students are interested in developing strong multicultural skills to be competitive in the international market.

Community College

Given FOBESII's focus on workforce development, opportunities for community colleges are also rising, especially among Mexican students who are looking for educational opportunities at a younger age or are interested in two- year programs. Mexico's community college equivalent, its Universidades Tecnológicas system, features several bilingual technical universities that are particularly interested in exchange opportunities given that the classes are taught in English.

Graduate Education

For graduate education, Mexican students are looking for programs that can provide them with the abilities to perform in the international arena, given that Mexico has a strong international business presence. Mexican students are interested in different fields such as aerospace, environment, business, education, IT among other specialties. It is important to mention that Mexican institutions are interested in developing collaborative programs with U.S. institutions in the graduate level, to make international graduate education more affordable to their students.

Secondary Education

Given the strong ties with the United States, Mexican families seek academic opportunities in U.S. boarding schools mostly from 10 to 12 grades, as well as short term programs to increase English language skills. It is important to mention that the main competitor in this segment is Canada, followed by the UK; therefore, it is highly important to work with local partners to promote U.S. boarding education opportunities.

Online Programs

Mexican higher education institutions (public and private) offer online programs in undergraduate/graduate and short specialty programs. Mexican students prefer to take online programs in their own language. A strategy adopted by some U.S. institutions has been to offer blended courses, where once a month, a facilitator travels to country and meets with the local students to solve questions about the monthly lessons.

Research and Development

Research and Development has an important role in the development of both countries; public and private sector players from the U.S. and Mexico have developed a strong collaboration to promote joint research projects to increase regional competitiveness as well as stronger relationships between industry, government entities and educational institutions. The Mexican government through the National Council of Science and Technology coordinates a large number of research projects between Mexican and U.S. institutions.

Professional Training Services

Workforce and professional training are also provided by employers. With an eye to global competitiveness, employers and economic development organizations are interested in training opportunities for the Mexican workforce. Employers in Mexico seek training to improve their business processes, reduce costs, improve the effectiveness of their workforce, innovate, and strengthen their relationship with clients. Customized training in IT technologies, quality control, management, and language programs are in high demand. In addition to traditional training methods, Mexico is investing in technology and opening the market for on-line or blended courses.

OPPORTUNITIES

Six key opportunities to explore in the Mexican market are:

- ESL programs for students, both short-term and potentially longer courses of study to address Mexico's critical shortage of English-language teachers•
- Student recruitment for undergraduate and graduate programs for STEM disciplines (science, technology, engineering and math), aeronautical sciences, business administration, environment/energy, agriculture, and design
- Collaborative programs for technical/vocational programs in engineering and technology
- Dual-degree programs and collaborative programs in international business and management, engineering, environmental technology, and aerospace at the undergraduate and graduate levels
- Corporate training programs in management, as well as executive-level language proficiency programs
- Technology applied to K12 education, including applications, software, and digital content

To pursue these opportunities, we highly recommend traveling to Mexico and participating in recruitment fairs. You should visit schools to promote educational opportunities as well as to build relationship with education organizations and Mexican grant institutions. Also, secondary markets offer opportunities to recruit students—smaller geographic regions in Mexico are growing where students are seeking quality education programs abroad.

Successful U.S. training companies have partnered with Mexican institutions/universities to develop continuing education programs. However, training companies need to be flexible and sensitive to the specific characteristics of the Mexican market. The demand is for tailor-made programs conducted in Spanish. Technology companies are encouraged to work with a partner in country.

EVENTS

U.S. – Mexico Academic Mobility Fair: this recruiting fair organized by Education USA and the U.S. Mexico Commission for Educational and Cultural Exchange (COMEXUS) takes place twice a year (summer/fall) at various locations around Mexico. You can find this and related events at the Education USA website at <https://educationusa.state.gov/find-event>.

Mexico College Fair Tour, October 2019: visiting the Mexican cities of Chihuahua, Torreón, Tampico, Puerto Vallarta, Guadalajara, Querétaro, Monterrey, and Mexico City. <https://sites.google.com/site/mexicocollegefairtour/home>

EduExpos Mexico Tour: <https://eduexpos.edufindme.com/>

Linden Educational Services Boarding Tours: <http://www.boardingschooltours.com/>

The MBA Tour: www.thembatour.com

Education Technology Fairs

- Bett Latin America Mexico City, Mexico, <https://latam.bettshow.com>
- Global Educational Supplies & Solutions (GESS) Mexico City, Mexico, www.gessmexico.com

RESOURCES

- Education USA, www.educationusa.state.gov
- Mexican Secretariat of Education, www.sep.gob.mx
- National Association of Universities and Higher Learning Institutions, www.anuies.mx
- U.S. Embassy education and English programs, <https://mx.usembassy.gov/education-culture>
- COMEXUS–Fulbright–García Robles Scholarships, www.comexus.org.mx
- Consejo Nacional de Ciencia y Tecnología (CONACYT), www.conacyt.gob.mx
- Consortium for North American Higher Education Collaboration, www.conahec.org
- Peace Corps in Mexico, www.peacecorps.gov/mexico
- 100,000 Strong in the Americas Innovation Fund, www.100kstrongamericas.org

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NEW ZEALAND

Capital: Wellington
Population: 4,545,627 (July 2018 est.)
GDP: \$201.4 billion (2017 est.)
Currency: New Zealand Dollar (NZD)
Language: English (de facto official)/Maori (de jure official)

UNESCO Student Mobility Number

New Zealand has 5,580 students studying abroad according to UNESCO.

CIA World Factbook

32.78% of New Zealand's population is under 24 years.

OVERVIEW

The United States is the second most popular study destination for New Zealand students, after Australia. During the 2017/18 academic year, 1,785 New Zealand students chose to study in the United States – an increase of 34% over the past five years. Most of this increase is attributed to students pursuing undergraduate degrees and Optional Practical Training studies related to their academic field after their degree studies.

California, New York, Massachusetts, Pennsylvania and Hawaii are currently the most popular destination for New Zealand students. However, New Zealand students are currently studying in all 50 U.S. states, and at more than 450 U.S. higher education institutions.

OPPORTUNITIES

College Athletics

The opportunity for student athletes to earn an athletic scholarship is a key driver for undergraduate students interested in studying in the United States. New Zealand is a top-10 sending country for student athletes. Currently there are more than 200 New Zealanders student athletes studying at NCAA Division I and II schools. The top sports for New Zealand student athletes are recruited for are soccer basketball, rowing, swimming and tennis.

Short-Term Study Abroad Programs

One-two semester study abroad programs are popular with New Zealanders who want the experiences that come with studying abroad but are not looking to go abroad for their entire degree.

Graduate Studies

Students from New Zealand are interested in pursuing advanced degrees at U.S. higher education institutions in the fields of law, business management and advanced science degrees.

MARKET ENTRY

Clear communication is important in bridging the geographical distance between the U.S. higher education institutions and potential students from New Zealand.

Websites and digital content

Websites and digital content are going to play a prominent role in the decision-making process for international students looking to study abroad. Since potential students from New Zealand are unlikely going to have the opportunity to tour your campus in person, making sure that your school's website and digital media offer genuine insight into your institution.

- Storytelling: Video content offering virtual tours and interviews are excellent ways to help build emotional connections between your institution and potential students.
- Alumni focus: Highlighting your alumni from (or currently working in New Zealand) are also ways to highlight how their time at your institution prepared them for their current jobs.

Armchair Recruitment

Your university alumni in New Zealand are most likely going to be your institutions most enthusiastic supporters. Utilizing local alumni as brand ambassadors, is a low cost-approach with a strong rate of return. Engaging your alumni network to give talks, give interviews, participate in recruitment activities are important in geographically remote markets like New Zealand.

Social Media

New Zealand students are regular users of Facebook, Instagram and Snapchat, for example highlighting your alumni in social media postings and marketing material are helpful when recruiting students from New Zealand.

School Counselors mainly use Facebook and e-mail for their communications.

EVENTS

EducationUSA New Zealand University Expo: <https://www.facebook.com/events/291457641696206/>

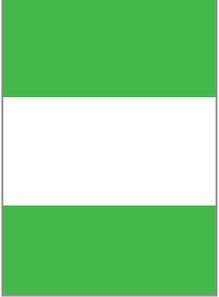
EducationUSA New Zealand IC3 Regional Forum: <https://www.facebook.com/events/239925373365081/>

RESOURCES

- Institute of International Education: <https://www.iie.org/>
- EducationUSA centers in New Zealand: <https://nz.usembassy.gov/education-culture/us-educational-advising/>
- New Zealand Qualifications Authority: www.nzqa.govt.nz
- SiNews: <https://www.studyinternational.com/news/a-story-with-a-friendly-face-the-challenge-of-recruiting-international-students/>

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NIGERIA

Capital: Abuja
Population: 203,452,505 (July 2018 est.)
GDP: \$376.4 billion (2017 est.)
Currency: Nairas (NGN)
Language: English (official)

UNESCO Student Mobility Number:

Nigeria currently has 89,094 students (12,693 studying in the U.S., with a 1.3% decline in Nigerian students who gained admissions in 2017/2018) studying abroad (2016/2017)

CIA World Factbook:

Nigeria's young population (0 – 24 years) is 62.26%, with a youth literacy rate of 72.79% for the reviewed demographic and a median age of 18.4 years.

OVERVIEW

Nigeria has a population of 203 million people with an estimated growth rate of 2.34%. The country has a GDP growth rate of 1.5% Year-on-Year and a GDP Per Capita of \$2,412.41. Nigeria's currency is the Naira which currently exchanges at the rate of N361 to \$1. There is a growing middle and elite class with international exposure, educational preference, disposable income and affluence. Nigeria currently ranks as the 13th International Student place of origin for U.S. institutions.

Nigeria had a 1.2% Year-on-Year growth rate of International Student interest in the U.S. (8.4% change). Nigerian students have a strong focus on science, technology, engineering, mathematics. There is a growing interest among students in arts and other related courses. Nigeria has a high sports focus for physical, emotional, social and psychological development. In 2018, 110 Nigerian students were awarded scholarships worth \$5.3 million (about N2billion) by more than 15 leading U.S. universities for the Fall 2018 calendar year.

Nigeria is an English-speaking country having been colonized by the United Kingdom. English remains the educational and transactional language. Over 450 languages are spoken in Nigeria with the major tribes being Yoruba, Ibo and Hausa.

Educational transcripts are globally accepted making acceptance easier. English proficiency tests, SATs, GMATs, etc. are taught and administered locally and are a pre-requisite to obtaining admission from international schools.

Most Nigerian schools operate a K – G12 model with Boarding options.

Nigeria has several faith-based schools spread across the country.

Sector	Percentage By Sector	% Change in Sector (2016/2017 and 2017/2018)
Undergraduate	46.4%	1.5%
Graduate	37.5%	12.3%
Non-Degree	1.4%	-23.5%
OPT	14.7%	29.8%

SUB-SECTORS

Top Areas of Study for Nigerian Students

Major Field of Specialization	2016/2017
Business and Management	13.7%
Education	2.0%
Engineering	23.3%
Fine and Applied Arts	3.0%
Health Professions	13.0%
Humanities	2.3%
Intensive English	0.3%
Math/Computer Science	10.4%
Physical and Life Sciences	12.0%
Social Sciences	6.6%
Other Fields of Study	12.3%
Undeclared	1.1%

BEST PROSPECTS

- Four-year universities/colleges with top choice programs:
 - Science, Technology, Engineering & Mathematics
 - Business Management
 - Finance
 - Arts
- Community Colleges – growing sectors
- High schools/Boarding schools – growing sectors

MARKET SNAPSHOT

Education remains a key sector of focus for the Nigerian government. There were \$1.21billion allocated in the 2018 budget towards education. There is a renewed government focus on education and suggestions have been made to allocate 26% of the national budget to

education - to cover infrastructure development in the sector and improve human capital. The top government priorities for the next 10 years include Human Capital Development, Infrastructure, Energy & Power.

OPPORTUNITIES

- Large prospect pool (Undergraduate, Graduate, Non-degree, Community Colleges) – There are over 300 combined Public and Private institutions of higher education; Universities (41 Federal Universities, 47 State Universities and 75 Private Universities), Polytechnics, Specialized Technology Colleges, Colleges of Education, Public and Private High Schools, Faith Based schools, which provides a large pool of talent and ready source of students with high interest across all education sub-sectors of U.S. study.
- Specialized trainings, Skill Development and Empowerment Initiatives - Education franchises, professional and industry specific training to support services (Power Generation/Distribution, Oil & Gas, Financial services, ICT, Coding & Robotics, Entrepreneurship Development programs) as well as local content initiatives have a lot of potential in Nigeria. There is significant demand for continuing education for Nigerian professionals and the academics, which make this a sub-sector best prospect.
- Infrastructure Development - Given the poor state of educational facilities in Nigeria there is a rapid growth in private investment in education (building design and construction), laboratory equipment, books, and professional textbooks would continue to gain market position.

EVENTS

- StudyMaine Education Consortia Trade Mission – Multi-country stop (Nigeria, Ghana & Kenya) February 2019
- Focus: Boarding Schools, Community Colleges, 2-year Colleges
- EducationUSA Recruitment Fairs
- Focus: Universities
- USA Trade Fair – Conference, Exhibition and B2B Meetings (multi-sectoral) – May 21st to 23rd, 2019
- Focus: New-to-market and Existing Business Interests

RESOURCES

EducationUSA

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Website: <http://educationusa.state.gov/>

The Fulbright Commission

U.S. Embassy Abuja,
Plot 1075 Diplomatic Drive,
Central District Area, Abuja, Nigeria
+234-9-461-4000
CulturalAbuja@state.gov or CulturalLagos@state.gov

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ACCESS NIGERIA
...AFRICA'S LARGEST MARKET!

at the USA FAIR
Exhibitions | B2B Meetings | Conferences
May 21 - 23, 2019
LAGOS, NIGERIA

USA FAIR 2019 presents American manufacturers, suppliers and service providers with product and company showcase opportunities to this most dynamic market on the African continent!

WHY NIGERIA?

- Most populous country in Africa – about 200 million people!
- Largest GDP in Sub Saharan Africa (SSA) - \$376 billion!
- Huge infrastructure deficit requiring US technologies & services
- Gateway to other West African markets
- Growing demand and affinity for US products and services
- Largest export destination for the US in SSA

EVENT DATE & LOCATION:
MAY 21 - 23, 2019
EKO CONVENTION CENTER
VICTORIA ISLAND, LAGOS, NIGERIA

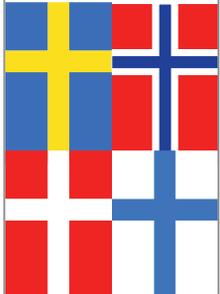
EVENT SCHEDULE:
Tuesday May 21, 2019 (Exhibitions, Company presentations, Welcome reception)
Wednesday May 22, 2019 (Exhibitions, Company presentations)
Thursday May 23, 2019 (Targeted B2B meetings)

PARTICIPATION FEE IS \$2000 WHICH COVERS:

- ✓ 3x3m booth space for 2 days exhibition
- ✓ Complimentary coffee/tea and lunch daily
- ✓ Up to 4 targeted B2B meetings with Nigerian companies
- ✓ Business networking reception hosted by the US Consul General
- ✓ Opportunity for product/company presentations or promotion (for first 15 companies to register)

CONTACT INFO:
For booth reservation or more information on hotel, logistics & early bird benefits, please contact:
Ambrose Thomas (Ambrose.Thomas@trade.gov) 234-1-460 3749
Benedicta Nkwoh (Benedicta.Nkwoh@trade.gov) 234-1-4603520

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NORDIC COUNTRIES

Education Market Snapshot

Category	Denmark	Finland	Norway	Sweden
Total number of mobile students abroad ¹	5,117	10,033	18,806	17,281
Percent of population under 24 years of age ²	29.24%	27.65%	30.36%	28.6%
Total population ³	5,809,502	5,537,364	5,372,191	10,040,995

OVERVIEW

The United States remains one of the most popular study destinations for Nordic students and number one outside the EU. Nordic students view studying abroad as an opportunity to enhance employability and improve transferable skills and they are motivated to travel abroad in some phases of their study. Generally, the completion of a degree from a U.S. educational institute is a desirable qualification on employment applications. Across the Nordics, there are a number of local educational agents and organizations offering programs to young students wishing to go to the US.

The Nordic educational systems range from strong to world renowned, nearly all children are enrolled in public schools. All Nordic countries rate around or above the OECD average in nearly every category (PISA, 2015), and there are seven universities in the region among the world's top 100 (2018⁴). Pupils with strong academic abilities often select a secondary education where they can focus on languages, sciences, math or similar subjects to prepare them for university. However, Nordic graduates from secondary education often chose not to directly continue their studies at university or college, but rather tend to take 1 or 2 gap years first.

Higher education is also tax funded in Sweden, Norway, Denmark and Finland and thus essentially free of charge for eligible residents and financial support and benefits are available to those wishing to pursue a higher education.

¹ UNESCO Student Mobility number

² CIA World Factbook

³ CIA World Factbook, est per July 2018

⁴ Academic Ranking of World Universities, Shanghai Ranking

The structure of grants also transfers abroad (with local variations/limitations due to, for instance parents' incomes, degree level, commencement and terms of studies (part- or fulltime; maximum amounts, etc)), creating a potential for Nordic students to pursue their education elsewhere. Below are the country specific financial details:

Sweden ⁵	Norway ⁶	Denmark ⁷	Finland ⁸	
Maximum Grants and Loans including additional funding for studies abroad or higher tuition fees	~\$ 15,600 per Academic year (SEK 138,900)	~\$ 40,600 per Academic year (NOK 349,555)	~\$ 13,400 per Academic year (DKK 92,060) Plus an additional \$6,400 - 17,400 (DKK 44,100 - 119,700) if the entire program is abroad. For students that have maximized their financial aid, yet another additional loan of \$12,000 is available for the last 12 months of their last year studies	~\$ 15,400 per Academic year (EUR 14,220)

IRS average rate of exchange 2017⁹ for 1 USD = 8.894 SEK/8.606 NOK/6.864 DKK/0.923 EUR

SUB-SECTORS

In Sweden, the number of exchange students has remained relatively constant since 2011/12 with 1,100-1,200 students/year. Starting in 2018, Sweden has reinstated a military basic education for both men and women. While participation is mainly on a voluntary basis, this could potentially impact the number of applicants for studies abroad.

Every year more than 9,500 Finnish university exchange students spend a semester or a whole academic year abroad; 350-400 of them choose to study at a U.S. higher education institution.

Higher Education

Denmark¹⁰

Denmark had a total of 199,408 domestic students and 5,205 students studying abroad in the calendar year 2017

⁵ CSN

⁶ Lånekassen

⁷ State Educational Grant and Loan Scheme (SU)

⁸ Kela

⁹ IRS

Danish students in the U.S.			
Academic Level	2016/2017	2017/2018	% Change
Undergraduate	547	495	-9.50
Graduate	219	216	-1.40
Non-Degree	658	628	-4.60
OPT	66	84	27.30

Finland¹¹

Finland had a total of 262,368 domestic students and 19,174 students studying abroad in the calendar year 2017

Finnish students in the U.S.			
Academic Level	2016/2017	2017/2018	% Change
Undergraduate	403	395	-2.00
Graduate	138	132	-4.30
Non-Degree	140	174	24.30
OPT	56	67	19.60

Norway¹²

Norway had a total of 243,638 domestic students and 24,807 students studying abroad in the calendar year 2017

Norwegian student in the U.S.			
Academic Level	2016/2017	2017/2018	% Change
Undergraduate	1,399	1,269	-9.30
Graduate	302	296	-2.00
Non-Degree	387	380	-1.80
OPT	205	160	-22.00

Sweden¹³

Sweden had a total of 367,900 domestic students and 26,400 students studying abroad in the calendar year 2017.

Swedish student in the U.S.			
Academic Level	2016/2017	2017/2018	% Change
Undergraduate	2,571	2,170	-15.60
Graduate	381	329	-13.60
Non-Degree	669	636	-4.90
OPT	432	408	-5.60

Totals

Total of Swedish, Norwegian, Danish and Finnish students in the U.S.			
Academic Level	2016/2017	2017/2018	% Change
Undergraduate	4,920	4,329	-13.70
Graduate	1,040	973	-6.90
Non-Degree	1,854	1,818	-2.00
OPT	759	719	-5.60
TOTAL	8,573	7,839	-9.40

Undergraduate

Most Nordic students studying in the United States do so at the undergraduate level. With the exception of Finland, this is also the category that has declined the most in the recent year. While Associate Degree courses are popular, there is no Nordic equivalent to the U.S. Associate Degree, and upon returning to their home countries, not all U.S. credits are approved for further studies in the Nordics. Therefore, a non-trade/vocational Associate Degree is a less interesting option for a Nordic student unless they intend to continue to pursue higher education either in the U.S. or elsewhere.

Community College

Many U.S. Community Colleges are represented by numerous educational agents in the Nordics and likely those that draw the largest percentage of Nordic students due to comparatively low costs, among other reasons. According to a recent report¹⁴ by the Swedish Board of Student Finance (CSN), the most popular programs 2010-2012 were the General Program and Economics. This report also states that in 2017, 1,200 Swedish students studied at Community Colleges in the U.S., of which 70 percent were between 18-22 years of age.

¹⁰ Open Doors, Research & Insights and Open Doors, Places of Origin

¹¹ Open Doors, Research & Insights and Open Doors, Places of Origin

¹² Open Doors, Research & Insights and Open Doors, Places of Origin

¹³ Open Doors, Research & Insights and Open Doors, Places of Origin

¹⁴ "Studerande vid Community Colleges i USA"

Graduate Education

With the exception of **Finland**, the percentage decrease for graduate students is less than for undergraduate. About 86 percent of students in **Denmark** continue a master's degree within one year after completion of a bachelor's degree.

Secondary Education

Due to the difference in educational systems between the U.S. and Nordic countries, the demand for secondary education in the U.S. is limited. **Denmark** is an exception, as the interest for high-school exchange is quite high in Denmark.

Nor is financial aid available for high school studies abroad. Since U.S. high school credits generally are non-transferable to Nordic high schools, students need to redo the grade upon returning to the Nordics. **Norway** is the exception to this rule, as credits can be considered and approved, but need to be confirmed in advance with the student's Norwegian school. A high school year in the US can be integrated into a Norwegian diploma, but not into a Danish, Finnish or Swedish diploma.

Online Programs

Nordic students tend to take advantage of the free online education platform available for them through their university enrollment. In **Sweden** in 2015/16, 71,000 students were enrolled exclusively in online education. Online education is mostly dominated by individual courses and not entire programs. Online education has accounted for 12 – 15 % of all education between 2017/18 and 2016/17¹⁵.

Research and Development

Below follow some of the most well-known programs for research and development between the U.S. and the Nordic countries:

American Scandinavian Foundation, www.amscan.org
Thanks to Scandinavia Scholarship, www.thankstoscandinavia.org

Denmark

The Denmark-America Foundation, www.wemakeithappen.dk
Fulbright Center Denmark, www.fulbrightcenter.dk

Finland

Fulbright Finland, www.fulbright.fi
Björn Savén's Finnish American Scholarship, www.samsuomi.fi

Norway

Aker Scholarship, www.akersholanship.no
Noram Scholarships, www.noram.no

Sweden

Fulbright Sweden, www.fulbright.se
The Sweden America Foundation, www.sweamfo.se

¹⁵Swedish Council for Higher Education, "Distansutbildning i svensk högskola", 2017

Professional Training Services

Finland

Studies at the Finnish Universities of Applied Sciences are popular. Students usually graduate directly into a job related to their course of study. Studies are offered in Finnish, Swedish or English and many of the schools offer full education programs in English. Finland also scores high among OECD countries on measures of the development and use of highly skilled workers. At present, about 5,000 workers take training leave every year. The most popular professional training services include management training and courses for entrepreneurs, ICT, accounting, and marketing. The demand for professional training service programs abroad is currently small and not very common among **Finnish** workers and companies.

Sweden

In 2017, there were 50,300 students enrolled in higher vocational training coordinated by the Swedish National Agency for Higher Vocational Education. The objective of these programs is to meet the labor market's needs for qualified workforce. The programs combine theoretical and practical learning with strong ties to businesses, changing with time according to the needs of the labor market¹⁶.

OPPORTUNITIES

Nordic students are generally highly literate, proficient in English, have an open, international mind-set and are interested in travel and engaging with other cultures. The EU (incl Denmark, Finland and Sweden, but not Norway) goal is that, by 2020, 20 % of all students should have experience from exchange studies or internship abroad when they graduate¹⁷.

Many Nordic students are attracted by the characteristics of American university life. The life painted through media in the last century holds promise of collegial activities such as a playful environment with inspiring and high standard learning.

Language studies have been popular in the Nordics for a long time and with the nature of the globalized economy, it is increasingly important for Nordic students to gain international experience and strong language skills in English. However, many Nordic students have very high levels of English knowledge and will therefore not be as attracted to basic English classes. In the very fitness and sports oriented Nordic societies, college sports are an area for elite youths looking for scholarships in the U.S.

Exchange agreements where tuition can be severely reduced or eradicated is attractive for Nordic students that want to partake in the American college experience as well as improve their English language skills. Exchange agreements likely explain the reason for the increase in the number of Swedish exchange students, which according to a report from the Swedish Council for Higher Education¹⁸ has increase by 4% and the decline in free-movers by 3% in the latest academic year. Engineering, and Business and Management are the two most popular study fields for Finnish students in the United States. In Norway, the one-year LLM program in the U.S. is of interest to Norwegian law students wishing to gain expertise in a specialized field of law.

¹⁶Myndigheten för Yrkehögskolan

¹⁷Swedish Council for Higher Education (UHR), 2018

¹⁸UHR, "International mobility in higher education from a Swedish perspective"

EVENTS

College Days Scandinavia,
www.collegedaysfairs.org

Denmark

EDU days
Copenhagen, February 5-6, 2019
Aarhus - February 5-6, 2019
www.edu-days.dk/

Finland

Educa Helsinki
Trade fair for education and pedagogy
Helsinki, January 25-26, 2019,
<https://educa.messukeskus.com/?lang=en>

Studia Finland's largest youth study
and career event
Helsinki, November 28-29, 2019
<https://studia.messukeskus.com/?lang=en>

RESOURCES

Denmark

- Ministry of Foreign Affairs, www.um.dk/en/
- Ministry of Education, www.eng.uvm.dk
- Danish Agency for Institutions and Educational Grants, www.su.dk/english/
- Statistics Denmark, www.dst.dk/en
- Universities Denmark,
www.dkuni.dk/wp-content/uploads/2018/04/du_tal_om_danske_universiteter_2017.pdf
- The Denmark-America Foundation and Fulbright Commission, www.wemakeithappen.dk/
- Institute of International Education (2018), www.iie.org

Finland

- The Social Insurance Institution in Finland, KELA, www.kela.fi
- Ministry of Education and Culture, www.minedu.fi
- The Fulbright Center, www.fulbright.fi
- League of Finnish – American Societies (SAM), www.samsuomi.fi
- Organization for Economic Co-operation and Development (OECD), www.oecd.org
- The Center for International Mobility, www.cimo.fi
- National Board of Education, www.oph.fi
- Open Doors Report 2018, www.iie.org
- Education USA, www.educationusa.state.gov

Norway

- Norway America Association (NORAM), www.noram.no/en/
- Association of Norwegian Students Abroad (ANSA), www.ansa.no
- Aker Scholarship, www.akerscholarship.no/eng
- The Norwegian State Educational Loan Fund (Lånekassen), www.lanekassen.no/Languages/

Norway

Ta Utdanning 2019
Kristiansand 14 – 15 January
Stavanger 21 – 22 January
Bergen 24 – 25 January
Trondheim 31 January – 1 February
Tromsø 7 – 8 February
Oslo 13 – 14 February
www.tautdanning.no/uk/

Sweden

Saco Student Fair 2019
The largest event for post-secondary
education in Sweden
Dates TBD generally late November-early
December in Stockholm and Malmö
<https://www.saco.se/en/saco-student-fairs/>

- AmCham Norway, www.amcham.no/
- StudentTorget, www.studenttorget.no/
- NOKUT, <https://www.nokut.no/en/>
- SIU (Diku as of early 2019), www.siu.no/eng

Sweden

- American Chamber of Commerce, www.amcham.se
- Fulbright Commission, www.fulbright.se/
- Statistics Sweden, SCB, www.scb.se
- Study Now Studera.nu, www.studera.nu
- Swedish Board of Student Aid, www.csn.se/
- Swedish Council for Higher Education, www.uhr.se/sv/Information-in-English/
- Swedish Council for Higher Education, www.uhr.se/sv/Information-in-English/

EducationUSA, <https://educationusa.state.gov/>

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PERU

Capital: Lima
Population: 31,331,228 (July 2018 est.)
GDP: \$214.2 billion (2017 est.)
Currency: Nuevo Sol (PEN)
Language: Spanish (official), Quechua (official), Aymara (official)

UNESCO Student Mobility Number:
 Peru has 30,591 students studying abroad.

CIA World Factbook:
 Percent of population under 24 years old: 43.97%.

OVERVIEW

In recent years, the Ministry of Education - MINEDU - has undertaken a series of actions to improve the access to education and student performance. According to The Educational Quality Statistic organization (MINEDU), the number of enrollments at all levels of school increased by 2.3% from 2015 to 2016. Reading comprehension increased from 16% in 2007 to 50% in 2015 and mathematics proficiency went from 7% in 2007 to 27% in 2015.

Although the management of MINEDU has made considerable progress, there are still gaps to be closed. For example, despite having increased the education budget by 35% between 2006 and 2016 (3% to 4% of GDP), spending/investment is still low compared to the 5.5% average expenditure of the Organization for Economic Cooperation and Development - OECD. In Peru, the performance difference between urban and rural students is high. For example, for 2nd grade students 55.1% of urban children achieve satisfactory test scores but for rural students that figure drops to 18.5%. Also in mathematics 29.1% of urban students achieve a satisfactory score while in rural areas only 12.3% of students achieve satisfactory score.

There are three persistent deficiencies that plague the Peruvian educational system: high-costs, lack of proximity for students living outside of Lima, and poorly qualified teachers. However, some institutions like Pontific Catholic University (PUCP) are trying to solve the question of geographic access by building remote campuses in 10 of Peru's largest metropolitan areas outside of Lima. While Innova is another private education provider trying to close the cost gap by providing high-quality secondary education for Peru's rising middle class. Almost 80% of Peru's private schools are small and poorly founded, Innova constructs an average six buildings a year and has the goal to operate 100 schools by end of 2017.

In January 2015, a new higher education authority, the National Superintendence of University Higher Education - SUNEDU, replaced the National Assembly of Rectors (ANR) under a new higher education law. SUNEDU assumed a regulatory role over all universities, both public and private. Also, SUNEDU is responsible for authorizing the establishment of new universities. SUNEDU is expected to stop the establishment of low-quality universities by supervising quality of education standards.

Overall, the educational sector in Peru is heading in the right direction. Its structural defaults are many: high-costs, inadequate services, often poorly qualified teachers, lack of access outside the country's capital, and, last but not far from least, a vast proliferation of unregulated and poorly managed for-profit private universities.

Training

Growth of technical institutions in Peru is strong. Most of them are incorporating new and innovative programs and technical courses. There is a wide spread need from local companies for their young workers to have soft skills. This type of training is not prevalent in Peru currently. No matter the sector, three soft skills always come up: communication skills, problem solving and technological innovation.

Technical education has a fundamental role in the growth of the country by, developing qualified professionals that contribute economic growth. There is a fantastic opportunity for technical training institutions in Peru due to the high demand for qualified technicians.

SUB-SECTORS

Higher education

Developing a local network is essential to attract Peruvian students. In general Universities in Peru are open to sign agreements with other universities overseas. In 2016, Peru had 142 universities, 31 of which are public and the rest private. Of these, more than 50 are concentrated in Lima. It is important to point out that a proper due diligence is recommended before establishing partnership relations.

"Brain Drain" is a major consequence of the deficiencies within the Peruvian education sector. Many Peruvians with means take advantage of better educational opportunities and employment prospects abroad either in Europe or the US at the first opportunity. American Universities should focus in this niche of students and highlight opportunities for students to promote their professional careers.

Visiting Schools is an effective way to promote American Universities. Students in the upper and upper middle classes mostly decide to study abroad. The most popular country for Peruvians higher education students is Spain at 40% and, in second place is the United States at 13%.

Training

An opportunity exists within the robust private sector for innovative ventures. Training could be promoted within the private sector focusing on the development of employee capacities. Local consulting firms would be a good partner to promote US training entities.

Research and Development

There is an untapped need for innovative education providers that seek to cut the cost of higher education and, expand geographical reach within Peru, demand exist to innovate and incorporate new methodologies and technologies, and open-up to the rest of the works through coordinated research, work and exchange programs. The government is seeking to regulate the quality of the educational field and ensure excellence. Not surprisingly, there is a great deal of pressure not only to meet current international standards, but also to innovate. Thus, many of Peru's cutting-edge educational institutes are working to incorporate cutting edge technology and methods into their curriculum.

With over 1 million university students and an ever-growing middle class that is eager to invest in quality education, the market for low-cost, high-quality education in Peru has never been more relevant.

Another opportunity lies in reconstruction caused by natural disaster. Peru's rainy season falls broadly in the first quarter of every year. In 2017, Peru experienced ten times the usual

rainfall, destroying or irreparably damaging much of Peru's educational infrastructure. For this reason, MINEDU has projected the need to invest USD 300 Million to rebuild destroyed schools, especially in the northern region of Peru where the effects of flooding were the most severe.

Professional Training Services

An opportunity exists within the robust private sector for innovative ventures. Training could be promoted within the private sector focusing on the development of employee capacities. Local consulting firms would be a good partner to promote US training entities. Soft skills and English language training are high demand. Training for technicians in the automotive sector is also in high demand. The Peruvian Automotive Association is looking for partners to implement their new technical institute in the automotive sector.

RESOURCES

EducationUSA, <https://educationusa.state.gov/>

Peruvian Ministry of Education:
Calle Del Comercio 193, San Borja - Lima, Perú
(511) 615-5800
webmaster@minedu.gob.pe
Website : www.minedu.gob.pe

Regional Education Center of Lima
Website: www.dreilm.gob.pe

Institute of International Education
Website: www.iie.org/opendoors

Sociedad de Comercio Exterior del Perú (COMEXPERU)
Bartolomé Herrera 254, Miraflores
Lima-18, Peru
Tel (511) 625-7700
E-mail: comexperu@comexperu.org.pe
Website: <http://www.comexperu.org.pe>

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<http://www.export.gov/peru>



PORTUGAL

Capital:	Lisbon
Population:	10,355,493 (July 2018 est.)
GDP (USD):	\$218 billion (2017 est.)
Language:	Euro
Language:	Portuguese (official)

UNESCO Student Mobility Number:

Portugal has 12,713 students studying abroad.

CIA World Factbook:

24.9% of the Portuguese population is under 24 years old.

OVERVIEW

The education system in Portugal suffered significant changes since it became regulated back in 1986. The last major reform was the redefining of the degree system according to the Bologna Process, where Portugal is one of the signatory nations. The Portuguese higher education system is currently a three-cycle system with a network of more than 40 public and 92 private higher education institutions.

According to the 2018 Open Doors Report on International Educational Exchange, there were 937 students from Portugal studying in the United States, an increase of 0.9% percent compared with the previous year. This represents a 6% percent increase since 2014, which is remarkable and namely due to Portugal's economic recovery since it successfully exited its three-year bailout program in June 2014. This year's increase in student mobility to the U.S. is also significant because the proportion of the Portuguese population between the ages of 15-24 has been declining over the past ten years.

In 2017/18, students from Portugal in the United States primarily enrolled at the undergraduate level with 48.5 percent, followed by the graduate level with 29.2 percent. Students pursuing optional practical training account for 10.7 percent and the remainder 10.6 enrolled in non-degree programs such as English language or short-term studies. An important note is the 38.9 percent increase of Portuguese students pursuing non-degree programs and a 12.1 percent decrease of those seeking optional practical training compared with the previous year. The report also found the number of U.S. students studying abroad increased 148 percent increase since 2012. The number of U.S. students in Portugal increased from 523 to 693 in 2016-17, representing a 32.5 percent jump from the previous year.

Portuguese students are actively seeking study abroad opportunities, and many take full advantage of the European Union's Erasmus program for exchanges within Europe. Portuguese students highly value educational opportunities in non-EU countries, namely the United States. Portugal is presently an important recruiting destination because the country attracts international students from all over the world.

MARKET ENTRY

To effectively enter the Portuguese market, it is highly recommended that U.S. schools consider the following strategies:

1. Seek partnerships or agreements with public or private universities to facilitate joint programs and exchange programs for students and faculty;
2. Participate in local recruitment fairs, trade missions, and outreach events, as well as meet face to face school counselors and other stakeholders.

It is also recommendable that U.S. schools provide clear and in-depth information about programs and the application processes, as well as describe opportunities of scholarships and financial aid.

CURRENT DEMAND

Portuguese students are primarily attracted to these types of U.S. programs:

- U.S. universities and community colleges
- Undergraduate, Graduate and Master Programs
- Summer camps
- OPT

EVENTS

- Futurália, April 3-7, 2019 (Lisbon), <http://futuralia.fil.pt/>
- Study Abroad Portugal, Spring 2019 in Lisbon and Porto, <http://www.studyabroadportugal.pt/>

RESOURCES

- EducationUSA, <https://educationusa.state.gov/>
- Fulbright Commission Portugal, <http://www.fulbright.pt/>
- Portuguese National Council of Education, <http://www.cnedu.pt>
- Council of Rectors of Portuguese Universities, <http://www.crup.pt/>
- Portuguese Polytechnic Institutes Coordinating Council, <http://www.ccisp.pt>
- Portuguese Association of Private Higher Education, <http://www.apesp.pt/>
- Portuguese Foundation of Science and Technology, <http://www.fct.pt/apoios/>

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SINGAPORE

Capital:	Singapore
Population:	5,995,991 (July 2018 est.)
GDP:	\$323.9 billion (2017 est.)
Currency:	Singapore Dollar (SGD)
Language:	Mandarin (official), English (official), Malay (official), Tamil (official)

UNESCO Student Mobility Number:

Total number of mobile students abroad: 24,793.

CIA World Factbook:

28.82% of the population is under the age of 24 years.

OVERVIEW

Singapore is recognized as a global education leader and ranked as one of the finest in the world for its quality and consistency in producing students who are rated among the best in literacy, reading, mathematics and science. As such, Singapore, with a population of 5.6 million, has been the choice destination for more than 70,000 foreign students from around the world. Singapore's education system is in sync with the job market and stays current to ensure relevance to the local economy.

To further sustain growth and maintain a reputation for top quality education, Singapore has attracted various leading international institutions. Partnerships such as research collaboration, joint degree or exchange programs are popular among local universities and colleges. However, due to the competitive nature of higher education in Singapore, close to 25,000 students travel overseas to further their studies.

The U.S. is a popular destination for these students due to the strong liberal arts education track; however, the strengthening of the U.S. dollar and a perceived less welcoming environment in the U.S. is causing student numbers to decline compared to other countries such as Australia, Britain, Canada and New Zealand. Despite this, U.S. higher education providers can expect favorable recruitment figures from Singapore for institutions that are internationally well-ranked and / or strategically marketed.

SUB-SECTORS

Based on International Student Data from the 2018 Open Doors Report, Singapore has 4,575 students studying in the U.S. which is slightly less than a fifth of the total Singaporeans studying overseas. This number has decreased by 2.2% compared to the previous year which also corresponds to the lower numbers of student visa being issued to Singaporeans. See figures below at each September for the 10-year period ending 2017:

- 2008: 2499 (7.6% increase)
- 2009: 2588 (3.6% increase)
- 2010: 2814 (8.7% increase)
- 2011: 2875 (2.2% increase)
- 2012: 3109 (8.1% increase)
- 2013: 3253 (4.6% increase)

- 2014: 3038 (6.6% decrease)
- 2015: 3117 (2.6% increase)
- 2016: 2846 (-8.7% decrease)
- 2017: 2580 (-9.3% decrease)

Out of the 4,575 students, about half are pursuing undergraduate courses, nearly a third are pursuing graduate courses while the remainder are mainly undergoing practical training. There is practically no demand for secondary or high school education while online programs are mainly taken up by adult students who do distance learning or skills upgrading. Several degree programs have become increasingly important and are expected to see increased demand from Singaporean and third-country students studying in Singapore. These degree programs include:

- Cybersecurity
- Media and animation
- Hospitality and tourism
- Sports science and medicine
- Business Analytics and Digital Economy

Singapore's education market emphasizes, supports and values higher education and skills upgrading. Many government agencies and private sector companies offer full scholarships for top students to pursue their undergraduate and graduate studies in foreign universities, including in the United States. Furthermore, an increasing number of adult employees are also encouraged to upgrade their skills and be more knowledgeable in a globalized economy. In line with the long-term commitment to continuing education and training, the government will top-up the Lifelong Learning Endowment Fund by USD 357 million, bringing the total fund size to USD 3.3 billion. A credit of S\$500 (around US\$370) per Singapore citizen with a periodic top up is also given by the Singapore Government for Skills Future development and training.

For Boarding Schools, there is limited interest from Singaporeans since parents are not as keen to have their children leave home for an extended period at such a young age. Moreover, Singapore male citizens must do compulsory National Service and if they are out of the country from 13-14 years old onwards, they must apply for exit permit which comes with a financial bond. U.S. boarding schools can instead tap the expat students studying in Singapore and some of them have expressed interest in attending boarding schools.

Professional Training Services are getting to be popular especially with multi-national corporations (MNCs) and larger companies in Singapore though competition is very great. Courses such as leadership, project management, six sigma quality, digital transformation and continuous improvement are the more common ones being offered by various local and even foreign companies who have a presence in Singapore. SMEs who want to have their staff undergo such courses which lead to professional development units usually apply for government grants to cover the costs. However, mentoring courses are not so widely subscribed due to the Asian culture which is a more of a top-down command and control approach.

OPPORTUNITIES

Singapore's education system is well known for its quality which is why there is a strong demand from students in the region to study here. The estimated number of foreign students in Singapore is around 50,000 (mainly from Malaysia, Indonesia, Thailand, Vietnam, China, India and South Korea) who are between the ages of 13-23 years old. Hence, besides Singaporeans,

U.S. universities and colleges should also take into consideration the large number of foreign students in Singapore. In addition to recruiting full-time students (both local and overseas) to study in the United States, U.S. universities may want to consider offering their external degree and executive education programs in Singapore to international executives working in the Indo-Pacific region.

U.S. universities and colleges interested in offering courses in Singapore have various market entry options. These include, setting up a physical campus, partnering with local universities, polytechnics and private education institutions or partnering with an institution to offer on-line courses. Having a local presence is beneficial in terms of creating visibility and being able to answer questions from prospective students face-to-face. Many local universities and colleges welcome the various forms of partnerships, including R&D, exchange programs and the promotion of dual degrees. Alternatively, U.S. Universities and colleges can recruit students to study in the U.S. Generally, Singaporean students find programs that allow them to complete at least part of their course work in Singapore a very attractive and financially viable alternative to completing their studies entirely in the United States.

U.S. universities and colleges will find a receptive market in Singapore, provided they are willing to invest in long-term branding and marketing with accredited programs in disciplines that offer strong career growth and high-income potential. Additionally, Singapore is also a gateway to the ASEAN region which makes it an ideal location for U.S. universities to enjoy the amplifying effect and reach to the ASEAN market.

EVENTS

EducationUSA Fair in March 2019, <https://educationusa.state.gov/events/educationusa-southeast-asia-fair-tour-2019-singapore-event>

AEO Education Fair in September 2019, <https://www.aetour.com/about.html>

VJB American Boarding School Fair in November 2019, https://docs.google.com/forms/d/e/1FAIpQLSft7F5Pd0x0JnVa5IoKh6Ua1U4SvjQXmBTL5yZWG8Lssi_w/viewform; <http://www.virginiabush.com/resources/>

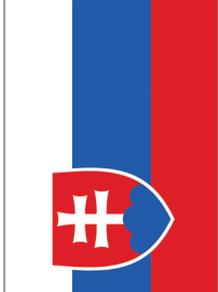
RESOURCES

- Council for Private Education, <http://www.cpe.gov.sg>
- Ministry of Education, <http://www.moe.gov.sg>
- EducationUSA, <https://educationusa.state.gov/centers/educationusa-singapore-advising-center>

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SLOVAKIA

Capital: Bratislava
Population: 5,445,040 (July 2018 est.)
GDP: \$95.96 billion (2017 est.)
Currency: Euro
Language: Slovak (official)

UNESCO Student Mobility Number:

Slovakia has 32,010 students studying abroad.

CIA World Factbook:

25.68% of the population is under 24 years old.

OVERVIEW

The Slovak education system consists of three stages: primary education, secondary education and tertiary education. Besides church and privately owned, majority of schools are State owned. The secondary education lasts in general four years and in some cases may last five to eight years. According to the Slovak Law, ten-year education is compulsory.

Based on the number of pupils, secondary school students (grammar schools 74,000 students, vocational 135,000 students) have the highest interest in studying at trade academies, hotel academies, and schools of electrical engineering.

2017/2018

School	Students	Teachers
Primary	468,000	35,000
Secondary	212,009	21,000
Tertiary	136,684	9,601*

**Only public universities data*

The university environment is not homogeneous from small colleges with dozens of students to universities with ten thousand students. In 2017 university education was provided by twenty-two university colleges, eleven colleges (not integrated into university colleges or higher education institutions) and two vocational colleges. Higher education was also offered by five foreign universities - University of International and Public Relations in Prague, Hochschule Fresenius GmbH, INSTITUT SUPERRIEUR SPÉCIALISÉ DE LA MODE - MOD'SPÉ Paris, Staropolska Szkoła Wyższa w Kielcach and Szent István Egyetem.

University degree was obtainable in 373 study fields and study departments were divided into nine groups: education and training (10 departments), humanities and arts (45), social, economic and legal sciences (57), natural sciences (62), design, technology, production and communication, agricultural and veterinary sciences (39), health (48), services (22) and information science, mathematics and information and communication technologies (22).

136,684 university students in 2017 represent a year on year drop of 7.45% (10,996 students out of who 8,884 were students from public higher education institutions and 2,112 students from private universities). The decreasing tendency of the number of university students is also reflected in the significant reduction of the number of newly enrolled students in private higher education institutions. 2,327 newly enrolled students in private colleges in 2017 recorded a 13.53% decline compared to year 2016. For public higher education institutions in 2017, 23,844 first graders represent a 10% decrease compared to 2016.

Statistically 55.17% students, including the doctorate, majored in social sciences, science and services.

The number of doctorate students in both public and private universities decreased by 398 students (5.57%) on year-on-year basis. Daily form of study experienced a year-on-year decrease of 202 post-graduate students (4.97%). External form of study noted a drop of 196 students (6.35%). At public higher education institutes the number of students studying in a doctorate study was lower by 362 compared to the previous year (5.36% year-on-year decrease), while at private universities the number decreased by 36. Out of all students, doctorate students represent 4.96% share.

In 2017, female students represented 58.94% (a year-on-year decrease of 0.27 percentage points).

SUB-SECTORS

Online Programs

Online programs are not very common at Slovak schools. The only exception is University of Central Europe and City University Seattle where students study via e-mail and Moodle discussion forum. Slovak students may extend their qualification via e-learning at Business Institute, the largest private MBA institution in the Czech Republic and Slovakia or gain MBA, bachelor and engineer degrees at foreign universities.

Research and Development

Slovakia ranks among the countries with the lowest level of research and development resources in the university sector in the EU. In 2017 universities received R&D state budget funding almost exclusively through the Slovak Ministry of Education. The university sector had total R&D resources of 185 million EUR (0.22% of GDP). Slovak students in search of R&D scholarships or grants may use the National portal EURAXESS, European portal EURAESS, CORDIS (including Horizon 2020), Fulbright Commission or Central Information Portal for R&D and Innovation under the auspices of Slovak Ministry of Education resources.

Professional Training Services

High school exchanges to the United States can be facilitated through a non-profit or commercial organization, e.g. Slovak Academic Information Agency or can be self-organized. The majority of university students are interested in economic and humanities subjects whereas technical areas rank third in popularity. Slovak students interested in studying in the U.S. need to apply for the correct student visa. European countries appear to be a more attractive destination for studies due to school fees, EU scholarship eligibility and vicinity. University studies in the U.S. are more achievable to academically talented students and student eligible for athletic scholarships.

English is no longer considered an advantage in the labor market. Most foreign employers expect a minimum of English knowledge and offer to pay for corporate courses in English or other languages.

OPPORTUNITIES

University Mobility

Foreign schools are regarded as highly prestigious and attractive. All public higher education institutions took part in The Individual Erasmus Mobility Initiative 2016 call which resulted in 2,399 students studying mostly in Czech Republic, Spain and Germany (4.93 months stay on average) and 1,337 interns mostly in Czech Republic, Spain and Germany (average internship length of 3.33 months).

11.9% Slovak students leave to study abroad where they graduate (versus EU average of 3.1%). Only 0.1% return to graduate in Slovakia (versus EU average of 7.6%). Top 5 countries where Slovaks study are: Czech Republic, Hungary, UK, Austria and Germany.

Since English language is mandatory by law from grade three onward Slovak students qualify for both undergraduate and graduate studies in the U.S. U.S. university degrees offered locally or within Europe show to be more accessible. The number of Slovak students in the U.S. has been relatively stable at 340+ in the last years.

School Year	Students	% of Change
2017/2018	347	-.3%
2016/2017	348	1.5%
2015/2016	343	-4.5%

Entering the Market

U.S. universities may be established in Slovakia based on Law 596/2003 Coll. on State Administration in Education and School Self-Governing Bodies once their request is approved by the Slovak Ministry of Education.

U.S. universities may enter the Slovak education market via a partnership with local schools through student exchange programs. One-year study exchange programs are highly attractive. (Note: As more and more companies require their employees to speak English, there are numerous organizations offering exchange programs to learn English in native country.)

U.S. universities may also make use of Erasmus+ is the European Union (EU) program for education, training, youth and sport for the period 2014-2020. Erasmus+ supports activities that are closely matched with the EU's priorities for cooperation policy with partner countries throughout the world including Canada and the United States and regions. Three years into the program proved popular with North American countries.

Fulbright Commission – (in years 1992-2018: 365 U.S. Grantees, 330 Slovak Grantees) Program portfolio for Slovak Citizens includes Fulbright Scholar Program, Fulbright Student Program, Fulbright-Schuman Program, Hubert H. Humphrey Fellowship, The U. S. Institutes on American Studies and Weiser Professional Development Award.

Slovak Education reform - searching for innovative projects and approaches to improve education at Slovak schools under the Generation 3.0 initiative - non-governmental organization Pontis Foundation in cooperation with the US Embassy in Slovakia will invite US experts to share their experiences and know-how with measuring the impacts of the initiatives on the education system.

Cooperation with Slovak businesses through establishing their schools, run apprenticeship programs or organize internship programs to attract potential employees.

Market Challenges

- Slovak Ministry's unsatisfactory budget of 1.35billion EUR with tendency to grow to 1.54 billion EUR (from current 3.9% to 4.1%* GDP in 2021 whereas EU's current budget is 4.7% - 5%GDP).
- Ongoing education reform based on Finland
- Neglected science & research and modernization of schools
- Salaries (to grow by 200 million EUR)

SECONDARY EDUCATION

- More school capacities than actual number of students
- Less than 50% are interested to study
- Regional governments will open only classes based on their regional
- Labor market needs (63% of graduates don't work in their major)
- Inclusion (13 million EUR deficient) and integration
- Demotivated teaching staff, lack of teachers/elderly teaching staff (av. 46 years)
- Missing textbooks for certain grades
- Dual education (lacking 1.5 million EUR funding, complicated administrative processing)

Tertiary education

- Less applicants, enrollments and graduates (According to Center for World University Rankings 2018 -2019 out of 1,000 universities The Comenius University in Bratislava placed No.673 as the only Slovak university.)
- Accreditation Committee – missing 0.4 million EUR in funding, unclear university evaluating criteria
- 57% of graduates don't work in their major (There is a growing mismatch between university graduates and the needs of the labor market, with Eurostat showing youth unemployment as high as 22%. 35% of university graduates work at high school degree positions.)
- Low salaries cause disinterest in teaching profession or teachers leaving for business field (The average salary of a public college teacher in 2017 was 1,513.60 EUR, of a public higher education institution professor 2,228.67 EUR and associate professor 1,700.28 EUR. (Note: Starting January 1, 2019 the minimum wage set by law is 520 EUR.)

EVENTS

Study and Career Fair - 2019 dates are not yet publicly disclosed. Other smaller fairs focus on individual markets, e.g. Veletrh Gaudeamus presenting Czech universities or Scandinavian Study introducing universities from UK, Netherlands, Denmark, Finland and Canada.

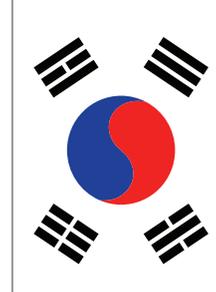
RESOURCES

- EducationUSA, <https://educationusa.state.gov/>
- Slovak Ministry of Education, <https://www.minedu.sk/vyrocnne-spravy-o-stave-vysokeho-skolstva/>
- J.W. Fulbright Commission Bratislava www.fulbright.sk/
- Institute of International Education, <https://www.iie.org/Research-and-Insights/Open-Doors/Data/International-Students/Places-of-Origin>

- Slovak Academic Information Agency, <https://granty.saia.sk/Pages/ProgramZoznam.aspx>
- Erasmus+, <http://www.erasmusplus.sk/>
- Center for World University Rankings, <https://cwur.org/2018-19.php>

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SOUTH KOREA

Capital: Seoul
Population: 51,418,097 (July 2018 est.)
GDP: \$1.54 trillion (2017 est.)
Currency: South Korean Won (KRW)
Language: Korean, English

UNESCO Student Mobility Number:
 Korea has 105,360 students studying abroad.

CIA World Factbook:
 25.22% of the population is under 24 years old.

OVERVIEW

South Korea represents the highest per capita source of international students in the U.S. and the third-largest source country in absolute numbers behind China and India. While the U.S. remains by far one of the most preferred overseas destinations for Korean students, Korea's declining demographics and increased options to learn English while staying home mean fewer Korean students are studying in the United States. Education is a very important ingredient of the Korean economy and the Korean psyche. Overseas education has become a standard in South Korea and parents of the upper middle class are willing to spend a sizable portion of their income on their children's overseas education, expecting high future returns. While this market is attractive to a wide-swath of the U.S. educational industry, it has become, over the last few years, an increasingly tough market. Good opportunities do exist, albeit with smaller numbers of U.S.-bound Korean students, when U.S. educational entities are prepared to meet a highly sophisticated, demanding, and brand-oriented market.

SUB-SECTORS

In the 2017/2018 academic year, 54,555 students from South Korea were studying in the United States (down 7% from the previous year). Over the last few years, the number of Korean students studying in the U.S. has steadily declined. Korea is a rapidly aging society with one of the world's lowest birth rates of 1.1 children per family. In addition to this demographic decline, the recent economic difficulties at home are also affecting, to some degree, the declining number of Korean students in the U.S.

Higher Education

The fields of study of Korean students in the U.S. have now become more diversified. Currently 20 percent of Korean students are seeking STEM majors, while 17 percent are studying business management. South Korea is one of the countries with the largest percentage of students studying fine and applied arts. 12 percent of Korean students are currently enrolled in fine and applied arts programs.

The undergraduates far outnumber the other major student categories, such as grade schoolers, graduate and doctoral students. Over half the South Korean students in the U.S. are pursuing an undergraduate degree. U.S. universities with the largest number of Korean undergraduates are large state universities.

Graduate student applicants in Korea include master's and Ph.D. students in a variety of disciplines, ranging from the arts to business to scientific subjects. 27 percent of South Korean students studying in the United States are enrolled in graduate students. Some experts have hypothesized that many South Korean graduate students return to South Korea for graduate work due to the sophisticated nature of many graduate programs – especially in the STEM fields.

SECONDARY EDUCATION

Korean parents are willing to send young children to private schools in the U.S. for several years. Grade schoolers typically study in the U.S. to learn English at an early age. Others apply because they do not thrive in the high-pressure, competitive Korean school system that emphasizes rote learning and long hours in cram schools. The expected outcomes from overseas study in secondary school are to enter prestigious higher educational institutions in the U.S. The total number of secondary students has continuously decreased from its 2008 peak because there are simply fewer school-age children.

Online Programs

Language barrier is the most significant obstacle for U.S. online programs to recruit prospective students. To reach the required proficiency level of English language for Korean students to effectively complete online course works in English, Korean students should at least have lived or been educated in the U.S. or other English-speaking countries. Koreans also prefer to have living and cultural experiences in the U.S. while earning degrees or certificates from U.S. institutions. The current demand for online programs in English is very limited.

Professional Training Services

Compared to Korean parents' impressively high investment on private education for their children, Korean corporations' spending on professional training for employees remain at the very minimal level. Internationally well-known U.S. players have built a powerful reputation in Korea over 30 years. A proven track record with some name-brand companies (Fortune 500) is part of the key to success in this market. Specialized business training programs that are focused on narrowly defined skills and knowledge are well received in the market.

OPPORTUNITIES

Although the appeal of a U.S. degree has diminished, and it does not confer the same advantages in the job market as it did a decade ago, the perception of U.S. universities being at the cutting edge of academic research and prestige remains a strong draw for Koreans. English language skills, internship experience, or a degree from a mid-ranked state school in the United States is seen as providing a competitive advantage to finding a full-time job in Korea.

Korean firms are now weighing their options among the plethora of training programs and look closely at pricing and the extensiveness of localization of the programs. Technically focused programs offering a license or certificate have growth potential.

EVENTS

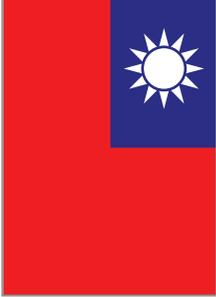
Korea Study Abroad & Emigration Fair 2019 Spring, <http://www.uhak2min.com/>
MBA Tours, www.thembatour.com
AIEF Seoul and Busan Fair, <https://www.aief-usa.org/educational-fair-info>

RESOURCES

- Education USA, http://seoul.usembassy.gov/ack_edu.html
- Fulbright (Korea-American Educational Commission), <http://fulbright.or.kr/xs/index>
- Korea Overseas Studying Association (KOSA), <http://www.kosaworld.org/>

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TAIWAN

Capital: Taipei
Population: 23,545,963 (July 2018 est.)
GDP: \$572.6 billion (2017 est.)
Currency: New Taiwan Dollar (TWD)
Language: Mandarin Chinese (official)

CIA World Factbook:

25.2% of the population is under 24 years old.

OVERVIEW

According to IIE Open Doors, in the 2017/18 academic year, 22,454 students from Taiwan studied in the United States, an increase of 4.4% over the previous year, contributing USD 824 million to the U.S. economy. For four consecutive years, Taiwan is the seventh leading source of origin for students coming to the United States, the fourth per capita (only behind Saudi Arabia, South Korea and Hong Kong). The majority of Taiwan students in the U.S. study at the graduate level. In 2017/18, their breakdown was as follows: 31.2% undergraduate; 41.1% graduate students; 7.7% non-degree and 20 % OPT (Optional Practical Training). The most popular fields of study for Taiwan students are: Business/Management (19.2%), STEM (18.1%), Fine/Applied Arts (11.0%), and Social Science (6.2%).

Taiwan's education reform in the early 2000s to upgrade vocational and technical colleges to become universities has resulted in an oversupply of universities, a devaluation of college degrees and a mismatch of labor supply and job market demand. The issue of overcapacity is further complicated by Taiwan's persistently low birthrate. It is estimated that by 2023, the number of college entrants will be 184,000, compared with 271,108 in 2013. This 32% decline is a major concern as it could lead to a shortage of labor in the future workforce and the forced closure of many higher education institutions. In response to the looming social and education crisis, Taiwan's Ministry of Education formed a Higher Education Innovation and Transformation Task Force in January 2016 to take a more aggressive position in overseeing the forming of alliances among higher education institutions. The task force is also in charge of fostering collaboration between domestic and foreign universities that will encourage the establishment of experimental branch campuses, independent colleges, or certificate programs and courses. Additionally, in response to globalization and talent mobility, the Taiwan authorities have put forward two important initiatives this year. The first one is to make English as the second official language of Taiwan in the near future. In the next couple of years, a number of central government agencies will carry out relevant policy evaluation and planning work, with the goal of strengthening children's English ability from primary and middle school level. The second project is the "Yushan Project" which is to attract and retain the top talents domestically and from abroad. The project will include three major programs, "Yushan Scholars", " Higher Education Deep-Planning Program Flexible Salary", and "Raise 10% Salary for Professor for Academic Research". The flexible salary is used as a reward for teaching and researching personnel in colleges and universities. Each year, the maximum budget of USD 187 million expects to benefit 19,000 teachers.

According to the Taiwan MOE's statistics published in 2017, a total of 63,270 Taiwan students went abroad to study or work in 2016. The United states remains the top study destination for Taiwan students, with 21,127 students, taking up 34 percent of the overall study abroad

market share. Australia comes in second place, with 16,573 students, and Japan third place, with 9,642 Taiwan students in 2016. Other countries that are popular among Taiwan students are Canada, U.K., Germany, France and New Zealand. Most Taiwan students choose to go to the U.S. for educational purpose, to attend degree, certificate or language programs. In contrast, most students that go to Australia for working holiday programs, Canada and Japan offers similar visas to allow Taiwan citizens to work and study in short-term programs.

Taiwan Students Abroad Destination In 2016	
America (mainly U.S.)	24,349
Oceania (mainly Australia)	18,393
Asia (mainly Japan)	10,816
Europe (mainly U.K.)	9,712
TOTAL	63,270

(Source: Taiwan Ministry of Education)

Traditionally, the major foreign recruiters are from English-speaking countries, however, in recent years, neighboring Asian countries such as Hong Kong, China and Singapore have stepped up recruiting efforts for Taiwan students, especially high school students. It is estimated that during the past five years, the number of Taiwan high school students going abroad to study has grown 72%, from 858 students in 2012 to 1,478 in 2016. Besides aggressive recruitment efforts by foreign schools, some of the other contributing factors to the growth include parents' dissatisfaction with the local college application system, job opportunities and associated low pay for youth in Taiwan. Despite the many incentives the Chinese or other Asian governments are offering, the U.S. remains the top choice for Taiwan parents. This can be seen by the increase in the number of bilingual international schools that prepare Taiwan students to study in U.S. and foreign universities. Since many of these students will remain in the U.S. for graduate level studies, the economic contribution of Taiwan students will last longer and their affiliation with the U.S. will be even stronger. These indicators continue to show positive points in the direction of growth in the high school and undergraduate market segments

Taiwan is a stable and mature market for U.S. institutions. Domestic supply of higher education institutions has also reached a saturation point. Employability is one of the main factors students take into consideration when choosing a school, so career development or internship programs are becoming increasingly popular. Therefore, it is advisable for U.S. schools to emphasize affordability and post-graduation job placement to attract Taiwan students. U.S. schools should pursue deeper partnerships with Taiwan institutions for student and scholarly exchanges or joint degree programs to maintain their leading position. Engaging with student recruitment agencies, developing active alumni networks, and reaching out to potential students through fairs and social media are all recommended strategies.

Education Technology

There is a growing interest for innovative approaches in learning in Taiwan's education sector. Taiwan's e-Learning market is estimated at US\$ 3.5 billion in 2016, a 21% growth from 2015. Educators are increasingly embracing education IT as they see it as a good way to extend educational resources to a broader audience, and to design more personalized learning curriculum. Some of the hot topics in Taiwan's education IT sector include STEM, STEAM and STREAM education, robotics, device management solutions, subject-oriented assessment

solution, learning management system, vocational training solutions and simulation learning for medical training. Mobile learning and game-based learning technologies, software and content are expected to be in growing demand in the Taiwan market.

MARKET ENTRY

Partnership with local schools is a long-term strategy for U.S. schools when recruiting Taiwan students for joint-degree programs or short-term summer programs. In addition, many Taiwan universities have established Mandarin centers to educate foreign students. U.S. schools should consider increasing cultural and language exchanges with Taiwan schools. CS Taiwan can help U.S. schools connect with local universities or high schools for collaboration.

Partnership with student recruiting agents allows U.S. schools to have year-round exposure to the Taiwan market. Recruiting agents are one of the main resources used by Taiwan students and parents when planning to study abroad. CS Taiwan can help U.S. schools pre-screen prospective agents and arrange one-on-one meetings in Taipei, Taichung and Kaohsiung.

Participation in education fairs may also be a very effective tool. Fair organizers have a deep knowledge of the market and can greatly reduce U.S. schools' marketing expenses. Local fair organizers also counsel students throughout the year and are able to follow up with the students who visited the fair. Taiwan's major education fairs featuring U.S. schools include:

- OH! Study International Education Expo (Spring/Fall)
- USEAS Study World
- Linden Education Fairs
- The Association of Boarding Schools Fair (TABS)
- The MBA Tour

CURRENT DEMAND

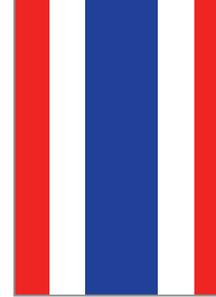
- Programs in business, engineering, computer sciences, health care, education and fine arts.
- Programs containing work or internship component
- Pathway or bridge programs
- Joint degree programs with local universities
- High schools and Boarding Schools

RESOURCES

- Taiwan Ministry of Education, <https://english.moe.gov.tw/mp-1.html>
- The Foundation for International Cooperation in Higher Education of Taiwan (FICHET), www.fichet.org.tw
- EducationUSA, <https://educationusa.state.gov/>

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THAILAND

Capital:	Bangkok
Population:	68,615,858 (July 2018 est.)
GDP:	\$455.4 billion (2017 est.)
Currency:	Baht (THB)
Language:	Thai (official)

UNESCO Student Mobility Number:

Thailand has 29,884 students studying abroad.

CIA World Factbook:

30.5% of the population is under 24 years old

OVERVIEW

Thai government is still aiming to improve its education system and to boost highly educated worker technological skills to serve target industry sectors. The target sectors are the "First S-curve" sectors including next-generation automotive; smart electronics; affluent medical and wellness tourism; agriculture and biotechnology; and future-oriented foods, as well as the "New S-curve" sectors including robotics; aviation and logistics; biofuels and biochemicals; digital industries; and a medical hub. These development strategies are in line with the government's policy to upgrade Thailand from a middle income to a highly developed country by 2036.

In terms of education spending, Thailand spent 4 percent of GDP, which is 20 percent of the government budget, to improve the educational system. Despite relatively high government spending on education, the outcome is not as expected. According to the 2015 "Programme for International Student Assessment" (PISA) result, Thailand was ranked 57th out of the total of 72 countries, with scores dropping in all subjects since the 2012 assessment. PISA also found that Thai students spend 23.5 hours per week studying after school. Thailand's educational system has much room for improvement, including reducing the gap between students in elite schools and those in under-privileged schools, developing students and instructors' proficiency in the English language, upskilling teachers, and developing the quality of educational textbooks.

Another challenge for Thai education is a decline due to demographic trends, which shows Thailand's population to be aging rapidly. The National Economic and Social Development Board also expects the number of Thais in the school-age group (0-21 years) will fall to 20% of the population in 2040. During the past year's admissions, universities had vacancies for up to 150,000 prospective students to study various subjects, but only 80,000 applied for the entrance test. Three quarters of Thai universities are facing of a shortage in numbers of student enrollment, and they are at risk of downsizing or closing over the next decade.

Hence, both state and private universities offer international programs to attract Thais and foreign students. In 2017, there were more than 2,200 international programs available for undergraduate studies. Moreover, there are currently more than 31,500 foreign undergraduate students studying in Thailand, the majority of whom are from China (approximately 16 percent), followed by Myanmar, Cambodia, and Lao PDR, according to the UNESCO Institute of Statistics.

The number of international high schools is increasing every year. Currently, there are 182 international high schools with 4-5 percent growth rate annually. Due to the growing demand for high quality education and parent's desire in empowering students to be ready for the global market, Thai parents are choosing to offer their children study in international high schools with broader international background. It is widely accepted in Thailand that opportunities for students after international school provides for unlimited opportunities for students to enter the top universities and have better careers.

SUB-SECTORS:

The demand to study abroad for an undergraduate degree has grown over time. More than half of the Thai students in the U.S. education system are enrolled in higher education programs. According to the 2017/2018 Open Doors report, prepared by Institute of International Education (IIE) in 2018, the total number of Thai students declined by 3.7% to 6,636 students compared to 6,893 students in the previous year. Thai students studying in the U.S.A comprised of 40.5 percent undergraduates, 37.9 percent post-graduates, 12.9 percent Optional Practical Training (OPT) students, and 8.9 percent short term non-degree program students (one-year exchange students and ESL students). Though the total number of Thai students in the U.S. decreased over the past few years, the proportion of students studying for undergraduate degree programs increased 2.3 percent.

Student exchange and summer programs in the U.S. are popular choices among Thai high school students. Moreover, many Thai students enroll at universities that offer ESL and English-intensive programs with the intention of increasing their English proficiency. Also, it remains popular for students looking to enter undergraduate and graduate programs to choose a pathway program to ease the transition into a new social environment to learn more about Western culture and to immerse themselves in an English language environment with native speakers prior to enrolling in their intended study program.

Online degree programs are not popular among students due to these programs not being taken seriously by employers. Additionally, distance learners need to provide a good reason for this way of studies and it also required high levels of discipline to maintain self-driven learning over a longer period of time.

The most popular academic programs are:

- Business Administration
- Engineering
- Biology
- Mathematics
- Art
- Aviation
- Culinary
- Economics
- Law

OPPORTUNITIES:

Thai students seeking high school education present a growth opportunity for the U.S. education market. Currently, United Kingdom, Canada, New Zealand, and Australia are the major destinations for Thai students enrolling to attend high school abroad. This is mainly due to school fees in these countries being less than school fees in the U.S. Moreover, most of the high schools in United Kingdom, Canada, New Zealand and Australia work with agents

in Thailand to promote their institutions, which increases their accessibility in comparison to high schools in the U.S. that do not have cooperative arrangements with overseas education agencies.

In addition, Thai students seeking higher education and graduate degrees also present a growth opportunity in the U.S. However, these students currently face a major obstacle in that their high school grade point average (GPA) and standardized test scores often do not meet the requisite U.S. standards. This has limited the number of potential Thai students enrolling at universities in the U.S. The United Kingdom has also become a more affordable competitor destination for studying abroad after Brexit.

The number of bilingual and international schools in Thailand is increasing, with a total of 205 schools and over 130,000 students recorded in 2017. The graduates from these schools are good candidates for further education in the U.S. because they generally have superior language capabilities and are exposed to an international schooling environment.

Thai students are mostly self-funded; however, scholarships are being offered by Thai government agencies, the public sector and private sources in countries such as Japan, Germany, Italy, and China. A common scholarship would involve a Thai student receiving a scholarship to study overseas, where a specific corporation is headquartered, and then returning to Thailand to ply their trade at the Thailand office of the corporate entity that granted the scholarship, usually for a predetermined period that was stipulated in the initial scholarship offer.

RESOURCES:

- EducationUSA Website, <https://educationusa.state.gov/centers/us-embassy-bangkok>
- Fulbright Thailand – United State Education Foundation Website, <http://www.fulbrightthai.org/>
- Thai International Education Consultants Association (TIECA) Website, www.tieca.com
- Office of Civil Service Commission (OCSC) Website, www.ocsc.go.th

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TURKEY

Capital: Ankara
Population: 81,257,239 (July 2018 est.)
GDP: \$851.5 billion (2017 est.)
Currency: Turkish Lira (TRY)
Language: Turkish (official)

UNESCO Student Mobility Number:
 Turkey has 44,471 students studying abroad.

CIA World Factbook:
 40.14% of the population are under 24 years old.

OVERVIEW

Turkey's population of 80 million is relatively young when compared with many other countries. Over 30 percent of the population is under the age of eighteen. This young population provides considerable opportunities for international education institutions.

As of December 2018, there are 119 public and 67 private foundation universities serving five million students in various academic programs. 2017 figures reveal that 3.32 million students are enrolled in undergraduate programs, 480,000 in master's programs, 91,000 in PhD, 23,000 in doctors in residency programs and 3.30 million in the Open University. Public universities charge a small fee, whereas private university tuition costs range from \$2,500 to \$15,000 per year. Many outstanding students of limited means can attend private universities on merit scholarships.

Entrance into universities is competitive due to the limited capacity of Turkish universities. Students need to successfully pass two nationwide placement tests that are administered in March and in June every year. Every year an increasing number of students take the university exams. In 2016, 2,256,357 high school graduates took the exams and around 26% of these applicants were enrolled in a 4-year program, 20. in a 2-year program, and 11% to the Open University (distance education in the various subfields). The rest were unable to enter any higher education program. In Turkey, the Ministry of National Education is responsible for administering all educational services in the country, excluding higher education. The Council of Higher Education (YÖK) is a 22-member corporate public body responsible for the planning, coordination and supervision of higher education.

The capacity and quality constraints of the Turkish universities spur the demand of Turkish students to study abroad. Many students wishing to study abroad place American universities at the top of the list due to the quality of education and strong career prospects. Over 44,000 Turkish students go abroad for university education. U.S. colleges and universities already attract around one fourth of these students for undergraduate and graduate programs, as well as specialized training.

SUB-SECTORS

Higher Education

The Institute of International Education's Open Doors 2018 Statistics show that Turkey, with its

10,520 students, is the fifteenth leading place of origin for students in the U.S. Among European countries, Turkey has the second place after the U.K. with its number of students in the U.S. The enrollment level of the Turkish students is as follows:

Undergraduate: 3,474
Graduate: 4,760
Other (Language, Training, OPT Courses): 2,286

Around half of the Turkish students in U.S. universities are studying for their graduate degrees.

According to the Turkish Fulbright Commission, which is part of the Education USA network of the Department of State, following are the most popular fields of study chosen by Turkish students planning to study abroad:

- Engineering, computer science and other technical fields
- Business administration and economics (especially MBA programs in finance, marketing and international business)
- English as a second language
- Short-term certificate programs and/or summer programs (mostly in business ESL)
- Social sciences, humanities and arts (mainly psychology, political sciences, architecture and law)
- Mass communications (radio-TV, film & video production)
- Medicine and other medical fields (for the most part, advanced level residencies)

SECONDARY EDUCATION

The inadequacies of the Turkish secondary education system have been a driving force for Turkish parents to send their children to reputable boarding schools. There are hundreds of Turkish students studying at the Swiss and British schools (with tuitions around \$80,000/year). Through recent marketing efforts, Turkish student representation at the U.S. boarding schools has been increasing as well. In 2017, over 400 Turkish students pursued their studies at U.S. boarding schools. Currently, Switzerland, and the UK followed by the U.S. are listed as the most popular destinations for boarding schools among Turkish students.

Many Turks find the academic excellence at U.S. boarding schools invaluable as well as the unique residential campus environment and the superior extra-curricular activities. It is also an important for potential students and their families that graduating students are accepted at the most prestigious and competitive universities in the U.S. and around the world.

OPPORTUNITIES:

There are more students interested in quality higher education programs than can be accommodated by the most popular Turkish universities. Thus, opportunities exist for American universities and colleges to explore recruitment possibilities from Turkey. The results of the central university placement exam in Turkey are announced in the beginning of August. U.S. higher education institutions can reach out to unmatched or dissatisfied students if they are able to accept students starting in the second semester/quarter of the school year. The Ministry of National Education, the Council of Higher Education and many ministries offer scholarships to hundreds of successful students each year wishing to continue their studies abroad. These students usually apply to well-known "top universities". Cost is not a critical factor in their decision-making process as the scholarship sponsors pay for their entire studies

and the scholarship holders are usually bonded to work with their sponsoring organizations for about 4-8 years after they graduate. The student decisions are based mostly on the reputations of institutions, the faculty, and the programs.

Due to the competitive nature of the Turkish labor market and the significant level of unemployment, many students feel the necessity to have a post graduate/master's degree to be able to find better jobs. These programs are even more competitive, so students seek placement at foreign universities. Graduate studies are the most popular level of enrollment for Turkish students; close to 50% of the Turkish students in the U.S. are pursuing graduate degrees.

Several Turkish universities have cooperation programs (such as dual diploma, language programs) with American universities, enabling their students to continue their education in the U.S. institutions. Other American universities may wish to pursue such cooperative agreements as well as student exchange programs to attract qualified Turkish students.

EVENTS:

EURIE- Eurasia Higher Education Summit
February 27-March 1, 2019 – Istanbul
<https://eurieeducationsummit.com>

Linden Boarding School Tours
March 18, 2019 – Istanbul
<http://www.boardingschooltours.com/exhibit.aspx>

Study Expo Study Abroad Fairs
Language & Summer Schools Fair – February 23-March 3, 2019 – Istanbul, Ankara, Izmir
Secondary & Higher Education Fair – November 19-23, 2019 – Istanbul, Ankara, Izmir
<https://www.studyexpo.com>

IEFT Study Abroad Fairs
February 24-March 3, 2019 – Ankara, Izmir, Istanbul
October 21-29, 2019 – Ankara, Izmir, Istanbul
<https://www.ieft.net>

A2 Study Abroad Fairs
March 9-15, 2019 – Istanbul, Ankara, Izmir
October 12-18, 2019 – Istanbul, Ankara, Izmir
<http://www.a2fairs.com/>

RESOURCES:

Turkish Ministry of National Education:
Website: <http://meb.gov.tr>

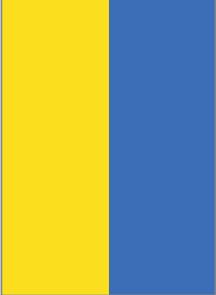
Higher Education Council of Turkey
Website: <http://www.yok.gov.tr/>

Education USA Turkey
Website: <https://educationusa.state.gov/search/node/Turkey>
The Turkish Fulbright Commission
Website: <http://fulbright.org.tr/en/>

Institute of International Education
Website: <http://www.iie.org>

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UKRAINE

Capital:	Kiev
Population:	43,952,299 (July 2018 est.)
GDP:	\$112.1 billion (2017 est.)
Currency:	Ukrainian hryvnia
Language:	Ukrainian (official)

UNESCO Student Mobility Number:

Ukraine has 77,219 students studying abroad.

CIA World Factbook:

25.52% of the population is under 24 years old.

OVERVIEW

With nearly 5.7 million students in a country the size of Texas, Ukraine is among the largest and most talented international student markets in Europe.

After decades of standing in Russia's shadow, Western institutions are gradually taking more notice of Ukrainian students. The country ranks fourth in the world in the number of people with a higher education, and the literacy rate is 100 percent among its youngest generations. In 2017/18 the number of students in primary and secondary school reached 3,922,000, in vocational school – 269,400 and in higher education – 1,538,600 students.

Despite its track record in producing talented, literate students, over the last twenty years Ukraine's educational system has suffered, which in turn has caused increasing numbers of students to look for study abroad programs. Between 2009 and 2016 the number of Ukrainians studying abroad increased by 176 percent to reach 66,668 students studying in 34 countries. The most attractive countries to study are Poland, Germany, Russia, Canada, Italy, Czech Republic, USA, Spain, Austria, France and Hungary.

According to the most recent Open Doors Report of the Institute of International Education, 1,928 Ukrainian students went to the U.S. to study in 2017-2018, which is 6.1 percent more than in 2016-2017. 49 percent of Ukrainians studying in the U.S. pursue bachelor degrees, 33 percent enroll in master's programs, 12.5 percent take optional practical training, and 5.5 percent go for non-degree programs.

The most popular destinations for prospective students are the U.S., followed by Canada, the U.K. and Western Europe. When selecting a country, Ukrainians base their decisions on a country's reputation for helping a student with career preparation and the strength of a country's overall education system. When comparing schools, prospective students consider first the quality and then the cost of tuition. The most popular programs for Ukrainians are Master's Degrees, English courses, and Bachelor Degrees. Due to a limited number of high-quality business education programs in Ukraine, business administration is the number one field of study for Ukrainian international students. Regarding competition for U.S. universities, according to agents, Canada is the U.S.' primary competitor in recruiting Ukrainians to study in primary and higher education programs, whereas the U.K. is the major competitor for language schools and programs.

MARKET ENTRY

There are many recruiting agents in Ukraine and numerous small agencies dominate the market. Most agents concentrate their efforts on serving students who plan to use their parent's income or personal savings to pay for their education.

OPPORTUNITIES

Of the students who have not already studied abroad in the past five years, 70 percent report that they plan to study abroad in the next three years. At the same time, more than half of the recruiting agents indicate that interest in studying abroad grew by an average 37 percent among Ukrainian students in 2016 comparing to 2015. Agents experiencing growth say it was due to increased awareness of international educational programs and the favorable perceptions regarding the return on investment in an international education. Agents experiencing a decline in interest say it was due to the increasing cost of living and tuition fees abroad as well as the poor economic situation in Ukraine. While it is impossible to predict the future, historical growth trends combined with the positive experience of the most agents probably mean that student interest in international education is indeed growing.

EVENTS

There are no educational trade events on a national level in Ukraine. The educational companies organize their own fairs and invite international schools to participate. Usually these fairs take place in October and February.

Sub-Sector Best Prospects

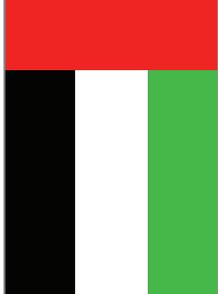
- Higher Education
- Secondary Education

RESOURCES

- Ministry of Education and Science of Ukraine, <http://mon.gov.ua/>
- Osvita.Ua (Education portal), <http://osvita.ua/>
- Analytical Center CEDOS, <http://www.cedos.org.ua/?locale=en>
- EducationUSA, <https://educationusa.state.gov/>

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UNITED ARAB EMIRATES

Capital: Abu Dhabi
Population: 9,701,315 (July 2017 est.)
GDP: \$382.6 billion (2017 est.)
Currency: Emirati Dirham (AED)
Language: Arabic (official)

UNESCO Student Mobility Number:
 UAE has 11,503 students studying abroad.

CIA World Factbook:
 22.03% of the population are under 24 years old.

OVERVIEW

The education system in the United Arab Emirates is divided into public schools, private schools and higher education. The Ministry of Education (MoE) oversees all UAE-based education councils and authorities as per the following:

Abu Dhabi Department of Education and Knowledge (ADEK) – Established in 2005, it was formerly known as Abu Dhabi Education Council (ADEC) and was primarily responsible for the management and administration of the Abu Dhabi’s public schools. It also acted as the regulatory body that provided licensing and accreditation to private schools in Abu Dhabi, Al Ain and the Western Emirates setting the minimum standards that must be met in terms of educational outcomes, health, safety, building and site requirements. In September 2017, ADEK was made a government department according to a decree issued by President Sheikh Khalifa and was named the Department of Education and Knowledge (ADEK)¹. The MoE and ADEK announced a plan to achieve the standardization of the UAE’s education systems to support a unified and highly-performing education sector across the UAE. The plan will unify the education sector through the development of the Emirati School Model across all emirates.

Knowledge and Human Development (KHDA) in Dubai – Established in 2006, KHDA² is responsible for inspecting all private schools in Dubai to ensure proper quality of education, from early learning to higher and continuing education.

Education remains a top government priority in the UAE. The UAE Vision 2021, launched in 2010, emphasizes the development of a first-rate education system³. As such, this sector continues to experience rapid expansion. The UAE’s education market is expected to grow from \$4.4 billion in 2017 to \$7.1 billion by 2023 according to a 2018 report released by the Boston Consulting Group (BCG) entitled “Where to Invest Now in GCC Private Education”.⁴ In line with Vision 2021, the UAE’s Ministry of Education (MoE) has developed the Education 2020 Strategy, which is designed to bring significant qualitative improvement in the education system. Smart learning programs, new teachers’ codes, licensing and evaluations systems, as well as curriculum revision, including teaching mathematics and science through English, are all part of the strategy.

The UAE’s federal budget for 2018 allocated 2.8 billion USD for General, Higher and University Education Programs, which represents 20% of the total budget. Due to the transient nature of the expatriate population in the UAE, parents prefer to enroll their children in international schools. Hence, demand for private education has been on the rise, leading to strong overall growth in the education sector. In the UAE, private school enrollments are expected to increase from approximately 56 percent to 66 percent over the course of the next five years according to the BCG report.

According to the BCG report, there is currently an oversupply of international private schools with high and premium-range fees in Dubai, and not enough international private schools with low- and medium-range fees. In 2017, schools with high- and premium-range fees reportedly began to advertise, implement loyalty programs, and slash their fees by as much as 33% to attract and retain students. In December 2018, education authorities in Abu Dhabi announced that a total of 10 new schools offering affordable fee structures are set to open in the emirate over the next three years adding that they will readily make plots and vacant public-school buildings available to investors for the development of new schools.⁶ According to education experts and consultants, the emirate of Sharjah is also in need for affordable schools with tuition fees ranging from 5,500 to 9,500 USD.

Similar to K12 education, higher education enrollments in Dubai has been steadily increasing according to a 2018 report by Colliers International entitled “Higher Education in Dubai, UAE Coming of Age”.⁷ The supporting factors identified include: the growing population, the popularity of Dubai with students from neighboring emirates, and the variety of institutions available. There has also been a growing preference towards international higher education institutes amongst Emirati parents and professionals seeking to complete their higher education while working in the emirate.

In higher education, only five foreign universities have full campuses in the UAE including two U.S. institutions: Rochester Institute of Technology Dubai and New York University Abu Dhabi.

SUB-SECTORS

In terms of mobility, the United Arab Emirates has 2,486 Emirati students studying in the United States for the academic year 2017-2018, a decrease of 9.7% from the previous year, according to the IIE Open Doors Open Data report.⁸ The majority of Emirati students studying abroad come from a public-school background. The top 5 receiving states are: California, New York, Texas, Florida and Massachusetts. The report provides the following segmentation:

- **Graduate Education:** 266 students (10.7%) enrolled in graduate education in 2017, a decrease of 26.1% from the previous year.
- **Undergraduate:** 1940 students (78%) enrolled in undergraduate education in 2017, a decrease of 3.3% from the previous year.
- **Non-Degree Studies:** 215 students (8.6%) enrolled in non-degree programs in 2017, a decrease of 27.1% from the previous year
- **Optional Practical Training (OPT):** 65 students (2.6%) enrolled in OPT programs in 2017, a decrease of 28.6% from the previous year.

¹ <https://www.adek.abudhabi.ae/en/Pages/default.aspx>

² www.khda.gov.ae/en

³ <https://www.vision2021.ae/en/national-agenda-2021/list/first-rate-circle>

⁴ http://image-src.bcg.com/Images/BCG-Where-to-Invest-Now-in-GCC-Private-Education_tcm9-188993.pdf

⁵ <https://www.mof.gov.ae/en/resourcesAndBudget/federalBudget/Pages/budget2018.aspx>

⁶ <https://gulfnews.com/uae/education/abu-dhabi-to-have-10-new-affordable-schools-soon-1.60785896>

⁷ <http://www.colliers.com/en-gb/unitedarabemirates/insights/market-news/2018/16-05-2018-higher-education-dubai>

⁸ <https://www.iie.org/Research-and-Insights/Open-Doors/Data/International-Students/Places-of-Origin>

OPPORTUNITIES

Higher Education

According to Colliers International, the higher education sector still offers a number of opportunities for investors and operators to grow, as currently, only 15% of total K12 students attend private universities in Dubai. Business related courses remain the most popular choice in Dubai, followed by engineering and agriculture, then media and design.

Simultaneously, there is continued demand for study in the United States in graduate, undergraduate and non-graduate studies. However, the largest number of tertiary level students from the UAE go to United Kingdom according to the UNESCO Institute for Statistics. The United States ranks second.⁹ There is also a demand to open higher education institutions in the UAE. There is a total of 30 government-affiliated scholarship granting institutions which offer a number of scholarships to a select number of top U.S. universities. Such institutions include ADEK, Abu Dhabi Investment Authority (ADIA), Abu Dhabi Police, Dubai Police, Presidential Department. Online programs are not covered under the scholarship programs. However, educational experts noted that there is a real demand for online programs in executive education.

K to 12 Education

To meet the needs of Emirati students, there is a need in the UAE for high-quality schools, with a rating of “good” or better, that cater specifically to local preferences (for example- by offering gender segregation and adequate provision of Arabic and religious studies).

For expatriate families, there is a need for high-quality schools, with fees in the low to mid-tuition range, structured around the International Baccalaureate (IB) and U.S. curriculum among others. There is also an opportunity to leverage Dubai’s drive to become a test-bed for innovation by introducing schools with modern, digital approaches to education.

EVENTS

International Education Show, Jan 30-Feb 1, 2019, Expo Center Sharjah, www.educationshow.ae

International Consultants for Education and Fairs (ICEF), Feb 11-13, 2019, Jumeirah Emirates Towers, Dubai, www.icef.com

Global Education Supplies and Solutions (GESS), Feb 26-28, 2019, Sheikh Saeed Halls, Dubai World Trade Centre, Dubai, www.gesseducation.com

Global Education and Skills Forum (GESF), Mar 22-24, 2019, Atlantis the Palm, Dubai, www.educationandskillsforum.org

Gulf Education and Training Exhibition (GETEX), Apr 17-19, 2019, Dubai International Convention and Exhibition Center, Dubai, www.mygetex.com

BETT Middle East and North Africa, Apr 22-23, 2019, Abu Dhabi National Exhibition Center, Abu Dhabi, <https://mena.bettshow.com/>

Najah Education & Training Exhibition, Oct 2019, Abu Dhabi National Exhibition Center, Abu Dhabi, <https://www.najahonline.com>

⁹<http://www.uis.unesco.org>

EdEx Mena Investment (Conference & Exhibition), Nov 2019, Le Meridien Hotel, Dubai, <https://education.knect365.com/edex-mena/>

RESOURCES

- EducationUSA Website, <https://educationusa.state.gov/centers/us-embassy-abu-dhabi>
- Abu Dhabi Department of Education and Knowledge (ADEK), www.adek.abudhabi.ae
- Boston Consulting Group (<https://www.bcg.com/en-us/offices/dubai/default.aspx>)
- Colliers International, <http://www.colliers.com/en-us/unitedarabemirates> EducationUSA www.educationusa.state.gov
- Ministry of Education, www.moe.gov.ae
- Knowledge and Human Development Authority (KHDA), www.khda.gov.ae/en

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UNITED KINGDOM

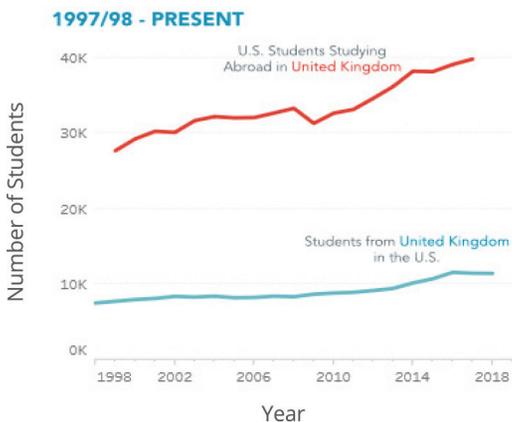
Capital: London
Population: 65,105,246 (July 2018 est.)
GDP: \$2.628 trillion (2017 est.)
Currency: British Pound (GBP)
Language: English

UNESCO Student Mobility Number:
 The UK has 34,025 students studying abroad.

CIA World Factbook:
 29.3% of the UK population is below the age of 24.

OVERVIEW

According to the Institute of International Education's 2018 Open Doors Report, the United Kingdom has maintained its rank of 14th among senders of students to the United States. The UK has consistently ranked in the top 15 for many years and has continued to be the number one sender in Europe for the past 4 years. After last year's decline of 1%, the number of British students has again declined slightly by -0.3% to a new total of 11,460 in the academic year 2017/2018. The majority of British students studying within the United States continue to be undergraduates (49.7%). Graduates make up 22.8%, followed by remaining students categorized as Non-degree at 16.7% and Optional Practical Training (OPT) at 10.8%. Students studying within the United States (-0.3%), UK students contributed \$485 million to the U.S. economy, an increase of 3.2% compared to last year. There are strong U.S.-UK study abroad ties, which are often leveraged to form a partnership entry strategy. The UK continues to be the leading destination for American study abroad students.



Source: Institute of International Education Open Doors 2017

SUB-SECTORS

Higher Education

The United Kingdom's educational system is well-established, with a highly regarded international reputation. The best prospects for attracting British students to the United States lie in the undergraduate and graduate levels of study. According to the U.S.-UK Fulbright Commission, the primary motivators for British students to study in the U.S. include the quality and flexibility of American academic programs (liberal arts education), the availability of scholarship funding, athletic/sporting opportunities, and the ability to experience and be a part of U.S. culture and campus life.

Undergraduate Education

According to Open Doors 2018, undergraduates studying within the United States make up 49.7% of students. The number of British students has declined by 1.5% for a new total of 5,691 undergraduate students compared to last year's total of 5,779.

Graduate Education

Graduate students make up 22.8% of students studying within the United States. Last year, 2,727 students made up the Graduate population and in 2018, there has been a decline of 4.1% for a new total of 2,614 students studying at the Graduate level.

Although there has been a decline of Undergraduate and Graduate students, Non-degree and Optional Practical Training (OPT) has seen an increase of students. Non-degree students make up 16.7% of the student population and has seen an increase of 1.9% bringing the new total of 1,915. OPT students make up 10.9% of the population and has seen a substantial increase of 12.3% from 2017.

OPPORTUNITIES

Exchange programs and partnerships with British universities are a common method of market entry. For U.S. institutions looking to gain exposure and to test the market, there are several UK events of interest (see Trade Events section below).

In recent years, changes to UK government policy have made U.S. universities more competitive in this market. Rising university fees and active encouragement of outward mobility both present opportunities for recruiting British students. Tuition fees were introduced in England in 1998 and have risen steadily since. The current tuition fee of £9,250 (\$12,025) was set in 2017 and has been frozen pending a university funding review. Students from Scotland, Northern Ireland, and Wales are assessed tuition fees at a considerably lower rate than their English counterparts. Students from the European Union currently pay the same tuition as British students, but this is likely to change after the UK exits the EU in March 2019.

In addition to university studies, UK students are increasingly taking advantage of other options available to them, including apprenticeships, graduate schemes, trainee schemes, or indeed directly entering the work force. UK students are a discerning consumer group with a variety of choices and opportunities readily available. Interest in U.S. study programs is high, but challenges are expected in the years ahead as the UK exits the European Union in March 2019.

EVENTS

Student World, www.thestudentworld.com
What Career/What University Live, www.whatcareerlive.co.uk/
USA College Day 2019, www.fulbright.org.uk/events/usa-college-day-2019

RESOURCES

- U.S.-UK Fulbright Commission, <http://www.fulbright.org.uk/>
- EducationUSA, <https://educationusa.state.gov/>

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VIETNAM

Capital: Hanoi
Population: 97,040,334 (July 2018 est.)
GDP: \$220.4 billion (2017 est.)
Currency: Dong (VND)
Language: Vietnamese (official)

UNESCO Student Mobility Number:

Vietnam has 82,160 students studying abroad.

CIA World Factbook:

39.08% of the population is under 24 years old.

OVERVIEW

Educational exchange is a cornerstone of the U.S. bilateral relationship with Vietnam as a top prospect opportunity for U.S. educational institutions.

The number of Vietnamese students in the United States has increased consistently for 17 straight years, according to the Institute of International Education's (IIE) annual "Open Doors" Report. The report for the 2017-2018 academic year (AY) shows that Vietnam remains the sixth leading country of origin for all international students in the United States, with 24,325 students, up 1,887 students since last AY 2016-17, an 8.4 percent increase. Vietnamese students contribute \$881,000,000 to the U.S. economy.

Of the 24,325 Vietnamese students in the United States, 69.6 percent were undergraduates, 15.2 percent were graduate level students, 8.6 percent enrolled in Optional Practical Training (OPT), and the remaining 6.6 percent were pursuing non-degree programs.

SUB-SECTORS

Engineering, Business and Management, and Math and Computer Science remain the top selected fields of study by international students in AY2017-18. Math and Computer Science were the fastest growing fields of study with an increase of 11.3 percent from AY 2016-17, followed by Legal Studies and Law Enforcement with an increase of 10.4 percent from AY 2016-17. The top 10 states for international students include California, New York, Texas, Massachusetts, Illinois, Pennsylvania, Florida, Ohio, Michigan, and Indiana.

4-year Degree University Study: More Vietnamese students are pursuing 4-year programs at universities. Business management, banking and finance, engineering, science and technology, and IT programs are often their top choices.

Community Colleges: Community colleges offer financial and academic accessibility, serve as a bridge for Vietnamese students to acclimate to the English language and American culture, and the U.S. educational system as well as a transition point to a four-year university. Vietnam is the 2nd largest country of origin for students at U.S. community colleges.

High Schools/Boarding Schools: Recently, there is growing interest among Vietnamese families in sending their children to the U.S. to enroll in high school/boarding schools to better

prepare them for a U.S. college education. In addition, parents in Vietnam cite their desire for providing a safe, comfortable environment for their kids as a primary criterion for selecting boarding schools.

OPPORTUNITIES

As President Trump noted in his speech at the APEC CEO Summit, “Vietnamese students rank among the best students in the world, and that is very impressive.” Education remains a cornerstone of the United States-Vietnam bilateral relationship.

EVENTS

There are several education fairs in Vietnam annually, including events organized by Education USA. The Education USA fairs seem to be the largest and most-attended events of their kind in Vietnam. For more information, please visit <http://www.educationusa.state.gov>

RESOURCES

- EducationUSA: <http://educationusa.state.gov/>
- Higher Engineering Education Alliances: www.heeap.org
- Institute of International Education: <http://iie.org>
- Vietnam Education Foundation: www.vef.gov

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2018 MARKET SIZES BY COUNTRY

Country	# of Students Abroad in the U.S.	% of Undergraduate Enrollment	% of Graduate Enrollment	% of Other: ESL*/OPT*HE*
Argentina	2,283	40%	39%	21%
Australia	4,908	51%	22%	27%
Brazil	14,620	50%	29%	21%
Bulgaria	826	42%	31%	27%
Canada	25,909	49%	37%	15%
Chile	2,528	28%	50%	22%
China	363,341	41%	36%	23%
Colombia	7,976	41%	36%	23%
Czech Republic	763	51%	24%	25%
Denmark	1,423	35%	15%	50%
Egypt	3,701	41%	43%	16%
Finland	768	51%	17%	31%
France	8,802	33%	27%	40%
Germany	10,042	33%	26%	42%
Hong Kong	7,162	62%	17%	21%
India	196,271	12%	49%	39%
Israel	2,327	30%	48%	22%
Japan	18,753	49%	16%	35%
Kazakhstan	1,865	48%	30%	22%
Kenya	3,322	58%	28%	14%
Kuwait	10,190	77%	9%	14%
Lebanon	1,633	33%	45%	22%
Malaysia	8,271	70%	13%	16%
Mexico	15,468	57%	25%	18%
Nigeria	12,693	46%	38%	16%
Norway	2,105	60%	14%	26%
Peru	3,235	48%	34%	18%
Philippines	3,225	55%	29%	16%
Qatar	1,127	85%	7%	8%
Romania	1,071	44%	35%	20%
Russia	5,518	43%	34%	23%
Saudi Arabia	44,432	62%	25%	13%
Singapore	4,575	45%	30%	25%
South Korea	54,555	51%	29%	21%
Spain	7,489	40%	27%	33%
Sweden	3,543	61%	9%	29%
Taiwan	22,454	31%	41%	28%
Thailand	6,636	43%	37%	20%
Turkey	10,520	33%	45%	22%
United Arab Emirates	2,486	78%	11%	11%
United Kingdom	11,460	50%	23%	28%
Vietnam	24,325	70%	15%	15%

2019 BEST PROSPECTS BY COUNTRY

Country	High School	Boarding Schools	Community College	Undergraduate	Graduate	Law School	OPT	ESL	Online Degree	Summer/Certificate Programs
Argentina				X	X			X		
Australia				X	X					
Brazil	X	X	X	X	X			X		X
Bulgaria			X	X	X					X
Canada				X	X					
Central America Region			X	X	X		X	X		X
Chile	X			X	X	X	X	X		
China	X	X	X	X	X		X	X	X	X
Colombia			X	X	X		X	X		X
Czech Republic	X	X		X	X		X			
Denmark				X	X					X
Ecuador	x			x	x			x		
Egypt				X	X				X	
France			X	X			X			X
Finland				X	X					
Germany	X			X	X			X		
Ghana	X	X		X	X	X	X		X	
Hong Kong	X	X	X	X	X		X			
India			X	X	X		X			X
Indonesia			X	X	X		X			
Israel				X	X		X			
Japan		X	X	X				X		
Kazakhstan	X		X	X	X		X	X		X
Kenya	X	X		X	X	X	X		X	
Korea, Republic of		X	X	X	X			X		
Kuwait				X	X			X		X
Malaysia			X	X	X		X			
Mexico	X	X	X	X	X			X		X

Country	High School	Boarding Schools	Community College	Undergraduate	Graduate	Law School	OPT	ESL	Online Degree	Summer/Certificate Programs
New Zealand			X	X	X	X				
Nigeria				X	X		X			
Norway				X	X					X
Panama			X	X	X		X	X		X
Peru					X			X	X	
The Philippines			X	X	X		X			X
Portugal			X	X	X				X	X
Qatar				X	X			X		X
Romania				x	x	x			x	x
Russia			X	X	X					X
Saudi Arabia				X	X		X	X		
Serbia				X	X				X	
Singapore				X	X					
Spain	X			X	X			X		X
Sweden				X	X					
Taiwan	X	X		X	X		X	X		X
Thailand	X	X	X	X	X			X		X
Turkey		X		X	X		X	X		
UAE	x			x			x	x	x	x
Ukraine				X	X			X		
United Kingdom			X	X	X					
Vietnam	X	X	X	X	X		X	X		

BEST STUDENT RECRUITMENT METHODS

Country	Education Agents	Institutional	Student Outreach	Online Outreach
Argentina		X	X	
Australia		X	X	X
Brazil	X	X	X	
Bulgaria	X		X	X
Canada		X	X	X
Central America Region		X	X	
Chile	X	X	X	X
China	X		X	
Colombia	X	X	X	X
Czech Republic	X	X		
Denmark	X	X		X
Ecuador	X	X	X	
Egypt		X	X	X
Finland		X	X	X
France	X	X	X	
Germany	X	X	X	
Ghana	X	X	X	
Hong Kong	X	X	X	
India	X	X	X	X
Indonesia	X	X	X	X
Israel	X	X	X	X
Japan	X	X	X	
Kazakhstan	X	X	X	
Kenya	X	X	X	
Korea, Republic of			X	X
Kuwait		X	X	
Malaysia	X	X	X	X
Mexico	X	X	X	X
New Zealand		X	X	X

Country	Education Agents	Institutional	Student Outreach	Online Outreach
Nigeria	X	X	X	
Norway		X	X	X
Panama		X	X	
Peru		X	X	X
The Philippines	X	X	X	
Portugal		X	X	X
Qatar	X		X	
Romania		X	X	
Russia	X	X	X	X
Saudi Arabia		X	X	
Serbia		X	X	X
Singapore		X	X	
Spain	X		X	X
Sweden	X	X		X
Taiwan	X	X	X	X
Thailand	X	X	X	X
Turkey	X	X	X	X
Ukraine	X	X		
United Arab Emirates			X	X
United Kingdom		X	X	X
Vietnam	X		X	

THANK YOU

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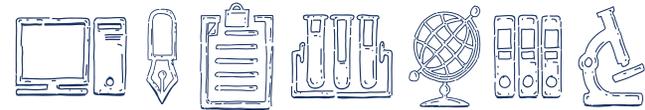
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“My interests have led me to a greater purpose—to improve water quality in Kenya.”
- NELSON, KENYA

Shorelight Education provided Nelson a path to study in the U.S.—with the assurance he needed to feel supported, inspired, and motivated. Through Shorelight, he is growing his career aspirations as an Environmental Sciences major at Auburn University.

SHORELIGHT shorelight.com

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