

The International Trade Administration's mission is to create prosperity by strengthening the competitiveness of U.S. industry, promoting trade and investment, and ensuring fair trade and compliance with trade laws and agreements.



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ADMINISTRATION

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U.S. Commercial Service  
**2023/24 Edition**

Education and Training Services Guide:  
A Reference for U.S. Educational Institutions



INTERNATIONAL  
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# Education and Training Services Guide

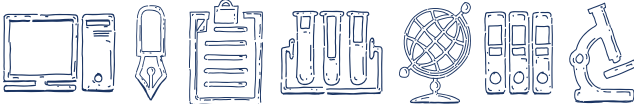
A Reference for U.S. Educational Institutions

**2023/2024 Edition**



2023/24 Edition

# EDUCATION & TRAINING SERVICES GUIDE





# M Square Media

is your solution to diversity  
your international enrollment

M Square Media (MSM) is a leading provider of full-service international education solutions for educational institutions around the world



## Our Services



### Global Recruitment Platform

#### MSM Unify Platform:

Marketplace unifying educational institutions, students, service providers, and support services.

Students discover and compare study destinations, institutions, programs, and fit—all with end-to-end support services throughout the process.



### In-Country Office

#### In-Country Support:

Global and in-country offices with a dedicated team on the ground.

Brand building, promotions, agent management, lead generation and qualification, application screening, end-to-end student support, including pre-departure sessions.

Performance-based model assures complete alignment of enrollment objectives.



### Educational Partnerships & TNE

#### Education Support:

Innovative enrollment, revenue, and partnership models, including Pathways, TNE, & PPP. We offer:

- Global Pathway program
- Partner matching
- Project management
- Jurisdictional approvals
- QA systems and processes

## Making Education Accessible to Students Everywhere

### Get in Touch with MSM

Making Education Accessible to Students Everywhere.

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M Square Media (MSM)



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## Introduction

According to the latest data released by the U.S. Department of Commerce's Bureau of Economic Analysis (BEA), education-related travel exports ranked the 9th largest among service exports in 2022. During the 2021/2022 academic year the U.S. hosted nearly one million international students and reported \$37.68 billion in education-related travel exports, which supported over 335,423 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. Globally, it is expected that education will be a \$7 trillion industry by 2025.

Education is an important 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. In 2019, the Commercial Service launched USA: A Study Destination to assist the U.S. international education industry to compete. In 2022, U.S. international education was included in the U.S. Department of Commerce, International Trade Administration National Export Strategy. Increasing trade and investment opportunities for U.S. educational institutions and entities is, therefore, a priority at the U.S. Department of Commerce's International Trade Administration.

This 2023/2024 bi-annual 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 60 countries, covering trends, demand and more. This new edition contains information on digital marketing outreach strategies and scholarships. 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 <https://www.trade.gov/education-industry>



**Gabriela Zelaya**

Global Education Team Leader

\*Source: Table 3.1 U.S. International Trade in Services, U.S. Bureau of Economic Analysis, Preliminary release March 23, 2023 (2022 data will be released June 2022).

## What Can the International Trade Administration 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 (ITA). Our global network of approximately 2,100 trade and investment professionals are based in 106 U.S. cities and U.S. Embassies and Consulates in more than 75 markets. 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.

Industry & Analysis (I&A), an agency within the U.S. Department of Commerce's International Trade Administration, is an advocate for the development of U.S. service industries in international trade. Within ITA, the Office of Supply Chain and Professional and Business Services (OSCPBS) promotes and supports the U.S. education service sector.

### Our Services

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 study 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 ITA can help your education institution or Intensive English Program increase its international student enrollment, please visit [trade.gov/education-industry](https://trade.gov/education-industry) and contact your local ITA office. A list of offices appears at the back of this guide. You can also connect with our local U.S. based offices at [trade.gov/contact](https://trade.gov/contact).

- **Gold Key Matchmaking Service.** Meet pre-screened high schools, universities, agents, and other partners.
- **Single School Promotion.** Set up an event featuring your educational institution and meet players in the international education field.
- **International Partner Search.** Find schools, agents, and other educational organizations that match your criteria.
- **Trade Fairs and Catalog Shows.** Identify international education fairs for your institution that match your criteria.
- **International Market Research.** Receive market research reports on target markets around the world.
- **Trade Missions.** Attend a trade mission led by U.S. Department of Commerce.
- **Virtual Education Fairs and Virtual Connection Programs.** Connect with agents, counselors, university partners, and foreign government officials using online platforms—without leaving your office.
- **Website Globalization Reviews.** Improve your online international reach and receive Search Engine Optimization (SEO) recommendations.



**"USA: A Study Destination"** is a U.S. Department of Commerce, International Trade Administration industry engagement effort to promote the United States as a premier destination for international students to study. This effort aims to support the U.S. international education sector and boost U.S. education exports, including service exports which are generated when international students pay for tuition, housing, books, and other fees.

Key elements of "USA: A Study Destination" include:

- Providing tools and a platform for study states (composed of colleges and universities, community programs, and similar entities representing education within U.S. states) to address challenges faced by increased global competition in the international education sector, and to foster economic growth.
- Convening public and private entities to develop promotion, recruitment, and market-entry strategies. This will enable the United States to better compete against other countries working to recruit international students as part of their national economic strategies.
- Offering new opportunities for study state consortia and similar entities to participate in programming aimed at increasing U.S. educational service exports.

To view the list of study state consortia, please visit [trade.gov/usa-study](https://trade.gov/usa-study).



# ARGENTINA

**Capital:** Buenos Aires  
**Population:** 46.6 million (2023 est.)  
**GDP (Purchasing Power Parity):** \$986.13 billion (2021 est., in 2017 dollars)  
**Currency:** Argentine peso (ARS) (\$)   
**Language:** Spanish (Official)

### UNESCO Student Mobility Number:

Argentina has 9,998 students studying abroad according to UNESCO.

### CIA World Factbook:

39.21% of the Argentine population is under 25 years old.

### OVERVIEW

Argentina has a long history of providing tuition-free access to local schools and universities, which in turn helps to generate a qualified workforce.

The education system is composed of primary school, secondary school - level one, secondary school - level two, and university. Students can attend public institutions tuition-free or can attend private schools. Four of Argentina's higher educational institutions are listed in the "Times Higher Education (THE) World University Ranking 2021".

Local universities offer a range of programs and degrees. Some popular fields of study in Argentina include: law and business (23%), social sciences (11%), and science, ICT, engineering and design (14%).

The United States is a leading destination for students from Argentina, according to UNESCO data. Recent events have affected Argentine academics. For example, during 2020 and part of 2021, Argentina's education system was closed for in-person academic activities (March-December) due to the quarantine shutdown. Moreover, since 2018, Argentina has experienced a sharp economic downturn, affecting families' ability to fund international education.

### Exchange Rate Problems

The government of Argentina employs strict capital controls, which affects Argentines' ability to freely access and pay for goods and services in U.S. dollars. Additionally, in recent years, the country has experienced high levels of inflation which, have significantly affected purchasing power. For example, since 2017, the official exchange rate has fallen from about US\$1:AR\$20 to now US\$1:AR\$101, and the unofficial "blue" rate is currently roughly double the value.

# MARKET BRIEFS



## SUB-SECTORS

### Undergraduate Education

Although Argentine public universities are free-of-charge, more than 1,218 students were enrolled in undergraduate programs in the United States during the 2021-2022 academic year. During academic year 2020-2021, there were 1,020 Argentine students pursuing undergraduate degrees in the U.S. This was a 3.7 percent decrease from the 2019-2020 academic year.

### Graduate Education

During the 2019-2020 academic year, the number of students (891) had decreased due to local economic downturn. The number of students decreased even further in the 2020-2021 academic year to 803. For 2021-2022, the number increased to 987 up nearly 23% from the previous year.

### Non-Degree

In the 2021-2022 academic year, there were 141 students from Argentina were enrolled in non-degree programs in the United States, up 123% from the previous year when only 63 students from Argentina were enrolled. The 2019-2022 academic year saw 153 Argentine students enrolled in non-degree programs in the United States.

### OPT - (Optional Practical Training)

During the 2021-2022 academic year, there was a significant increase in the number of OPT students from Argentina, currently at 372 students. In academic year 2020-2021, the number of Argentine OPT students declined another 8.9 percent to 298 students from 327 students the previous academic year.

### OPPORTUNITIES

According to the English Proficiency Index released by Education First, Argentina has by far the highest level of English proficiency in Latin America, but there are still opportunities for intensive English program providers, including targeted English programs on selected topics such as finance, law, and accounting.

Exchange programs and partnerships with higher education institutions in Argentina is a common method for market entry.

Argentine universities are interested in forming partnerships with U.S. higher education institutions to teach Spanish and Latin American studies courses to U.S. students coming to study in Argentina.

Popular fields of study for Argentinian students are engineering, law, and business. Undergraduate education in Argentina's public universities is tuition-free, and long-term study abroad programs often do not make sense for Argentine students from a financial perspective. However, U.S. colleges and universities may want to consider highlighting short-term programs to students attending public universities in Argentina.

The government of Argentina has launched a program to promote academic and professional education for Argentines abroad. For more information, please visit <https://www.argentina.gob.ar/ciencia/raices>.

### CHALLENGES

Rising tuition at U.S. universities discourages students from choosing U.S. higher education institutions.

Lower levels of English proficiency postpone the decision to study in the United States. That said, high schools are increasing their focus on English to improve proficiency.

High inflation and poor currency exchange rates for Argentine currency make it expensive for Argentinian students to study abroad.

The Argentine administration placed a 95% tax on all foreign purchases including tourism and education.

The Argentine school year is from March to December with a summer break from January to February which can present alignment challenges. That said, there may be opportunities for short term exchange programs.

Increased competition from other nations, especially European countries. Many Argentines have historical linkages to Europe.

### DIGITAL MARKETING STRATEGIES

The most popular media sites used by students are WhatsApp, Facebook, Instagram, LinkedIn, Twitter, TikTok, and YouTube. The most popular platforms used by Argentine students are Zoom, Google Meet, and Microsoft Teams. Students stream videos through YouTube, Instagram, and TikTok. LinkedIn is one of the sites most used to search for job opportunities, together with university platforms and university bulletin boards.

Parents and students find information on educational opportunities through advertisements on social media, email, and websites. Some private schools and universities have counselors, but many parents and students listen to recommendations from family and friends regarding education.

### EVENTS

- FIESA (Feria Internacional de Educación Superior Argentina/The International Higher Education Fair of Argentina)  
Mar del Plata, Province of Buenos Aires, Argentina  
Dates for 2023 will be confirmed
- ExpoUniversidad  
Buenos Aires

## RESOURCES

- U.S. Commercial Service – Argentina: <https://www.trade.gov/argentina>
- The Fulbright Program: <https://fulbright.edu.ar/>
- ICANA: <https://www.icana.org.ar/>
- Argentine Government Ministry of Education: <https://www.argentina.gob.ar/educacion>
- Government's education program: <https://www.educ.ar/>
- Campus Global <https://campusglobal.educacion.gob.ar>
- U.S. Law School Virtual Fair Home U.S. LL.M. Fairs ([usllmfairs.org](http://usllmfairs.org))

## U.S. COMMERCIAL SERVICE CONTACT

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# AUSTRALIA

<b>Capital:</b>	Canberra
<b>Population:</b>	26.4 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$1.27 trillion (2021 est., in 2017 dollars)
<b>Currency:</b>	Australian Dollars (AUD)
<b>Language:</b>	English

## UNESCO Student Mobility Number:

Australia has 13,742 students studying abroad according to UNESCO.

## CIA World Factbook:

31.61% of the Australian population is under 25 years old.

## OVERVIEW

Education services is one of Australia's top five exports, valued at \$26 billion (2019). In September 2021, the number of international students was 557,836. The top five countries where international students come from are: China (30%), India (17%), Nepal (8%), Vietnam (4%), and Malaysia (3%). During the 2019-2020 academic year, there were 8,252 study abroad students from the United States in Australia.

Australian students are increasingly choosing to pursue studies 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. Approximately 3,900 Australian students studied in the United States in the 2021-2022 academic year.

There is a broad academic and geographic distribution of Australians at U.S. universities. Undergraduate Australian students tend to focus on liberal arts and sciences, business, international relations, film, or art. Graduate students generally pursue law, business management, or advanced science.

## SUB-SECTORS

### Education Technology

The Australian education technology market is dynamic and evolving. With around 600 Australian EdTech companies spread across Australia, this market is currently valued at US\$1.4billion and is expected to grow.

The most common solutions of EdTech organizations in Australia target the primary, secondary, and higher education sectors which is closely aligned with government spending in these areas. The most common products offered are online courses, educational content, learning management systems, and teaching tools (EduGrowth 2022).

Some of the most appealing EdTech products and services to the Australian market include



STEM in education such as robotics and coding, innovative classroom resources, Augmented Reality/Virtual Reality, and gamification.

## OPPORTUNITIES

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 U.S. university life: collegiate sports, interdisciplinary/liberal arts degrees, and life within a close-knit campus environment.

The Summer Work Travel program provides qualified foreign students, including Australia, with an opportunity to live and work in the United States during their summer vacation from college or university to experience life in the United States.

More details: <https://j1visa.state.gov/programs/summer-work-travel>

Opportunities for athletic scholarships and sports programs at all levels of competition are popular among Australian students. Australia ranks amongst the top five sending countries of student-athletes to the United States. Some of the popular sports are basketball, tennis, soccer, track and field, and swimming.

## DIGITAL MARKET STRATEGIES

### Social Media

Australian students are regular users of Instagram, TikTok, and BeReal. School Counselors largely use e-mail for their communications with parents. YouTube is one of the most popular video streaming platforms. Students mainly use Seek.com, Indeed.com, LinkedIn and campus' newsletters for job opportunities.

### Best Prospects

Undergraduate/OPT, Graduate, and Online Degrees

### Best Student Recruitment Methods

Institutional, International Education Consultants, and online outreach

### Local Scholarships Program

The Ramsay Centre and John Monash Foundation offer postgraduate scholarships for Australian students to overseas universities including the United States. The Australian-American Fulbright Commission offers postgraduate scholarships to Australian citizens across all career stages.

## EVENTS

- EducationUSA Australia - Events | Facebook - <https://www.facebook.com/EducationUSAAustralia>

## RESOURCES

- U.S. Commercial Service – Australia: <https://www.trade.gov/australia>
- Australasian Council on Open, Distance and eLearning (ACODE): <https://www.acode.edu.au/>
- Department of Education, Skills and Employment: <https://www.education.gov.au/>
- EducationUSA Australia: <https://au.usembassy.gov/education/>
- Tertiary Education Quality and Standards Agency: <https://www.teqsa.gov.au/>

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# AUSTRIA

**Capital:** Vienna  
**Population:** 8.9 million (2023 est.)  
**GDP (Purchasing Power Parity):** \$484.69 billion (2021 est., in 2017 dollars)  
**Currency:** Euros (EUR)  
**Language:** German

## UNESCO Student Mobility Number:

Austria has 23,998 students studying abroad according to UNESCO.

## CIA World Factbook:

24.37% of Austria's population is under 25 years of age.

## OVERVIEW

Highly qualified Austrian students and professionals actively participate in study abroad programs, ranging from short-term to year-long. Austrian professionals attend training programs in the United States at the individual and corporate levels. During the 2019-2020 academic year, 1,105 Austrians formally enrolled in academic programs longer than 90 days in the United States, a slight increase from the previous year according to the 2020 Institute of International Education's Open Doors Report. For academic year 2020-2021, there was a decrease of about 41%, which was mainly due to Covid-related travel uncertainties. However, the 2021-2022 academic year saw a 49% increase over the previous year with 977 students in the United States. Despite the downfall during the pandemic, the United States remains one of the top study-abroad destinations for Austrian students, ranking 4th place of the European countries after Germany, the U.K., and Switzerland per UNESCO reporting.

The Covid-19 pandemic interrupted academics throughout the world, which continues to affect Austrian study abroad levels. While posing challenges for physical study abroad, the pandemic underscored the importance of digital education. This encouraged the Austrian government to prioritize digital education solutions for all levels of education, in turn opening strong potential for U.S. providers. Distance learning also gained traction as Austrian students and professionals are continuously seeking alternatives to short-term, in-person study programs.

English is the first foreign language that Austrians learn as early as primary school. Progressing through higher education, Austrian students generally have strong English skills, which contributes to their strong interest in a broad range of study in the United States, including in the areas of STEM, liberal arts programs, and professional degrees. Leading U.S. study destinations for Austrian students are New York, California, Massachusetts, Illinois, and Florida. Various EU and Austrian scholarships encourage study abroad primarily through university-to-university exchange programs. International study experiences complement Austria's strong education system, allowing students and professionals to further advance their English skills and gain expertise not offered in Austria.

	2018/2019	2019/2020	2020/2021	2021/2022
Austrian Students Studying in the United States (longer than 90 days)	1,098	1,105	655	977

Source: 2022 IIE Open Doors Report on International Educational Exchange

## Education System

Austria's education system ranks 6<sup>th</sup> among 63 countries worldwide for talent competitiveness, according to the 2020 Institute for Management Development (IMD) World Talent Report. The goal of lifelong learning is highly integrated in the Austrian education system and society. This report ranks Austria 2<sup>nd</sup> in prioritizing employee training and 3<sup>rd</sup> in implementing apprenticeships. Austria also reaches higher ranks in quality of education measures, at 11<sup>th</sup> place for primary school and 7<sup>th</sup> place for secondary school. These high rankings are due in part to the Austrian government's strong investment in its education system and professional development, which is one of the highest among OECD countries.

In Austria, school attendance is compulsory for nine years, including one year of preschool, four years of primary school, and four years of lower secondary school. At age 16, students may choose either a vocation or academic track program based on their field of interest and academic strengths. The vocational track lasts six years, with a focus on practical life skills and preparation for an apprenticeship. Students have a choice from seven vocational areas: metal, electrical, wood, construction, trade/office, services, and tourism. The academic track is comparable to a college preparatory school in the United States, where students prepare to attend university. Austria has over 2,700 secondary schools with around 751,000 students enrolled for the 2019-2020 academic year.

The 70 universities in Austria include 58 public and 12 private universities. Public universities offer free tuition with students paying modest fees. Specialized universities concentrate on arts (6), medicine (3), applied sciences (22), and teacher education (14). In the 2019-2020 academic year, 348,851 students studied in universities nationwide, a 7% total decrease from the previous year. Within this data, the number of international students increased by 10.6% to 100,800, encouraged by the introduction of the Bologna process and the opening of EU exchange programs to students outside of the EU.

## COVID-19 Impact

During the spring 2020 Covid-19 crisis, the Austrian government instituted extensive restrictions including school closures. Distance learning was quickly adopted, with the government providing computers to students as needed. In May 2020, students returned to school on a part-time basis before the summer break. The fall 2020 school year opened with in-person instruction following health-oriented measures, but distance learning was once again instituted by the Austrian government through May 2021. The May 2021 reopening was supported by additional health-oriented measures and weekly student and faculty and staff testing. The current school year, 2021-2022, started with in-person instruction for all schools and universities but had to be switched back to distance learning in November 2021 following the local government's announcement of a nationwide lockdown due to the increasing Covid cases. The Austrian

government's recognition of the importance of education technology and distance learning options is reflected in the Ministry of Education's strategic planning and budget through 2024, which opens opportunities for U.S. solutions providers.

## SUB-SECTORS AND OPPORTUNITIES

### Education Technology (EdTech)

In response to the Covid-19 pandemic, the Austrian government prioritized investment in digital education. The Austrian Ministry of Education has increased its existing budget for its digitalization efforts in education to \$278 million through 2024. The goal is to provide digital learning equipment and solutions, as well as needed digital infrastructure, in public primary and secondary schools. Another \$50 million was budgeted for digital and social transformation in universities. These approved projects are recurrently being managed by the appointed groups of public universities that determine the specific needs for implementation. Procurement announcements are expected to be posted on the Ministry's tendering platform UniControlling ([https://unicontrolling.bmbwf.gv.at/index.php?option=com\\_content&view=article&id=36&Itemid=155](https://unicontrolling.bmbwf.gv.at/index.php?option=com_content&view=article&id=36&Itemid=155)). For more details on the digitalization in universities, please visit the Digital University Hub (<https://www.digitaluniversityhub.eu/>) initiated by the Ministry of Education, which addresses these projects and consult with the U.S. Commercial Service in Austria. Other platforms, such as ANKÖ (Austrian) (<https://www.ankoe.at/en>) and OpenTender EU (<https://opentender.eu/at/>), are also avenues for education-related public procurements.

### Distance Learning

Due to international travel restrictions resulting from the Covid-19 pandemic, demand has increased for online and distance learning. In addition to students seeking to earn college credits, many Austrian companies are opting for online professional development training opportunities for their employees. Many take advantage of the free online education platforms; however, fee-based platforms for specialized or customized courses and formal certifications are also becoming more popular.

### Scholarships and Grants

The Austrian Agency for International Cooperation in Education and Research (OeAD) manages a series of scholarship programs for international study. This includes the popular Erasmus+ Program, which funds students to study, teach, complete an internship, or collaborate internationally with partner higher education institutions. To apply for these scholarships and grants, students apply through their home university in Austria to study abroad at their school's international partner university. The norm in Austria for school and university exchanges are two-way programs; therefore, U.S. counterparts seeking to attract Austrian students should be prepared to also send their students to Austria. Fulbright Austria also has a very active program, providing grants to qualified Austrian students to teach, engage in research, or study in the U.S. and offering American students parallel opportunities in Austria.

### Exchange Programs/Intensive English Language Programs

Customized exchange programs that vary from short-term (a couple weeks) during academic breaks to one-year long, are attractive to Austrian university and high school students. Interest is

especially strong in unique programs that include STEM and intensive English language courses, hands-on scientific field and lab experiences, and professor-student and private company engagement. Austrian schools and universities have indicated to the U.S. Commercial Service in Austria their plans to resume and/or expand exchange programs starting this academic year, 2021-2022, especially given the possibility to travel to the U.S. on student visas.

### Large International Community

Vienna is a major global hub with at least 40 international organizations, including one of the largest U.N. headquarters, OPEC, in addition to diplomatic representation and non-governmental organizations, among others, employing more than 6,000, of whom three-fourths are foreigners. This large international population is supported by a growing number of international and bilingual schools. International schools in Vienna hold solid partnership potential for U.S. high schools and universities to promote their long-term programs for international students.

The U.S. Commercial Service in Austria offers customized introductions and promotional programs for interested U.S. universities and other education institutions to meet targeted Austrian universities, schools, and private entities. The U.S. government's EducationUSA advising center is also active in Austria, providing student advising and promoting Study in USA. Unlike in some other countries, Austrian students do not work through private educational representatives to find international study opportunities; rather, they apply directly to U.S. education institutions.

### U.S. Student Visa

For details on the U.S. student visa application process, please visit: <https://at.usembassy.gov/embassy-vienna-resumes-limited-visa-services/>.

## DIGITAL MARKETING STRATEGIES

The most used social media sites by students are WhatsApp, Facebook, Instagram, LinkedIn, Twitter, TikTok, and YouTube. For streaming videos, YouTube, Instagram, and Tiktok are the most popular platforms. Google is the search engine extensively used by Austrian students for any given topic. Communication platforms such as Zoom, Google Meet, and Microsoft Teams are being utilized by faculty members and students, which have proven to be efficient. For job opportunities, LinkedIn, [Karriere.at](https://www.karriere.at/), [Uni.at](https://www.uni.at/), [Studentenjob.at](https://www.studentenjob.at/), [Indeed.at](https://www.indeed.at/), individual university websites, and digital bulletin boards are mostly used.

Information on educational opportunities can be viewed on the websites of the Federal Ministry of Education, Science and Research, of the OEAD – Austrian Agency for international mobility and cooperation in education, science and research. Other platforms such as [StudyinAustria.at](https://www.studyinaustria.at/) and [Studienwahl.at](https://www.studienwahl.at/) also provide helpful information on educational opportunities.

## EVENTS

BeSt3 Student Fair  
Vienna, Austria  
March 7-10, 2024  
<https://bestinfo.at/en/>

## RESOURCES

### U.S. Government

- U.S. Commercial Service- Austria: <https://www.trade.gov/austria>
- Fulbright Austria: <http://www.fulbright.at/>
- U.S. Embassy Visa Information: <https://at.usembassy.gov/>

### Austrian Government

- Federal Ministry of Science, Research and Economy: <https://www.bmbwf.gv.at/>
- “Österreichischer Austauschdienst OeAD” – Austrian agency for international mobility and cooperation in education, science and research: <https://oead.at/en>

### Austrian Grants

- OeAD Site Grants: <https://grants.at/de/>
- EdTech Austria: <https://www.edtechaustria.at/en/>
- Vienna Board of Education: <https://www.bildung-wien.gv.at/>
- Statistik Austria: [https://www.statistik.at/web\\_de/statistiken/index.html](https://www.statistik.at/web_de/statistiken/index.html)
- Education platform: <https://studyinaustria.at/en/>
- Digital University Hub: <https://www.digitaluniversityhub.eu/>
- Procurement platforms: UniControlling <https://unicontrolling.bmbwf.gv.at/>
- ANKÖ <https://www.ankoe.at/>

### Other

- Opentender EU: <http://www.opentender.eu>

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# BELGIUM

<b>Capital:</b>	Brussels
<b>Population:</b>	11.91 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$599.81 billion (2021 est., in 2017 dollars)
<b>Currency:</b>	Euro (EUR)
<b>Language:</b>	French, Dutch, and German

### UNESCO Student Mobility Number:

Belgium has 17,168 students studying abroad according to UNESCO.

### CIA World Factbook:

28.42% of the population in Belgium is under 25 years old.

## OVERVIEW

In all tracks, education standards in Belgium are high. Annual reports by economic organization OECD rank Belgium’s education as one of the top 10 among all evaluated countries, with students performing above average in science, mathematics, and reading. Investment in education is also one of the highest among the 40 OECD countries.

Many schools and universities in Belgium offer courses in English. Many programs, such as the one offered by American Field Service (AFS) Belgium, allow students to go study in the U.S. and improve their English. Depending on the educational institution, students start studying English either in primary or secondary school (equivalent to elementary school, middle school, and high school). English is currently spoken by one-third of the city of Brussels which is renowned for its international population: 32% of residents are not Belgian and many of them speak English.

## SUB-SECTORS

### Secondary Education

Many Belgian high school students decide to study in the U.S. on an exchange program because they have dreamed of attending such schools due to popular American media. They see the school system portrayed differently and more interesting than European schools, offering different types of classes which may not exist in Belgium (e.g., pottery class, architectural drawing, theatre) as well as a completely different sport culture (i.e. sports competitions involving different schools, different sports including American football and baseball, cheerleading). Once they have graduated from a Belgian school, some students decide to go study for one year instead of a semester in order to get an American high school diploma as well.

### Higher Education

According to the Open Doors report, during the 2021/2022 academic year, there were 988 international students coming from Belgium and studying at U.S. higher education institutions. While this was an increase of 30% over the previous year, it is still not quite to the level of pre-

pandemic. Last year's low numbers were a direct consequence of the COVID-19 pandemic, that resulted in fewer study opportunities for Belgian students seeking to enroll in U.S. education institutions. Before the pandemic, in 2018/2019, the number of Belgian students enrolled was 1,073. For 2019/2020, the academic year during which the pandemic started, 1,055 Belgian students were enrolled, roughly the same number as in 2018/2019.

### Undergraduate

In 2021/2022, 387 out of the 988 Belgian students studying in the U.S. were enrolled in undergraduate courses, a decrease of 3.3%.

### Community College

The Belgian equivalent of an American community college in the Dutch-speaking community would be a "hogescholen" (college). In Flanders, a university college is a school for all forms of higher education outside the university. In the French-speaking community, they have what is called "hautes écoles". These institutions provide either a short-type education (for a professional bachelor, delivered after three years) or a long-type education (a bachelor's degree followed by a master's degree). Entry requirements are the same as for universities: a Belgian high school diploma (CESS) or another diploma which is recognized by Belgium. These institutions offer a more concrete-oriented type of education, opposed to universities which have a more theoretical and abstract approach. Also, university is more expensive than hautes écoles and hogescholen, which is something that Belgian students take into consideration.

### Graduate Education

In 2021/2022, 314 out of 988 Belgians studying in the United States were enrolled in graduate courses, an increase of 50% over the previous year.

### Professional Training Services

During the 2021/2022 academic year, 125 out of 988 Belgian students in the United States pursued an Optional Practical Training, which represents about a 2% increase compared to 2020/2021 when 122 out of 756 students enrolled for that course of studies.

### Non-degree

In 2021/2022, 162 out of 988 Belgian students in the United States attended non-degree programs such as English language or short-term studies, which represents nearly a 550% increase compared to 2020/2021, where 25 out of 756 students enrolled for that course of studies.

## OPPORTUNITIES

### Undergraduate and Graduate

Belgian students are particularly attracted to studying in the fields of humanities, intensive English, health professions, fine and applied arts, physical and life sciences, and social sciences.

The United States is one of the top five study abroad destinations for Belgian students. In Belgium, the Fulbright Commission helps Belgian students with no-cost educational advising services (<https://educationusa.state.gov/>), grants for graduate study (Master's or Ph.D.), pre-doctoral and post-doctoral research or university lecturing in the United States, as well as with special programs for language teaching assistants in Dutch, French, and German and secondary school teachers of English. Anyone wishing to study in the U.S. can visit the Commission's website (<http://www.fulbright.be/>) and attend the annual Brussels College Night, Belgium's largest U.S.-based college fair organized. Belgian universities also have excellent exchange programs with U.S. universities in all regions of the country. Unfortunately, studying in the United States is expensive, especially when compared to the standard low-price fee of Belgian universities (provided that the student comes from either Belgium or another European country). Academic costs range from \$10,000 to \$55,000 per year. Scholarships are also more difficult to get than the ones that Belgian universities grant to study in Europe.

### Community College

Some community colleges don't specify a minimum high school GPA nor do they require international students to take an English language test. Furthermore, the admission process is easier for such institutions when compared to universities and tuition fees are much lower. Students should verify whether their country will accept community college credits earned in the U.S. In fact, some community colleges in the United States itself may not accept some (or all) of the credits earned through this track. Some universities in Belgium might accept credits previously earned in community colleges. However, this does not mean that one can immediately transfer to four-year colleges and universities in other countries, including the United States. To find out more, students can contact their local Fulbright Committee or U.S. embassy office.

### Non-degree

Thanks to its efficient educational system and the study of foreign languages, many Belgian students are keen on practicing English and going overseas for a short period of time for professional development, personal enrichment or to transfer credits from specific courses to a Belgian educational institution. The number of Belgian students attending non-degree courses in the United States for the year 2021/2022 was 162 out of 988 (17%).

### Secondary Education

AFS Belgium offers programs such as an eight-month exchange in the United States, which costs around \$13,500. Many students go to the United States for a whole year or just one semester, either before getting their high school diploma (in which case they would lose a school year, since that particular year would not count once they get back to Belgium) or after (where they would get a second high school diploma in the U.S.). Most Belgian high school students prefer to study in an English-speaking country, in order to improve what they have already learned at school.

### Online Programs

Classes are facilitated through a variety of methods, including websites, mobile apps, email, telephones, and more. To receive credit from a U.S. institution for distance learning, the student

usually pays a tuition fee. There are options now available for online learning such as Massive Open Online Courses (MOOCs) that are usually tuition-free, but in most cases do not offer credit. The U.S. Department of State also facilitates a free in-person MOOC Camp program in many countries. Belgian students taking full-time online programs are not eligible for U.S. student visas. Belgium has become very accustomed to online classes and over the course of last year, all universities recognized by the French-speaking region of Belgium switched exclusively to online classes because of the COVID-19 pandemic, while going back to a mix of virtual and physical attendance once the number of cases decreased remarkably. Universities that are recognized by the Dutch-speaking community intermittently switched between online classes and in-person classes, or mostly online if the number of COVID-19 cases was too high.

## Research and Development

Belgian research has focused on such areas as medicine, biochemistry, statistics (Quetelet) and astronomy. The country's researchers have received prestigious international scientific prizes for their work in these areas. In Belgium, the Fulbright Commission helps Belgian students with no-cost educational advising services, grants for graduate study (Master's or Ph.D.), pre-doctoral and post-doctoral research in the United States. The Fulbright Visiting Scholar Program provides grants to conduct post-doctoral research at U.S. institutions from an academic semester to a full academic year. According to Eurostat, in 2021 Belgium ranked a close third (in Europe) in the highest percentage of its GDP (3.2%) to R&D.

## Professional Training Services

Vocational placement and vocational training are organized by regional or community organizations. These public services can give information about all types of training which are available. The following are the public services operating in each region:

*FOREM* (in French) in Wallonia, *Bruxelles Formation* (in French) which is responsible for the vocational training of French speakers in the Brussels-Capital Region. The *VDAB* (in Dutch) provides services for Dutch speakers living in Brussels, *VDAB* (in Dutch) in Flanders. For French speakers, *Bruxelles Formation* is the official body with responsibility for vocational training for French-speaking jobseekers and employees in the Brussels-Capital Region. *CEFORA* is a training center for employees of Joint Committee 218 and the *efp* is a training center for SMEs that runs alternating education courses and training courses leading to qualifications (FR) for candidates aged at least 15 years old.

For Dutch speakers, The *VDAB* is in charge of training Dutch-speaking jobseekers and workers in the Brussels-Capital Region and *Syntra Brussels* offers a large range of training courses for adults and businesses.

## DIGITAL MARKETING STRATEGIES

- Belgian students mostly use LinkedIn, YouTube and Google.
- The most popular social media sites are Facebook, Instagram, WhatsApp, and Snapchat.
- Students often research information on any given topic through the popular search engine Google and they often acquire information from Wikipedia.
- The platforms that Belgian students use to seek job opportunities are university

platforms, university announcements, LinkedIn, Vdab, Jobat and Indeed.

- The most popular video streaming platforms in Belgium are YouTube, Netflix, and Amazon Prime.
- In-country schools and competitor countries use public announcements, as well as their own websites and social media accounts which include Facebook and Instagram. They also do PR through regular mail, as well as emails.
- Parents and students in Belgium mainly receive information about educational opportunities through dedicated events called "open-house days", where parents and students have the opportunity to see for themselves what courses, teachers, and study method a specific university has to offer. They also receive brochures and see advertisements on the internet, through both social media and email.
- To attract the largest possible number of Belgian students, it is recommended for U.S. study state consortia and/or educational institutions to use social media platforms like LinkedIn in their digital outreach strategies, as well as social media, most importantly Facebook and Instagram, which students use on a regular basis.

## EVENTS

- Antwerp XL (28-30 November 2023): <https://www.antwerpxl.com/>
- School Education Transformation Technology Namur (SETT Namur) (January-25-26 2024): <https://www.sett-namur.be/>

## RESOURCES

- U.S. Commercial Service – Belgium: <https://www.trade.gov/belgium>
- Fulbright Commission Belgium: <https://www.fulbright.be/study-in-the-usa/>
- American University Brussels: <https://www.american.edu/aubrussels/>
- AmCham Belgium: <https://amcham.be/>
- EducationUSA Belgium and Luxembourg: <http://www.educationusa.be/>

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# BRAZIL

<b>Capital:</b>	Brasilia
<b>Population:</b>	218.6 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$3.12 trillion (2021 est., in 2017 dollars)
<b>Currency:</b>	Reals (BRL)
<b>Language:</b>	Portuguese

## UNESCO Student Mobility Number:

Brazil has 89,151 students studying abroad according to UNESCO.

## CIA World Factbook:

37.17% of the Brazilian population is under 25 years old.

## OVERVIEW

Despite the economic and political challenges, Brazil remains the largest higher education market in Latin America, with education expenditure for 2022 reaching approximately US\$ 24 billion. The Brazilian Ministry of Education's budget for 2023 is projected to be \$29 billion.

Brazil has 46.7 million students in its basic education system, with 8.3 million in preschool, 26.5 million in elementary school, and 7.7 million in high school. The higher education sector includes 8.4 million enrolled students and there are 4.1 million students in other modalities, such as adult education. Approximately 75 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 bilateral agreements have existed for decades with various countries in Europe, North America, and Latin America. Available English language courses at Brazilian universities are still limited but growing.

In contrast to primary education, higher education in Brazil is dominated by private institutions. 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 the Brazilian Association of Higher Education Maintainers (ABMES), expect that despite the challenging economic/political situation, the education sector in Brazil will continue to grow, particularly the distance-learning segment. Lower monthly tuition fees for distance-learning are expected to increase higher education enrollment and the Brazilian Association of Distance Learning (ABED) estimates that there are approximately 355 institutions that currently offer distance-learning classes. For the first time in 2023, the number of registrations for distance learning will surpass the presential courses.

## SUB-SECTORS

### Higher Education

Brazil ranks eighth as a country of origin for foreign students studying at U.S. universities. During the 2021-2022 academic year, 14,897 students from Brazil were studying in the United States. The breakdown was as follows: 49.3 percent undergraduate; 31.9 percent graduate students; 4.2 percent other (language, short-term non-degree programs, etc.); and 14.6 percent OPT (Optional Practical Training).

Non-automatic recognition of foreign university credits toward earning a degree in Brazil is a barrier to U.S. education service exports. The Ministry of Education is in the initial stages of populating a system called "Plataforma Carolina Bori" which processes all validation requests for undergraduate and graduate degrees. Although this portal aims to accelerate the validation process by establishing precedents, it is still in the early phases of development.

Despite the bureaucratic challenges of having U.S. degrees recognized in Brazil, the number of Brazilian students choosing U.S. education is significant. Brazilian students in U.S. colleges and universities contributed \$620 million to the U.S. economy during the 2021-2022 academic year. Approximately 80 percent of Brazilian students who study abroad come from Brazil's southern and central eastern states (São Paulo, Rio de Janeiro, Brasília, Minas Gerais, Pernambuco, Rio Grande do Sul, and Paraná). Among these states (each of which presents excellent opportunities for overseas recruitment), São Paulo, Rio de Janeiro, and Brasília represent the three best locations to recruit Brazilian students to study in the United States. São Paulo has the largest applicant pool (36 percent) and attracts the most talented students to its own university campuses. The capital city of Brasília (11.6 percent) located in Distrito Federal (Federal District) has the country's highest GDP per capita at approximately USD \$16,500, over twice that of São Paulo, the region with the second-highest GDP per capita. The state of Rio de Janeiro (13.3 percent), the country's hub for the oil and gas industry, attracts many engineering and science majors.

### Community College

Community colleges are very popular amongst Brazilian students due to more affordable tuition rates and the possibility to transfer to a U.S. university.

### Graduate Education

Graduate education, especially in the areas of executive/business education has shown a slight increase in demand.

### Secondary Education

Despite the higher cost, the demand for boarding schools in Brazil continues to increase among parents. However, day schools with a family stay are also in demand among students with a lower budget. Parents will send their children for a semester or up to a year. Summer camps are also very attractive as an alternative to a long-term program.

## 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 such “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 for short-term and part-time programs. Examples of exchange programs currently popular in Brazil include part-time study programs combined with tourism and outdoor sports, teen vacation (specifically for teenagers with a mix of classes and leisure activities), and English language programs designed for 50+ year-old students.

U.S. schools interested in recruiting in Brazil should provide creative financing options, including options to pay in installments, since cost (along with proficiency in English language skills) will continue to be a challenge for Brazilian students studying abroad. Installment payments are widely popular throughout Brazil, from purchases of personal care products to larger purchases, such as computers.

## Online Programs

During 2021, the demand for online programs significantly increased. However, for a student’s first international experience, online programs are not as attractive because the student wants to experience the local culture and living abroad. For more experienced students, perhaps those doing international study for a second time, it may be more attractive. The hybrid option seems to have potential to be explored in the coming years.

## Education Technology

EdTech is a growing market in Brazil. According to the Brazilian Association of Startups (ABSTARTUPS), there are approximately 566 EdTech startups in Brazil. Sao Paulo is the leading city for the Brazilian EdTech industry, with a focus on the domestic market. A large portion of EdTech companies is in the Southwest region (58%) most of those located 37.8% in the State of Sao Paulo. The SaaS business model is utilized by half of the Brazilian Edtechs.

## OPPORTUNITIES

For the next decade, the fastest growing segment of the education market in Brazil will be short-term vocational and English language courses. The government of Brazil is investing in technical schools to provide courses for high school students and adults.

## DIGITAL MARKETING STRATEGIES

In Brazil, digital marketing is effective. With a predominantly young population, social media is very popular. The most popular platforms for online learning are Plurall, Samba Tech/Samba

Play, Udemy, Hotmart, Coursera, UOL Educação, Cia Tech, Portal Educação, and Prime Cursos. As far as social media, the most popular platforms for students are Instagram, YouTube, and TikTok. For research purposes, students use the Internet in general and Google, in particular. LinkedIn is the most famous job search app. For videos, Netflix, Amazon, and YouTube are the most used by students. Schools’ outreach to students is done via Google ads, Instagram ads, Facebook ads, email, and LinkedIn ads. U.S. institutions should find an education recruitment agent who can use their social media pages to showcase their partner schools and/or contract an education marketing agency to prepare a recruitment strategy for them.

## EVENTS

Education fairs and the use of recruitment agents are 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 takes place during the first semester of the year and the EducationUSA Fair during the second semester. Universities interested in participating and exhibiting at the Fairs should contact the EducationUSA office in Brazil. Please check each event regularly, as they may switch to a virtual format.

**Study Travel** - ALPHE Conferences –March 15-17, 2023 – Sao Paulo – The Conference creates an environment for networking between international educators and student recruitment agents.

**FAUBAI Conference** – April 15-19, 2023 – Belo Horizonte – 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 9-12, 2023 – São Paulo – This show is the best annual opportunity to exhibit classroom technology and furniture in Brazil. The main objective of Bett Brasil Educar is to create an environment for networking, business, and presenting solutions to improve the quality of Brazilian education.

**ICEF** - September 14-16, 2023 – São Paulo – This workshop provides an opportunity for international educators from all sectors to solidify 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

- U.S. Commercial Service – Brazil: <https://www.trade.gov/brazil>
- EducationUSA Brazil: <https://www.educationusa.org.br/>

### Government of Brazil

- Brazilian Ministry of Education: <https://www.mec.gov.br/>
- Language without Borders: <http://isf.mec.gov.br/>
- FNDE: <https://www.gov.br/fnde/pt-br>



## Other

- Belta – Brazilian Educational and Language Travel Association: <https://www.belta.org.br/>
- WENR– World Education News + Reviews: <https://wenr.wes.org/>
- INEP – Instituto Nacional de Pesquisas Educacionais Anísio Teixeira: <https://www.gov.br/inep/pt-br>

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# BULGARIA

<b>Capital:</b>	Sofia
<b>Population:</b>	6.8 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$167.8 billion (2021 est., in 2017 dollars)
<b>Currency:</b>	Leva (BGN)
<b>Language:</b>	Bulgarian

## UNESCO Student Mobility Number:

Bulgaria has 25,185 students studying abroad according to UNESCO

## CIA World Factbook:

23.92% of the population in Bulgaria is under 25 years old.

## OVERVIEW

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

According to the latest data from Eurostat, the Bulgarian government expenditure on education is 4.1% of GDP. Education costs in Bulgaria are one of the lowest in the EU as only EUR 250 (approx. \$286) are spent per inhabitant, on average.

As a member of the European Union since 2007, Bulgaria benefits from various programs. Operational Program Education 2021 to 2027 helps to develop and strengthen innovations in higher and general education, as well as vocational training. The fund amount exceeds approximately \$890 million and is expected to advance the students' opportunities for knowledge, skills, and competencies by supporting laboratories and pilot centers, various activities, and scholarships. In addition, in February 2021, the Bulgarian council of ministers adopted the strategic framework for education and training for the period 2021-2030. It corresponds to the vision and general objectives of the National Development Program Bulgaria 2030 and outlines the main principles and priorities for the development of education and training in Bulgaria.

## SUB-SECTORS

### Higher Education

The 2022 IIE Open Doors Report showed that the number of Bulgarian students in the U.S. decreased by 9.1% over the last academic year, from 585 students during the 2020-2021 academic year to 532 students in the 2021-2022 academic year.

The only U.S. university in the country — the American University in Bulgaria (AUBG) – is in two cities, Blagoevgrad and the capital, 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 communications programs. AUBG has approximately 1,000 students. In 2017, AUBG started the first Executive Master’s program in banking, finance, and real estate at its campus in Sofia, as a joint venture program in cooperation with the SDA School of Business, Bocconi University in Italy.

AUBG has an active international student exchange program and currently has an agreement with The University of Maine, in Orono, Maine for semester- and year-long programs. Incoming students must be enrolled at the University of Maine, Orono, Maine or the State University of New York, Fredonia, New York. The academic credits are recognized in Europe and in the U.S.

In 2023 another dual Executive MBA program will start in Bulgaria in a partnership between the Northern Illinois University and the University of National and World Economy in Sofia.

Colleges: There are a total of 54 higher education institutions in Bulgaria. 22 out of the 54 are colleges for professional education in sectors such as tourism, business and management, and marketing. College education in Bulgaria lasts approximately three years, and some institutions provide diplomas that are equivalent to a university degree.

### Secondary Education

Another established American education institution in Bulgaria is The American College of Sofia (ACS), a secondary school based in the capital, Sofia. The college was founded in 1860 and is one of the oldest U.S. education institutions outside the United States. Every year, ACS students score the highest results in the final state exam.

Since 2018, a new trend in secondary education in Bulgaria is distance learning. American High School in Varna partners with a Florida-based school to provide an online program that gives Bulgarian students the opportunity to earn a U.S. Diploma by taking the courses required by the State of Florida’s Education Department. When enrolled in the American High School program, the students can 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 willing to study abroad are proficient in English and are usually very well-prepared academically, which facilitates their learning experience abroad. About 98% of high school students study a foreign language (usually English) and 73% study a second language (mainly German, French, Spanish, Russian).

In Bulgaria, there are many public schools that are fully licensed for teaching in the English language. There are 42 foreign language schools in the country (mostly English language schools plus other foreign languages). Examples are First English Language School and Secondary English Language School, “Thomas Jefferson” based in Sofia, and the English Language School in the town of Plovdiv. In these high schools, the students’ first year is fully focused on intensive English language study. Grades 9 to 12 study almost every subject in English and have an option to learn a second language (German, Spanish, Russian). Most of the graduating students prefer to continue their studies abroad.

### Online Programs

Online programs were not popular in Bulgaria until 2020. Leading universities, such as Sofia University, Varna University, and New Bulgarian University already provided various online education programs. Traditionally, online programs have been an alternative for many students with full-time jobs. The prices for these programs vary from \$700 to \$5,000 per year.

Due to the Covid-19 pandemic, schools and universities in Bulgaria were forced to have classes online. Preferred online platforms include Microsoft Teams, Zoom, Shkolo, Moodle, Ucha.se, and Google Classroom. Of these, Shkolo and Ucha.se are Bulgarian online platforms. Shkolo (<https://www.shkolo.bg/>) is used by 70% of the schools in the country, and it was developed in March 2020. Ucha.se (<https://ucha.se/>) has more than 16,000 video lessons. DOX.bg, Microsoft Teams, Google Classroom, Zoom, and Moodle are mostly used by Bulgarian universities.

Two of the biggest publishing houses in the country announced that they would guarantee free access to the electronic versions of all textbooks they publish for grades 1-12. Electronic diaries, email, and social media are also used in order to provide students with instructions on how to better prepare their e-learning activities and homework exercises.

A1, which is one of the leading providers of digital services and telecommunications solutions in Bulgaria, teamed up with Prosveta Publishing House to give Bulgarian students, parents, and teachers fast, convenient, and secure access to modern digital education. They offer over 425 interactive textbooks covering all subjects from first to 12th grade, as well as manuals, dozens of notebooks, and over 33,000 additional resources to help the student, teacher, and parent, including videos, audio files, presentations, photo galleries, 360-degree panoramic photos, animations, puzzles, crosswords and 3D visualizations, interactive tests, and tasks and exercises. Prosveta also offers hundreds of video tutorials on the curriculum and tests for testing knowledge.

During the Covid-19 pandemic, U.S. Ivy League universities have offered 500 classes that students could take online to improve their knowledge on different topics. Many Bulgarian students took advantage of this unique opportunity.

### Research and Development

Another EU funded program, in addition to the Operational Program, is the 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 private businesses in Bulgaria. In 2015, 0.96 % of GDP was spent for R&D, less than 0.4% from public spending. The goal of the Horizon 2020 program is for R&D investment to reach 1.50% of GDP by 2020, equally shared by government and business.

In the new seven-year EU budget framework, Bulgaria is set to receive around \$33.2 billion. The sum is also meant to help with the recovery from Covid-19. Bulgaria is able to apply for an additional \$237.3 million for its underdeveloped regions.

The Ministry of Education and Science and the European Institute of Innovation and Technology signed a Memorandum of Understanding (MOU) to support the development of innovation

through education in natural sciences, digital technologies, engineering, and mathematics (STEM) to shape the skills of the future and prepare future generations to be successful in their careers. The activities in implementation of the MOU will support Bulgaria's more active participation in the Framework Program, as well as in the "Horizon Europe" program in the future, the most ambitious program for research and innovation in the European Union. In 2020, Bulgaria applied for funds from "React EU" to buy at least 80,000 tablets, 20,000 for teachers and a minimum of 60,000 for students. They were distributed for e-learning purposes only and will guarantee access to education for those who do not have the opportunity to acquire their own devices.

Following Russia's invasion of Ukraine on February 24th, 2022, Bulgaria announced that its education system will be able to absorb some 20,000 Ukrainian learners. Since the beginning of March 2022 Prosveta, an online publisher, has been offering free educational books and textbooks for all children fleeing the war in Ukraine who enroll in Bulgarian kindergartens or schools. According to UNESCO for 2021/2022 academic year Bulgaria has accepted 1,197 students from Ukraine in the national university system.

## OPPORTUNITIES

The best prospects for Bulgarians to study in the U.S. include intensive English language training programs (e.g. summer programs for both students and adults); programs in business administration; Work, study, and travel programs (around 5,500 Bulgarian students participated in 2019); e-learning; and undergraduate and graduate degrees.

There is an increased demand for exchange summer programs with various private Universities in EU (thru different educational programs), UK and USA. Bulgarian universities could provide excellent support for US universities Study Abroad programs seeking semesters or courses taken abroad.

Summer courses in the U.S. and year-round online courses could present good opportunities for U.S. universities and schools looking to attract Bulgarian students. Summer English language programs are suitable for local students and fit well with Bulgaria's semester structure. Distance learning courses and e-learning are getting more popular among younger generation students. Educational consulting agencies in Bulgaria provide great assistance to Bulgarians who plan to study abroad. The opportunities for students are numerous, from attending boarding school or pursuing an undergraduate degree, to seeking internship opportunities abroad. These consulting agencies inform students about requirements and documentation, while facilitating the study abroad process. They include such entities as Integral Educational Programs Ltd., Darbi ESH Study Abroad, Orange Education, Skylines Ltd. SRT, Edlanta Education Abroad, Miotrade/Edumarket, and more.

The Fulbright program offers grants for Bulgarian graduate students (Ma, PhD), research programs for doctoral scholars, grants and fellowships for professionals, and scholarships for members of NGOs. Students and young professionals are given the opportunity to increase mutual understanding between the people of the United States and their own culture.

To assist U.S. universities in promoting their programs to Southeast European (SEE) countries, the U.S. Commercial Service in Bulgaria supported and organized five regional Virtual Educational Fairs (VEFs) in 2015, 2016, 2018, 2019, and in 2020, in cooperation with the U.S. Commercial Service offices or U.S. Embassies in Albania, Greece, Romania, Serbia, and Slovenia. These VEFs

attracted over 120 educational consultants, universities representatives, and college counselors from the SEE region.

The U.S. Commercial Service Sofia also participated in various virtual matchmaking and business consulting Educator to Educator programs; U.S. Department of Commerce global education programs - USA: A Study Destination; various introductory services for U.S. universities and presented the SEE region at the leading education conference in USA – NAFSA 2022.

## EVENTS

World Education Fair  
Sofia, Bulgaria  
March 25-28, 2023 / October 7-8, 2023  
<https://www.iwef.eu/?market=1#e>

## RESOURCES

- U.S. Commercial Service – Bulgaria: <https://www.trade.gov/bulgaria>
- 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>
- Horizon 2020: <http://horizon2020.mon.bg/en>
- American University in Bulgaria: <https://www.aubg.edu/>
- UNESCO: <https://www.unesco.org/en/articles/bulgarias-education-response-influx-ukrainian-students>
- Eurostat: [https://commission.europa.eu/index\\_en](https://commission.europa.eu/index_en)

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# CENTRAL AMERICA

## Number of students studying abroad per UNESCO Student Mobility Statistics:

Belize	894
Costa Rica	3,675
El Salvador	4,536
Guatemala	3,354
Honduras	4,888
Nicaragua	3,664

## Percent of population under 25 years of age per CIA World Factbook:

Belize	51.57%
Costa Rica	37.27%
El Salvador	44.65%
Guatemala	53.44%
Honduras	51.23%
Nicaragua	45.14%

## 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 7,115 during the 2021/22 academic year, representing an 8.15% increase over the previous year. Among the top receiving states are Texas, Florida, Massachusetts, California, New York, Maryland, Virginia, Pennsylvania, Georgia, and Louisiana.

## Number of international students per country and academic level:

Place of Origin	Academic Year 2021/2022	Undergraduate	Graduate	Non-degree	OPT
Belize	388	209	112	6	61
Costa Rica	1,315	611	447	40	217
El Salvador	1,445	1,027	239	42	137
Guatemala	1,228	718	296	36	178
Honduras	2,186	1,323	501	65	297
Nicaragua	553	328	136	17	72
<b>TOTAL</b>	<b>7,115</b>	<b>4,216</b>	<b>1,731</b>	<b>206</b>	<b>962</b>

Source: 2022 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-term 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. Other countries of destination for students from the Central American region are Spain, Argentina, France, Canada, Korea, China, and Germany.

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 for becoming a bilingual country, it is ranked #37 in the 2022 EF EPI English Proficiency Index (which evaluates the English language skills of 100 countries worldwide), followed by Honduras in position 48, El Salvador at 50, Guatemala at 58, and Nicaragua at 61.

## SUB-SECTORS

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

- Universities and community colleges with tuition fees lower than \$20,000 per year
- English language programs (from one month to one year) for students, teachers, and adults
- Summer camps
- Undergraduate, graduate, and master's degree programs
- Online programs

During the 2021/2022 academic year, El Salvador and Honduras ranked 18th and 22nd, respectively, among the top 25 places of origin for international students attending community colleges.

Among the top fields of study and majors are business and management, engineering, math and computer science, physical and life science, and social sciences.

## OPPORTUNITIES

The COVID-19 pandemic created new opportunities in the education sector for virtual education programs. One of the main challenges for the governments of each country is access to the Internet and the lack of availability of computers for each student.

The "100,000 Strong in the Americas" initiative represents an opportunity to increase the number

of exchange students between Central America and the United States. All U.S. Embassies, U.S. Commercial Service offices, and EducationUSA offices in the region are committed to increasing 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.

In August 2017, Honduras launched the Presidential Scholarship Program “Honduras 20/20”, a robust financial aid initiative with a defined structure to promote the education and professional development of young Hondurans. This program aims to support graduate education abroad for students with academic excellence. The program gives priority to key areas under the country’s economic development strategy to generate new jobs and sharply boost exports. These sectors include the textiles, manufacturing, tourism, and business services sectors. Several agreements have already been signed with prestigious universities from Spain, Costa Rica, and the Organizations of American States, and the Presidential Program is seeking to establish alliances with U.S. higher education institutions to enhance professional and technical skills and student development through specialized training.

In addition, Costa Rica has available funds for five grants of \$40,000 each through the CRUSA foundation- a private, independent, non-profit organization in the country. The grants are intended to cover expenses for community college education in the U.S. for students interested in starting a STEM career. In Costa Rica, dealing with public institutions requires time and dedication. Public universities have the best rankings in the country and the highest demand from students, and rarely promote study abroad programs. On the other hand, private universities are always looking for partnerships and cooperation with foreign institutions, and once they sign an agreement with a foreign institution, the agreement is commonly used as a marketing and branding strategy. Texas Tech University established a campus in San Jose in 2020, which offers a 100% English learning environment, something brand new for the market, and in-demand diplomas in STEM, business, and hospitality.

In El Salvador, private universities are focusing on alliances and agreements with foreign schools for joint programs, exchanges with students and professors, dual certification, and recognition of credits.

To enter the Central American 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 and 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 process.
- Describe opportunities for scholarships and financial aid.
- Provide information on the process to obtain a U.S. student visa.

It is recommended that all marketing materials and program information be available in Spanish.

## DIGITAL MARKETING STRATEGIES

The use of digital marketing strategies and social media are key elements to equip the Education field with unlimited access to online communication and information. Since all teachers and students were forced to transition to home schooling due to the unexpected Covid-19 situation, the use of digital platforms has significantly increased during 2021 and 2022.

There are different platforms preferred by Central American students, depending on the activity or information desired. Below is a list of preferred platforms in the region.

- For virtual classes: Google Classroom, Microsoft Teams, Zoom, and Google Meet.
- Social media: WhatsApp, Instagram, YouTube, and Facebook.
- Research: Google search engine
- Streaming videos: YouTube, Instagram, TikTok
- For one-on-one quick meetings: WhatsApp

It is important for U.S. higher education institutions to share information with both students and parents, as the latter will be part of the decision-making process. Information is usually shared by email or during an education fair. Recently, WhatsApp has started being used by students, parents, and school representatives to send information or conduct video calls. Finally, when a student is ready to enter the labor market, they seek job opportunities through job fairs, direct recommendations of a professor or Dean, headhunting websites, or LinkedIn.

Competitor countries usually promote their programs through participation in education fairs or paid advertisements on Facebook and Instagram. It is recommended that U.S. higher education institutions and U.S. study state consortia replicate this practice and work closely with the U.S. Commercial Service and/or EducationUSA. The inclusion of short testimonial videos in Spanish in marketing materials is highly recommended.

## EVENTS

For country-specific events and activities, please reach out to the U.S. Commercial Service contacts below.

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## CHINA

**Capital:** Beijing  
**Population:** 1.4 billion (2023 est.)  
**GDP (Purchasing Power Parity):** \$24.8 trillion (2021 est., in 2017 dollars)  
**Currency:** Renminbi Yuan (RMB)  
**Language:** Standard Chinese or Mandarin

### UNESCO Student Mobility Number

China has 1,088,466 students studying abroad according to UNESCO.

### CIA World Factbook

28.77% of China's population is under 25 years of age.

### OVERVIEW

China has the largest state-run education system in the world, with 291 million students and 18 million teachers in over 529,000 schools in 2021 (The Ministry of Education). Its quality has improved considerably over the last decade due to continuous reforms and large-scale investments.

The Ministry of Education of the People's Republic of China is the agency of the State Council that oversees education throughout the country. In 2019, the State Council issued a blueprint for the country's education development for the coming decade, called China's Education Modernization 2035. This plan sets the objective of establishing a modern education system with universal quality pre-school education, balanced compulsory education (grades 1-9), enhanced vocational education, and more competitive higher education.

### SUB-SECTORS

#### K-12 Education

China has the world's largest K-12 education market. In 2019, there were 106 million elementary (grades 1-6) students, 48 million junior middle school (grades 7-9) students, and 40 million high school students (grades 10-12), which together created a market of approximately \$120 billion. Additionally, China reported 47 million kindergarten students (3-5 years old) in 2019, a group excluded from China's K-12 market definition, but which has demonstrated strong demand for international products and services.<sup>1</sup>

China's regulations commonly categorize K-12 education service providers as either non-profit or for-profit. Non-profit entities are mainly schools that provide full-time curricular education. For-profit entities include private schools, academic extracurricular tutoring, and non-academic extracurricular tutoring.

The K-12 education market has grown rapidly in recently years, and in so doing, raised social anxiety among parents and students seeking to gain an edge. Early in 2021, China's central government enacted tough rules meant to ease pressure on school children and financial

pressure on families by regulating and restricting the private tutoring market. One example is the clampdown on the for-profit curricular tutoring industry<sup>2</sup> from July 24, 2021, which was touted as a measure to reduce the time and financial burden of out-of-school training on students through grade 9 and their families (<http://politics.people.com.cn/n1/2021/0725/c1001-32168735.html>). This policy affects both online and offline tutoring service providers.

### Higher Education

China remains the largest source of international students in the United States for the 13th consecutive year, according to the Institute of International Educational Exchange's 2022 Open Doors Report. The United States welcomed 290,086 Chinese students in the 2021/22 academic year. This figure decreased 8.6% when compared to the previous school year.

China's current COVID-19 pandemic control policies have caused testing center closures, increasing the uncertainty and difficulty for students to take standardized tests (SAT/ACT/TOEFL/IELTS). This has impacted high school students' application processes for U.S. schools, especially for students who desire entry to top American universities.

### Undergraduate and Graduate Programs

109,492 Chinese students were enrolled in U.S. undergraduate programs and 123,182 in U.S. master's and doctoral programs in the 2021-2022 school year. The number of undergraduates decreased 12.8% from the previous year, and the number of graduate students increased by 3.6%.

"Over time, the data has been pretty consistent, independent of the state of relationships or political tensions," said Dr Allan Goodman, CEO of the Institute of International Education. "Education operates in a different space, and we expect that to continue in respect to China, no matter what the temperature is."

### Community College Programs and Vocational Schools

In the government's China Education Modernization 2035 plan, one of the six key points is to significantly improve vocational education in China, which creates new opportunities for U.S. community colleges. In pursuit of this plan, China is building the world's largest vocational education system to tackle this aging country's labor shortage problem. Vocational schools are gaining increased government support and seeking international cooperation in vocational education and career development. On the other hand, parents and students at vocational schools remain inclined to higher academic degree programs. U.S. community colleges' vocational programs and transfer programs can meet both needs. Such programs typically have fewer prerequisites for admission, have more affordable tuition and fees, and offer credits recognized by four-year universities in the United States.

### Education Technology

2022 was a challenging year for the education sector in China. Apart from the global pandemic, the Education industry also experienced local regulatory changes in China's private after-school tutoring sector. The long-term impact of COVID-19 on education in the China market is expected to lead to an increase in spending on digital infrastructure and new digital models utilizing the

new tools available in digital education. Both international students and domestic students have had to adjust their ways of studying by adapting to online learning on various technology platforms.

As there is still strong demand from the education industry and the support from relevant national policies, the total revenue of China's education technology market continues to rise, and the scale is expected to reach \$75 billion by the end of 2022. However, due to the industry's high demand for service experience, professional technical services, solid sales channels and other factors, small enterprises and new entrants also face high industry barriers. China's education technology market has entered a stage of rapid growth from 2017 to 2020, with the total revenue of the industry increasing from \$46.4 billion to \$61.1 billion, with a compound annual growth rate of 9.6%. In 2020, due to the COVID-19 outbreak, the growth rate from 2019 to 2020 was lower than in previous years and still showed an increasing trend.

(Reference: <https://www.163.com/dy/article/H745J17M0514810F.html>)

### Education Technology trends

Hardware equipment sales are the largest component of China's education informatization market, accounting for 39% of revenue in 2020; it was followed by integrated IT solutions and software services, accounting for 28.1% and 26.4% respectively in 2020.

- Integrated IT solution providers in the education information market are mainly engaged in integrating hardware and software products and bundling their integrated IT solution services to customers in several regions. **STEAM learning** continues to be a major priority for the Chinese market. The demand for STEAM education and training has seen the booming creation of training programs and startups offering out-of-school courses in coding, robotics, and 3-D printing and attracted the attention of publishers, toymakers, and app developers.
- Formative methods are supplanting traditional, summative approaches (especially regarding test taking) resulting in more EdTech firms with solutions that focus on formative assessments.
- The mobile education texting-for-homework-help/crowdsourcing market has expanded to include a handful of firms that have developed crowdsourcing apps/web platforms to allow students to answer each other's questions or to engage quickly with a teacher/expert for help.
- School management systems.

### Challenges

- The biggest challenge for U.S. EdTech firms is localization. Many firms have created education technology to specific curriculum and U.S. state standards. To adapt their technology to a specific market, whether it be language, standards, curriculum, etc., will increase costs.
- Finding the right local partner is an important multiplier to market exposure. Other ways to gain awareness in the marketplace is through e-commerce or targeting private schools and parents.
- Startups in the EdTech sector face a unique challenge in marketing their products worldwide on a limited budget.

- Sales channels can take years to carefully cultivate leading to established well-known brands in the regions in which they operate and established strong relationships with educational institutions. New entrants cannot establish a good brand image and establish good relationships with local institutions in a short period of time.

## OPPORTUNITIES

### K-12 Education

There remains enormous demand for better education and supplemental learning as both parents and schools seek a competitive edge for their students. Large players might shift their business focus to new frontiers like extracurricular tutoring and vocational education, both of which were not impacted by the above-mentioned regulatory changes. These and other opportunities are:

1. *Non-academic extracurricular programs that offer all-around education:* Such programs are exempted from the government's recent policy changes and include subjects such as art, computer coding, sports, music, and others. Chinese parents' strong belief in personal education investment remains unchanged, especially among those families interested in an overseas college education.
2. *Academic and non-academic pre-college enrichment programs for high school students:* China's tough measures on education have had, and will continue to have, large effects on the nine-year compulsory education (grades 1-9) market, yet barely impact high schools. High school students who intend to study abroad are eager to get more prepared through these types of courses. Chinese domestic leaders in this segment, like GEC Academy, reported soaring sales of international enrichment courses in 2020. Market demand is expected to continue to grow even after COVID travel restrictions are eased.
3. *Boarding schools:* U.S. boarding schools remain appealing to Chinese parents and the U.S. Commercial Service in China (CS China) expects interest to rise as routine international travel resumes. Up until COVID restrictions made travel difficult or impossible, we noted increased interest in boarding schools for the lower grades in addition to high schools, which previously were the most popular options pursued by Chinese families.
4. *Educational toys and games:* Providers of educational toys and games may see the opportunity to emerge as replacements to academic tutoring. Opportunities exist for both physical products and online learning in the form of websites, software, or apps.
5. *Language training:* Academic language training providers might find it difficult to operate in China, while those who provide programs designed to enhance reading ability, without being specifically designed to tutor speaking, may find opportunities.

### Higher Education

In 2020, there were nearly 400,000 children enrolled in English-medium international schools. The number of international schools in China continues to grow, with 53 international schools operating, 75% of them in lower-tier cities. Unlike students within the public education system, most of those enrolled in international schools choose to study abroad after graduation. International schools have been and will continue to be important recruiting channels for U.S. higher education institutions.

Statistics show that in 2021, 3.8 million people, both recent college graduates and working professionals, took the postgraduate entrance exam in China, an increase of 11% over the previous year. With an admission rate of only 35%, nearly 2.5 million cannot enter graduate school and represent a pool of potential candidates who are seeking to further improve their academic qualifications. Many of them are financially well prepared.<sup>3</sup>

Based on research by Sea Master Education, the market for online master's degree programs is booming. The flexibility of online learning is appealing to the population between 25- and 45-years old who are unable to study abroad due to the cost of lost job opportunities and for family reasons. We have also noticed a growing number of U.S. universities launching online master's degree programs in China.<sup>4</sup>

### Vocational Education and Community College

China's central government encourages international cooperation and exchanges for vocational education. China has sent delegations to learn from the countries where vocational education is well-developed, received foreign vocational education delegations, invited foreign experts on the topic to give lectures in China, and created partnerships with foreign vocational education institutions. China also works with international organizations, such as UNESCO, UNDP, the World Labor Organization, UNPF, and APEC, to promote vocational education.

U.S. community colleges and vocational schools hoping to recruit students from China should focus on the unique experiences they offer to students. These can include proximity to major cities, ease of transportation, proximity to natural resources, and unique student community groups.

To further establish an exceptional value – and to provide differentiation in a very crowded market – community colleges and vocational schools should highlight feeder programs and partnerships with higher-level and highly-ranked universities. Community colleges and vocational schools should also highlight the unique features of their training programs. Corporate partnerships, apprenticeships, and internship programs are important features to highlight to help schools stand out.

## DIGITAL MARKETING STRATEGIES

With regards to social media and digital platforms, local Chinese sites and search engines are most popular in-country. For example, students regularly use TikTok, Bilibili, Weibo, QQ, and WeChat. The most popular social media sites are Bilibili, TikTok, and Weibo. Baidu is most used to research information, and Zhipin, LinkedIn, Douban, and 51job are used by students to search for job opportunities. To stream videos, students use Tencent, Aiqiyi, and Youku.

In-country schools and schools from competitor countries use TikTok, Bilibili, Weibo, QQ, WeChat, Tencent, Aiqiyi, and Youku to reach students and parents about education opportunities.

The U.S. Commercial Service in China recommends that U.S. study state consortia and/or education institutions communicate their unique offerings and experiences to differentiate themselves from competitors, identify champions to provide testimonials and drive digital marketing, and seek best practices from peer institutions, especially those that have successful



marketing experience in China. The champions to provide testimonials can be current students or alumni from China.

## EVENTS

- China Education Expo 2023,
- Global Education Technology Summit & Expo 2023
- International Education Equipment Expo 2023
- Global Smart Education Conference 2023

## RESOURCES

- U.S. Commercial Service – China: <https://www.trade.gov/china>
- Ministry of Education of the People's Republic of China: <http://www.cacie.cn/>  
China Education Association for International Exchange: <http://en.ceaie.edu.cn/>

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<sup>1</sup> Ministry of Education of the People's Republic of China <http://www.moe.gov.cn/>

<sup>2</sup> <http://politics.people.com.cn/n1/2021/0725/c1001-32168735.html>

<sup>3</sup> <http://en.moe.gov.cn/documents/statistics>

<sup>4</sup> <https://www.seamastereducation.com/>



# COLOMBIA

<b>Capital:</b>	Bogota
<b>Population:</b>	49.3 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$754.6 billion (2021 est., in 2017 dollars)
<b>Currency:</b>	Colombian Pesos (COP)
<b>Language:</b>	Spanish

## UNESCO Student Mobility Number:

Colombia has 56,910 students studying abroad according to UNESCO.

## CIA World Factbook:

39.65% of the Colombian population is under 25 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, the most notable being: increased employment opportunities after graduation; the high quality of education; the opportunity 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 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 most in-demand fields of study are those focused on: business administration, management, finance, banking, marketing, and engineering.

According to the Institute of International Education, during the 2021-2022 academic year, Colombia ranked 20<sup>th</sup> in the world and 2<sup>nd</sup> among South American countries, after Brazil, in sending students to the United States.

The COVID-19 pandemic has substantially impacted Colombian education. The Colombian government was forced to close schools, leading more than nine million students to learn from home. Additionally, the Colombian economy suffered as well, leading to a reduction in the number of students studying abroad.

## SUB-SECTORS

### Colombian Student Enrollment in the United States

Colombian Student Enrollment in the United States by Academic Year				
Indicator	2018/19	2019/20	2020/21	2021/22
Number of Colombian Students	8,060	7,787	7,107	8,077
Change from Previous Year	1.1%	-3.4%	-8.7%	13.6%

Academic Level	2020/21	2021/22	% Total	% Change
Undergraduate	2,660	2,827	35.1	6.3
Graduate	2,847	3,514	43.5	23.4
Non-Degree	326	514	6.3	57.7
OPT	1,274	1,222	15.1	-4.1

Source: IIE Open Doors 2022

Based on the data, Colombian students in U.S. colleges and universities contributed nearly USD 345 million to the U.S. economy in the 2021/22 academic year.

Additionally, 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, as well as various micro scholarships for English Language studies.

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. Under government-to-government and 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 EducationUSA 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 is higher compared with other countries. 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 graduate degree. Moreover, a degree from a U.S. university can serve to make job applicants that much more competitive in the Colombian workplace.

Most scholarships are awarded through two institutions, the Colombian Institute for Educational Loans and Technical Studies Abroad (ICETEX by its initials in Spanish) and COLFUTURO. ICETEX

is dedicated to financing higher education through a system of financial aid that allows students to start or continue their undergrad or graduate studies either in-country or abroad. In 2021, ICETEX approved 1,107 Colombian students for loans, and 891 obtained scholarships for master’s degrees, Ph.D., and ESL programs abroad.

The non-profit COLFUTURO provides funds to Colombian professionals and students to study abroad. In 2022, COLFUTURO awarded 1,534 loan-scholarships for master’s and Ph.D. programs, with 311 of those being for programs in the United States.

The second institution is COLFUTURO, 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. In 2022, COLFUTURO awarded 1,534 loan-scholarships for master’s and Ph.D. programs, with 311 of those 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, Texas Tech University (TTU), and Harvard University, among others.

## OPPORTUNITIES

Although COVID-19 has negatively affected the number of Colombian students abroad, the U.S. continues to be the first choice for students. However, one barrier to study in the U.S. is the exchange rate, which plays a major role in Colombian students’ decision to study in the United States. Despite this, demand and interest remain strong. International education is highly valued in the Colombian workplace, with a recent survey of Colombian employers finding that 58 percent preferred to hire people who had earned advanced degrees abroad.

For U.S. schools and ESL institutions, private and bilingual schools in Colombia offer great recruiting opportunities. Colombian 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.

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

At the higher education level, private universities also offer important recruitment opportunities for undergraduate and graduate 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 to prospective students looking to expand their opportunities abroad.

Additionally, Colombian universities are interested in dual degree programs with U.S. universities. 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 both American culture and American people, thus further strengthening cultural ties between the two countries.

There are numerous 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 EducationUSA centers administering language programs and doing extensive outreach throughout the country. EducationUSA centers are located at nine binational centers.

## EVENTS

Education fairs are one of the most effective ways to recruit Colombian students. Colombia generally has a few education fairs throughout the year. Additionally, EducationUSA 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 website-<http://www.educationusa.state.gov>.

## RESOURCES

- U.S. Commercial Service - Colombia: <https://www.trade.gov/colombia>
- Colombia Ministry of Education: <https://www.mineducacion.gov.co/portal/>
- Colombian Institute for Educational Loans and Technical Studies Abroad (ICETEX): <https://www.icetex.gov.co>
- COLFUTURO: <http://www.colfuturo.org>

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# CROATIA

<b>Capital:</b>	Zagreb
<b>Population:</b>	4.16 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$123.34 billion (2021 est., in 2017 dollars)
<b>Currency:</b>	Euro (EUR)
<b>Language:</b>	Croatian (official)

## UNESCO Student Mobility Number:

Croatia has 10,003 students studying abroad according to UNESCO.

## CIA World Factbook:

24.92% of the population in Croatia is under 25 years of age.

## OVERVIEW

As a European Union member, Croatia has an education system comparable to most systems in Europe, which includes pre-school education (kindergarten), basic education (elementary school), secondary, and higher education. Since 2003, Croatia has been involved in an intensive reform of its higher education system within the framework of the Bologna process, in line with its national needs and European Union standards. Education in Croatia is mainly provided by the public sector. Students have the right to free tuition, subsidized meals, and lower taxes during their studies. According to the Croatian Institute for Development of Education, the average TOEFL score in Croatia is 90, which puts Croatia in the top 25 countries in the world. Croatian students are highly interested in studying abroad and they research and consider all available options in the global education market. The Erasmus program is active in Croatia, allowing students to study abroad in other EU countries while remaining within European university system standards. The Fulbright exchange program is funding education programs between the United States and Croatia.

## SUB-SECTORS

### Higher Education

In the 2020-2021 school year, the total number of children and students enrolled in Croatia was 734,006.

In addition to the previously mentioned high English language proficiency, Croatian students who wish to study abroad are usually very well-prepared academically. Many Croatians seek and obtain athletic scholarships in the United States, including for more specialized sports such as volleyball, rowing, and soccer.

The United States is the fifth most popular destination for study abroad, behind Austria, Germany, the United Kingdom, and the Netherlands. The most popular destinations to study in the United States are California, New York, Texas, Massachusetts, and Illinois. According to the 2022 Open Doors data, there were 392 Croatian students studying in the United States in

academic year 2021-2022, a loss of one student from the previous year.

Croatia has a binary higher education system, meaning that prospective students can choose between the following types of higher education studies:

- University studies (consisting of academic programs conducted solely at universities, of which there are nine public and three private universities).
- Professional studies (consisting of professional programs conducted at polytechnics or colleges of applied sciences, of which there are eleven public and six private polytechnics).
- Professional higher education (consists of eighteen schools from which only three are public and fifteen private).

Since the introduction of the Bologna process, the levels of expertise are: Bachelor of Science and Bachelor of Arts, Master of Science and Master of Arts, Master of Education, Doctor of Science and Doctor of Arts.

### Undergraduate and Graduate Study

According to the Croatian Central Bureau of Statistics (2021), the total number of students enrolled in institutions of higher education in the Republic of Croatia in school year 2020-2021 (winter semester) was 155,627 (57.3% of them were women, 42.7% were men; 98.1% of them were citizens of the Republic of Croatia and 1.9% were foreign citizens). Out of the total number of students enrolled in institutions of higher education, 81.2% enrolled in faculties, 13% in polytechnics, 4.1% in schools of professional higher education, and 1.7% in art academies. The largest Croatian universities are the University of Zagreb (with 39.3% of all enrolled university students in Croatia in 2018), University of Split (16.1%), University of Osijek (13.8%), University of Rijeka (13.9%), and University of Zadar (3.4%). The only U.S. higher education institution in the country is Rochester Institute of Technology (RIT) Croatia.

Regarding scientific and artistic fields of studies, the most frequently chosen degree programs are Social Sciences (43.4%), followed by Engineering (25.9%), Biomedicine and Health (12%), Humanities (6.5%), Biotechnical sciences (4.7%), Natural sciences (3.9%), Artistic fields (2%), and Interdisciplinary fields of science (1.6%).

### Postgraduate Study

According to the Croatian Central Bureau of Statistics (2021), the total number of students enrolled in post-graduate specialist studies in the Republic of Croatia in the school year 2020-2021 was 1,429 (98% of them were citizens of the Republic of Croatia and 2% were foreign citizens).

### Lower Education Levels

- **Pre-school** education (kindergarten) is optional and provided for children three to six years of age. The total number of children enrolled in kindergarten in 2019-2020 was 139,682.
- **Primary/Elementary** education consists of eight years and is compulsory. Children begin school at the age of 6 or 7 years. The total number of pupils enrolled in elementary

schools in the school year 2020-2021 was 313,461. Grades earned during elementary school are the major admission criterion for most secondary schools.

- **Secondary/High School** education is currently optional and is comprised of high schools, mostly gymnasiums, and vocational schools. Most high schools take four years to complete the curriculum. The admission to comprehensive schools is based on grades from elementary school or scores on entry exams. Those who complete secondary school are classified as having "medium expertise". Total enrollment in secondary education during the 2020-2021 school year was 145,434.

### Online Programs

Online study is not popular in Croatia and there are only a few programs in the cities of Zagreb and Rijeka. Online study is not funded by the government, so students need to pay the full tuition fee. During the pandemic, students and pupils were rapidly introduced to online learning and perhaps this will help the sector to get more attention in the future. Neighboring countries have more developed programs; for example, Slovenia is offering online study programs in the Croatian language that are recognized in Croatia and the EU.

### OPPORTUNITIES

English is the first foreign language in the Croatian education system. Foreign language courses (English, German) are mandatory for almost all students in Croatia. Education abroad is becoming a key consideration for Croatian graduates seeking to succeed in the European Union's employment market or pursue further educational opportunities globally. Best prospects within this sector include graduate and post-graduate programs abroad, work and study programs, summer programs, and exchange programs.

Most of the academic degrees awarded by U.S. programs are acknowledged in Croatia. Distance and e-learning started to be increasingly popular during the Covid-19 pandemic lockdowns, opening the opportunity for similar programs from the U.S. to be offered in Croatia.

An effective way for U.S. institutions, such as universities and high schools, to enter the market is to establish a partnership with a Croatian education institution for student exchange. With partnership agreements, institutions can facilitate the exchange of students and provide recognition of course credits between the schools. This also gives the opportunity for professors to guest lecture at the partner institution.

The Fulbright Program has been active in Croatia since 1964 and offers grants to qualified Croatian students to study at the graduate level in the United States. More than 500 Croatian scholars and students have studied in the United States under the auspices of the Fulbright Academic Program.

### DIGITAL MARKETING STRATEGIES

#### Most Used Student Platforms

"Merlin" is the most used platform among students for sharing files with their professors, updating schedules, and for lecture papers. It was created by the University of Zagreb. Also, the "InfoEdukas" platform is very popular. Every college has a different adaptation of this platform.

A platform called “CarNET” is mostly used for accessing important information, such as student login information, and was one of the first email providers to be connected with students. “Studomat” is also a very reputable website used by students. “eGrađani” is used by parents.

### Most Popular Social Media Sites for Students

The most used platforms are Facebook and Instagram. Among 2,149,000 recorded Facebook accounts, roughly 20% were students, while on Instagram there were 1,235,000 recorded users, with roughly 29% of them being students. Snapchat is also popular, with 465,000 users, but mostly for quick texting and is used predominately by a female audience. A little less, but still popular are Reddit, Twitch, and WhatsApp. LinkedIn and Twitter have gained in popularity during the pandemic. Zoom, Microsoft Teams, Google Classroom, and Big Blue Button are the most frequently used for online lectures at all levels of education.

### Student Research Information Sources

Google is the most visited website for research in Croatia. For news updates, the most visited are media portals: [index.hr](http://index.hr), [24sata.hr](http://24sata.hr), [jutarnji.hr](http://jutarnji.hr), [skole.hr](http://skole.hr), [dnevnik.hr](http://dnevnik.hr), [net.hr](http://net.hr), [vecernji.hr](http://vecernji.hr), [tportal.hr](http://tportal.hr).

### Job search platforms most used by students

The most used websites are: [moj-posao.net](http://moj-posao.net), [posao.hr](http://posao.hr), and LinkedIn.

### The Most Popular Video Streaming Platforms

The most used streaming platforms are: YouTube and Twitch.

### Platforms for Reaching Students by In-Country Schools and Competitor Countries

The best way to reach students is through social media ads on platforms like Facebook and Instagram, as well as sponsoring ads on Google and YouTube. Another technique is to purchase ad space on certain websites of student interest, such as for partner education institutions, technical pages, job search pages, etc.

### Resources used by Students and Parents to Find Educational Opportunities

Students and parents receive most of this kind of information through their high school's management and local education agents. Occasionally, there are guest lecturers at the high schools where students and parents learn about opportunities.

### Digital outreach strategies for U.S. Study State Consortia and Education Institutions

Advertising through social media is very important. Sending guest lecturers to high schools to promote foreign institutions is recommended since students do not get much information on education abroad opportunities through the Croatian education system.

### EVENTS

The most important education fair in Croatia is the Higher Education and Scholarships Fair,

which takes place every year in Zagreb. This fair is important to showcase study opportunities and student financial aid available in Croatia and abroad. International and local exhibitors have a unique opportunity to present their institutions, study programs, scholarships, and other educational services to over 10,000 Croatian students, parents, adult learners, and higher education professionals. For more information, please visit [www.stipendije.info/en/fair](http://www.stipendije.info/en/fair).

World Education Fair – October 2023: <https://www.iwef.eu/?market=6>

### RESOURCES

- U.S. Commercial Service – Croatia: <https://www.trade.gov/croatia>
- Ministry of Science & Education: <https://mzo.gov.hr/en>
- Higher Education and Scholarship Fair: [www.stipendije.info/en/](http://www.stipendije.info/en/)
- Institute for the Development of Education: <http://www.iro.hr/en/>
- Statistics office: [https://www.dzs.hr/default\\_e.htm](https://www.dzs.hr/default_e.htm)
- Agency for Science and Higher Education: <https://www.azvo.hr/en/higher-education/higher-education-institutions-in-the-republic-of-croatia>

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# DOMINICAN REPUBLIC

<b>Capital:</b>	Santo Domingo
<b>Population:</b>	10.7 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$207 billion (2021 est., in 2017 dollars)
<b>Currency:</b>	Dominican pesos (DOP)
<b>Language:</b>	Spanish

## UNESCO Student Mobility Number:

The Dominican Republic has 4,079 students studying abroad according to UNESCO.

## CIA World Factbook:

45% of the population in the Dominican Republic is under 25 years old.

## OVERVIEW

The United States is a leading destination for students from the Dominican Republic. During the 2021/2022 academic year, the number of students from the Dominican Republic totaled 1,300, a 4.5% increase over the previous academic year, which saw 1,244 students.

According to UNESCO data, the United States was the second largest market for Dominican students after Spain. In 2021, UNESCO reported that the top markets for Dominican Students were:

1. Spain
2. United States
3. France
4. Canada
5. United Kingdom
6. Germany

## SUB-SECTORS

### Undergraduate Education

794 students from the Dominican Republic were enrolled in undergraduate programs in the United States during the 2021/22 academic year, this is a 2.1% increase from the previous academic year.

### Graduate Education

298 students from the Dominican Republic were enrolled in graduate programs in the United States during the 2021/22 academic year, a 9.2% increase from the previous academic year.

## Non-Degree

58 students from the Dominican Republic were enrolled in non-degree programs in the United States during the 2021/22 academic year, a 35% increase from the previous academic year.

## OPT

150 students from the Dominican Republic were enrolled in OPT programs in the United States during the 2021/22 academic year, the same as the previous academic year.

## OPPORTUNITIES

Exchange programs and partnerships with higher education institutions in the Dominican Republic is a common method for market entry.

## Graduate Programs

The Ministry of Higher Education, Science, and Technology (MESCyT) continues to support study abroad for graduate education levels (Master's and Doctorate). Priority fields for MESCyT are those aligned with priorities identified by the Dominican government for the sustainable development of the country. They are: Innovation, Tourism, Technology, Basic Sciences, Education, and Engineering. MESCyT works with U.S. universities to establish agreements, particularly with universities that offer in-state tuition for students from the Dominican Republic. For more information, see: <https://mescyt.gob.do/becas/internacionales/>. In 2021, the MESCyT established agreements with 62 higher education institutions (worldwide) to offer 1,700 scholarships for an approximate amount of US\$30 million.

## Travel and Hospitality Programs

Because of the importance of the tourism industry in the Caribbean, travel and hospitality programs are popular with students from this region.

## Grants and Scholarship Programs

There are some academic scholarship opportunities for Dominican students who have earned outstanding grades and scores on their ACT and/or SAT exams.

## INICIA Educación

Provides scholarships to Dominican educators, administrators, and professionals for graduate degrees in education-related fields: <http://iniciaeducacion.org>.

## Caribbean Hotel & Tourism Association Education Foundation (CHTAEF)

Pre-pandemic CHTAEF awarded scholarships to students who have demonstrated a strong commitment to the industry and the potential for future success. The scholarships had been temporarily suspended, but are expected to return soon - <http://www.caribbeanhotelandtourism.com/about-the-foundation/apply-for-scholarship/>.

## Fulbright

The Fulbright Program offers grants to qualified Dominican graduate students to study at the graduate level in the United States. Dominican scholars are eligible for Fulbright Scholar-in-Residence grants: <https://eca.state.gov/fulbright/country/dominican-republic>.

## CHALLENGES

While the United States continues to be a popular destination for students from the Dominican Republic, there are challenges to this market:

- Rising tuition costs at U.S. universities discourage students from choosing U.S. higher education institutions.
- Increased competition from other English-speaking countries, such as Canada and the United Kingdom.
- The perception that it is too difficult to obtain a U.S. student visa deters students from considering U.S. higher education institutions.

## DIGITAL MARKETING STRATEGIES

Zoom and Google Classroom (Meets & Hangouts) are the most used platforms by students in the Dominican Republic. Canvas is also used and most universities and private schools have customized platforms.

The most popular social media sites for students in the DR are Instagram and TikTok. The most popular platforms for streaming videos in the DR are YouTube and Instagram.

Students research information on any given topic using Google, Google Scholar and Wikipedia mostly. They search for job opportunities on Aldaba ([www.aldaba.com](http://www.aldaba.com)), Google, and LinkedIn.

The most common way to reach out to students is advertising on social media (Instagram and Facebook), followed by in-bound marketing. Additionally, every year the Ministry of Higher Education of the Dominican Republic publishes in the local newspapers (March/April) the list of scholarship opportunities for students.

## EVENTS

EducationUSA routinely organizes public orientation sessions to inform prospective students on studies in the United States.

## RESOURCES

- U.S. Commercial Service – Dominican Republic: <https://www.trade.gov/dominican-republic>
- Ministry of Higher Education of the DR: <https://mescyt.gob.do/becas-internacionales>
- INICIA Educación: <http://www.iniciaeducacion.org>
- Caribbean Hotel & Tourism Association: <http://www.caribbeanhotelandtourism.com/about-the-foundation/apply-for-scholarship/>
- Fulbright: <https://eca.state.gov/fulbright/country/dominican-republic>

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# EGYPT

**Capital:** Cairo  
**Population:** 109.5 million (2023 est.)  
**GDP (Purchasing Power Parity):** \$1.26 trillion (2021 est., in 2017 dollars)  
**Currency:** Egyptian Pounds (EGP)  
**Language:** Arabic (official), Arabic, English, and French widely understood

## UNESCO Student Mobility Number:

Egypt has 47,243 students studying abroad according to UNESCO.

## CIA World Factbook:

51.63% of the Egyptian population is under 25 years old.

## OVERVIEW

Egypt is the most populated Arab country, with 107.8 million people as of July 2022, with approximately 31% being of school-going age. Consequently, Egypt has the largest student population in the MENA region, estimated at 24 million K-12 students in 2022, with Greater Cairo accounting for 20% (4.6 million) of the total number. Egypt's population is expected to reach 128 million by 2030, from 101 million in 2020. The increase in population is expected to create demand for additional school seats. Based on Colliers projections, an additional 11.0 million new seats will be required in Egypt by 2030, out of which 2.1 million will be in the private sector, while in Greater Cairo, an additional 2.3 million seats will be required by 2030 (Collier Int, 2020).

By 2030 there is also expected to be over 37,000 households that can afford to pay over \$15,000 per annum, creating demand for international branded schools. However, the demand gap is not across Greater Cairo, but rather in specific locations based on the current and projected number of households and income level.

Regarding higher education, in total, 3.5 million students are enrolled in Egypt in 2022, which is 2.1% higher than previous year. The Ministry of Education expects the number of university students in Egypt to grow to 5.6 million by 2032. In total, the number of Egyptians who study overseas has grown more than five-fold over the past two decades, growing from 8,800 in 2000 to 47,243 in 2021-2022. The government has made this trend a priority as demonstrated through its internationalization strategy. This includes regulations that mandated universities launch new faculties to form academic partnerships with foreign universities that rank higher than Egypt's highest ranking academic institution. Egypt currently boasts 36 private universities and technical colleges that offer apprenticeship programs, up 100% from 18 in 2014, with a more diversified portfolio of faculties. The number of faculties in those universities also doubled to a total of 264, compared to 132 in 2014. The number of private academies grew 9% between 2014 and 2021, reaching a total of 172.

The number of public universities jumped from 23 to 27 between 2014 and 2021, marking a 17.4% increase.

In the U.S., there were 3,967 students from Egypt in the 2021-2022 academic year, an 8% increase from the year prior.

## OPPORTUNITIES

### Online Degrees

The Ministry of Higher Education has already embedded online learning into some of the new degrees it's offering in partnership with international universities. As per Dr. Mohamed El Shinnawi, an advisor to the Higher Education Minister, there might be fully online degrees soon, as Egypt is finalizing its online degree regulations.

### New Trends

Today, there are several faculties and specializations that cater to the workforce of tomorrow. For instance, you can now study motorsports engineering and computer games development at the European Universities in Egypt (EUE); nuclear power stations engineering at the Egyptian Russian University (ERU); and ethical hacking and cyber security at The Knowledge Hub Universities (TKH).

### Foreign Universities Opening Branch Campuses

In July 2018, Egypt ratified into law the International Branch Campus Act, which has allowed international universities to set up branches in Egypt by building their own campuses or by partnering with an Egyptian company.

Foreign university branch campuses are required to pay 2% of their annual tuition income as fees to the government. The government also requires that 5% of the campus' projected financing be secured before receiving a license. While no restrictions have been placed on choosing a site, the government has been actively promoting its emerging New Administrative Capital City on the outskirts of Cairo.

### New Technology Universities

The government, as part of its efforts to develop the country's vocational education offerings and cope with local and regional labor market demands, has recently established three technology universities.

The new universities are located in New Cairo City (<https://nctu.edu.eg/en/home/>), in Quesna, and in Beni Suef, all modern industrial zones. The three universities offer specializations in information technology, mechatronics and autotronics (modern automotive technology), power plant operation, and maintenance technology. Other universities are also planned, specializing in areas such as construction, maintenance, building materials, health and applied sciences, and fisheries and aquaculture. Tuition fees range from 8,000 to 12,000 Egyptian pounds (\$500 to \$750) per semester.



## DIGITAL MARKETING STRATEGIES

According to the Digital 2022 report for Egypt:

- There were 75.66 million internet users in Egypt in January 2022. Internet users in Egypt increased by 1.4 million (+1.9%) between 2021 and 2022 and is male dominated.
- YouTube had 46.30 million users in Egypt in early 2022, overtaking the number of users for Facebook.
- Facebook had 44.70 million users in Egypt in early 2022. Facebook is the most used social media platform in Egypt (80.34%), followed by YouTube (13.42%), Twitter (3.65%), and Instagram (0.3%).
- TikTok had 20.28 million users aged 18 and above in Egypt in early 2022
- Instagram had 16 million users in Egypt in early 2022
- There were 98.29 million mobile connections in Egypt in January 2022.

## RESOURCES

- U.S. Commercial Service – Egypt- <https://www.trade.gov/egypt>
- Enterprise Press International Branch Campuses -<https://enterprise.press/blackboards/light-touch-regulation-attracted-international-branch-campuses-egypt/>
- New Cairo Technological University - <https://nctu.edu.eg/>
- World Bank Blogs Article: Blending Learning - <https://blogs.worldbank.org/arabvoices/egypt-back-school-brings-new-test-blending-learning>
- Enterprise Press International Branch Campuses - <https://enterprise.press/wp-content/uploads/2021/01/Egypt-K12-Education-Sector-Market-Overview.pdf>
- PWC Understanding Middle East Education Egypt Profile - <https://www.pwc.com/m1/en/industries/education/education-country-profile-egypt.html>

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# ETHIOPIA

<b>Capital:</b>	Addis Ababa
<b>Population:</b>	116.4 million (2023 est.)
<b>GDP (Purchasing Power Parity)</b>	\$278.94 billion (2021 est.)
<b>Currency:</b>	Birr (ETB)
<b>Language:</b>	Oromo (official working language in the State of Oromiya) 33.8%, Amharic (official national language) 29.3%, Somali (official working language of the State of Sumale) 6.2%, Tigrigna (Tigrinya) (official working language of the State of Tigray) 5.9%, Sidamo 4%, Wolaytta 2.2%, Gurage 2%, Afar (official working language of the State of Afar) 1.7%, Hadiyya 1.7%, Gamo 1.5%, Gedeo 1.3%, Opuuo 1.2%, Kafa 1.1%, other 8.1%, English (major foreign language)

## UNESCO Student Mobility Number

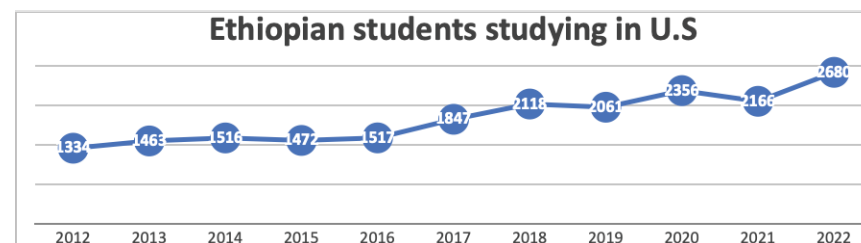
Ethiopia has 8,124 students studying abroad according to UNESCO.

## CIA World Factbook

59.28% of the Ethiopian population is under 25 years old.

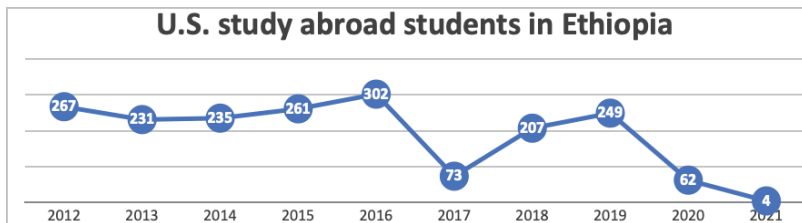
## OVERVIEW

Academic institutions in Ethiopia are growing rapidly creating high potential for students who wants to continue study abroad. Ethiopia followed by Nigeria, Ghana and Kenya ranked fourth among Sub-Saharan Africa countries in sending students to U.S universities.



Ethiopian students are most interested in science and technology fields, particularly engineering, computer science, and medicine. This may be influenced by Ethiopia's 2008 education policy, which dictated that 70 percent of all students pursue science and technology-related degrees, while 30 percent pursue the social sciences. The U.S remains the number one destination for Ethiopian students.

Also, growing number of U.S. study abroad students were registered in Ethiopia over the years.



### SUB-SECTORS

Students in U.S. by Academic Level	% By Academic Level	Number of Students	% Change (2021 to 2022)
Undergraduate	64%	1,705	25.6%
Graduate	23%	609	25.6%
Non-Degree	2%	60	-36.2%
OPT	11%	306	33.6%

### OPPORTUNITIES

Individuals' economic growth is increasing, and it is desirable to send one's children to the U.S. for education. Most families prefer community colleges because the lower tuition is more affordable.

The existence of many international and private schools in Ethiopia helps recruitment efforts by U.S. higher education institutions.

The U.S. Commercial Service at the U.S. Embassy in Ethiopia can help U.S. education institutions to meet with potential recruitment partners via our customized services, such as Virtual Introductions, Single School Promotions, and the like. There is also an EducationUSA Advising Center in the U.S. Embassy, which helps to assist U.S. higher education institutions in Ethiopia to create a platform for connecting with Ethiopian local students.

### DIGITAL MARKETING STRATEGIES

Social media sites such as YouTube, Telegram, WhatsApp, Facebook, Instagram and TikTok are the most popular sites for students in Ethiopia. Students research information via the Internet and via in-person or phone conversations with colleagues and elders. To search for job opportunities, students use print magazines, online job websites, radio, and television. For streaming videos, YouTube, TikTok, and Facebook are most popular.

Local schools in Ethiopia and schools from competitor countries use social media, traditional print ads, their country's embassy, and recruitment agents to reach students. Students and their

parents receive information on educational opportunities through websites and links shared or recommended by friends and family, through social media, through agents, and through their schools.

### Recommendations for U.S. education institutions and study consortia to better promote themselves in Ethiopia include:

(1) utilize social media and other online platforms that are easily accessible through mobile phones, (2) run intensive ads on national television, (3) participate in networking programs and partnerships with non-profit education institutions.

### EVENTS

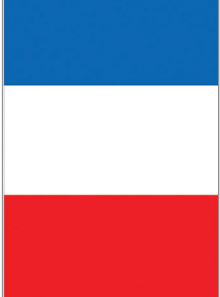
The Public Affairs Office at the U.S. Embassy organizes education fairs.

### RESOURCES

- U.S. Commercial Service - Ethiopia: <https://trade.gov/ethiopia>
- Federal Democratic Republic of Ethiopia Ministry of Education Website: <https://moe.gov.et>
- EducationUSA Advising Centers in Ethiopia: Addis Ababa
  - Email: [AddisAbaba@educationusa.org](mailto:AddisAbaba@educationusa.org)
  - Telephone: +251 111307924/7625
  - Websites: <https://educationusa.state.gov/centers/educationusa-advising-center-addis-ababa> and <https://et.usembassy.gov/education-culture/study-usa/>

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# FRANCE

<b>Capital:</b>	Paris
<b>Population:</b>	68.5 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$3.04 trillion (2021 est., in 2017 dollars)
<b>Currency:</b>	Euro (EUR)
<b>Language:</b>	French

## UNESCO Student Mobility Number:

France has 108,654 students studying abroad according to UNESCO.

## CIA World Factbook:

30.24% of the French population is under 25 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 always interest in studying in English-speaking countries, such as the United States. Students consider that the experience of studying abroad will benefit them in the future. Moreover the ability to speak English in a professional setting gives French students a competitive edge in the employment market. During the 2020/2021 academic year, 5,643 French students pursued academic study at U.S. colleges and universities, contributing \$284 million to the U.S. economy.

France is the 24th leading country of origin for students coming to the United States (-33.4% from last year) and the sixth leading host country for U.S. students studying abroad (-53.8%). For French students studying English overseas, the U.S. is the third-most popular destination (behind Canada and 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 it is endorsed by the Association of American Universities, the Association of Public and Land Grant Universities, the Institute of International Education, and NAFSA, the Association of International Educators.

## The Impact of COVID-19

The COVID-19 pandemic disrupted international student mobility, with successive lockdowns, difficulty in travel, and closed borders. Brexit also had an impact on mobility in Europe. Despite this challenging context, France saw only a moderate decline in international students. On June 17, 2021, all travel from the United States into France was once again permitted. The French Minister of Higher Education announced that in the Fall of 2021, 100% of classes would be held in-person.

International students who reside in countries affected by pandemic-related travel bans such as France were able to enter the U.S. under NIE (national interest exceptions) by the U.S.

Department of State. Consular posts overseas have processed nonimmigrant visa applications prioritizing students.

Distance learning--counted by Open Doors for the first time this year--has allowed many international students enrolled at U.S. institutions to continue their studies despite the crisis. The number of French students enrolled in a master's or doctoral program in the U.S., for example, decreased by only 16.7% from the previous year.

## SUB-SECTORS

### Academic Level

There are 7,751 French students studying in the U.S., which accounts for 0.6% of the total number of international students in the United States. In 2021/22, the breakdown was as follows: 37.4% undergraduate students, 29.5% graduate students, 23.4% non-degree and 15.3% OPT (Optional Practical Training).

### Fields of Study

In 2021/22, the preferred fields of study for French students in the United States were : Business/Management (24.1%), Engineering (15.3%), Math/Computer Science (7.8%) and Social Sciences (10.2%). Only .6% studied intensive English.

### Community Colleges

These institutions 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.

According to a survey conducted by 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. 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%).

## DIGITAL MARKETING STRATEGIES

American institutions may benefit from social media opportunities:

- The most popular online platforms that French students use are mostly social media platforms like Facebook, YouTube, Instagram, Twitter, and LinkedIn. Pinterest, TikTok, and Snapchat are also popular.
- The most popular social media site is YouTube, and Instagram is becoming more and more popular for students less than 25 years old. TikTok is also used, primarily by high school students.
- Students often research information on any given topic through Google and YouTube.
- The platforms that students use for job opportunities include LinkedIn and Indeed.
- The most popular video streaming service in France is YouTube.
- In-country schools and competitor countries use informational events at universities or schools as well as Instagram and YouTube (with less and less use of Facebook and Twitter).
- Parents and students mainly receive information about educational opportunities through the local CIO (information and orientation center) but also from the fairs organized by L'Etudiant and Studyrama, the two main student organizations in France.
- It is recommended for U.S. study state consortia and/or educational institutions to get in contact with the EducationUSA advising center in Paris.

## EVENTS

- Studyrama International Studies Fair. For upcoming events visit: <https://www.studyrama.com/salons/>
- Go Study Abroad, International Student Fair, <https://www.letudiant.fr/espace-pro/decouvrez-l-etudiant-l-etudiant-a-l-international.html>
- Educatec/Educatrice, Annual Professional event of Digital Education, Porte de Versailles, Paris- November 15-17, 2023 - <https://www.educatech-expo.com/en>

## RESOURCES

- U.S. Commercial Service – France: <https://www.trade.gov/France>
- Fulbright Commission: <https://fulbright-france.org/>
- AAWE To Education in France: <https://www.aaweparis.org/guide-to-education/>

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# GERMANY

<b>Capital:</b>	Berlin
<b>Population:</b>	84.2 million (2023 est.)
<b>GDP (Purchasing):</b>	\$4.42 trillion (2021 est., in 2017 dollars)
<b>Power Parity)</b>	
<b>Currency:</b>	Euros (EUR)
<b>Language:</b>	German

## UNESCO Student Mobility Number:

Germany has 123,512 students studying abroad according to UNESCO.

## CIA World Factbook:

22.7% of the German population is under 25 years of age.

## OVERVIEW

Germany has the largest economy in the European Union (EU). Germans are well-educated and experience abroad is seen as a key advantage when competing for employment and additional educational opportunities. Over 90% of Germans study English, which is the first foreign language learned in school. English language courses are mandatory for almost every German student, with the degree of difficulty depending on the school level. English is taught in primary school starting in the third grade at the latest.

## SUB-SECTORS

### Higher Education

There were 8,550 international students from Germany at U.S. higher education institutions in 2021/22. This is up 59.4% from the previous year, as the effects of the Coronavirus pandemic have begun to lessen, and students globally once again begin to partake in exchanges abroad.

### Undergraduate

During the 2021/2022 academic year, 2,839 German students studying in the United States are enrolled in undergraduate courses, which is an increase of 18.1% compared to the 2020/2021 academic year.

### 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. This option is also attractive because it is possible for Germans to register at a community college without an "Abitur" (a required qualification exam for German university).

## Graduate Education

During the 2021/2022 academic year, 2,563 German students studying in the United States were enrolled in graduate courses, an increase of 26.8% compared to 2020/2021.

## Secondary Education

In the academic year of 2021/2022, 5,100 German high school students participated in an exchange program from Germany.

## Non-degree

2,464 Germans studying in the United States in 2021/2022 attended non-degree programs such as English language or short-term studies, which represents a 743.8% increase compared to the previous year (2020/2021).

## Online Programs

Due to its flexibility, a possibility to work full-time, and the “virtual presence” factor, online education is very popular in Germany, and this trend is expected to continue. For the most part, online offerings complement traditional face-to-face instruction. Accordingly, for example, students prepare for seminars with videos, complete self-study programs during a classroom session, or produce group presentations with the aid of digital media.

## 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”) seeks to stabilize and increase funding 5% annually for the main non-university research organizations (Fraunhofer-Society, Helmholtz-Association, Max-Planck-Society, Leibniz-Association, German Research Foundation). These funding increases are tied to research policy objectives set forth in the Pact. Federal and Laender (state) governments have agreed to continue the Pact for Research and Innovation until 2030, with a first-ever ten-year extension. Funding will continue by 3% annually initially until 2025.

## Professional Training Services

German companies tend to use private trainers to train employees rather than provide in-house training. The German Association for Coaching and Training: [www.dvct.de](http://www.dvct.de), with more than 1,600 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.

## Undergraduate Recruitment

Recruiting full-time German undergraduate students poses challenges for U.S. institutions which must compete with a high quality and tuition free education system which is also one year

shorter. Four-year U.S. programs could be attractive to students and parents for their versatility, smaller class sizes, and individual attention to student success. Internships during a program, optional practical training after, and career services are all very important to German students. When opting to invest in a fee-based education, Germans are quite brand-conscious. To increase recognition, U.S. institutions should use their international alumni, and sister city connections where possible.

## Community College

German students with no “Abitur” 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, though the Associate Degree is, unfortunately, not recognized in Germany.

## Graduate Recruitment

The United States is a particularly popular choice for graduate students, especially for those with aspirations in the science world. The most popular field of study for international students in the United States is math and computer science, with 21% of students choosing that specialty. Other popular fields for international students are engineering with 20% and business and management with 16% of all students choosing to pursue a degree in this field. Among German students, approximately 26% are enrolled in business and management programs and another 14% in miscellaneous social sciences. An MBA from a U.S. university is one of the most attractive diplomas for business students anywhere in the world, and sure to catch the attention of employers seeking young employees with management potential. Traditional MBA programs are two academic years in length for full-time students. However, there are a variety of one-year and part-time MBA programs as well as on-line and distance learning MBA programs. Despite strong support for German non-degree students through institutions like the German Academic Exchange Service (DAAD) and the German American Fulbright Commission, there is a lack of funding options for students seeking degrees in the United States. Additionally, there has been increased competition from graduate programs from other countries.

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 because education in Germany is free. Additionally, 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 DAAD (<https://www.daad.de/en/>) and the Fulbright Commission (<https://www.fulbright.de/>) as well as private sector recruiters and advisors and through the 10 U.S. State Department EducationUSA centers in Germany (<https://educationusa.state.gov/country/de>). There are also several events focused on student recruitment, listed at the end of the report, which take place in Germany.

## Secondary Education

It is very common for German students to study abroad at the high school level, and Germany remains one of the most prolific sending countries of high school exchange students to the United States. Due to the Covid-19 pandemic, the number of German High School students staying in the United States for at least three months were 5,100 in 2021/2022. High school exchanges to the United States can be facilitated through an organization (non-profit or commercial) or can be self-initiated. Many cities in Germany offer youth exchange fairs, which allow students to compare and choose from different organizations. A self-initiated exchange is possible, albeit more complicated. According to EducationUSA, the costs for a high school exchange range from \$11,800–\$16,500 depending on a variety of factors including the state, the high school, and visa status. Certain German organizations provide scholarships or financial aid; however, these are only applicable if the exchange is facilitated through an organization, not if organized privately. EducationUSA advisors in Germany can provide additional information on high school exchange programs.

## 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 with the U.S., and a well-established secondary exchange program. The average time for Germans attending intensive English programs in the United States is 12.1 weeks.

## DIGITAL MARKETING STRATEGIES

- The most popular social media sites include Instagram, Facebook, WhatsApp, and Snapchat.
- Students often research information on any given topic through Google and other search engines.
- The platforms that students use for job opportunities include Indeed, LinkedIn, Stellenwerk, university platforms, and university bulletin boards.
- The most popular streaming services in Germany include YouTube, Netflix, and Amazon Prime.
- In-country schools and competitor countries use information events at universities or schools, websites, emails, and social media channels to reach German students.
- Parents and students mainly receive information about educational opportunities through the internet and email.
- It is recommended for U.S. study state consortia and/or educational institutions to use social media platforms like LinkedIn in their digital outreach strategies.

## EVENTS

- Learntec (May 23-25, 2023, Karlsruhe): <http://www.learntec.de/en>
- Zukunft Personal (September 12-14, 2023, Stuttgart): <http://www.zukunft-personal.de/en>
- EducationUSA: <https://educationusa.state.gov/country/de>
- International College Days - September 18-22, 2023: <https://collegedayfairs.org/exhibit-at-icd-1>
- Jugendbildungsmesse: <https://jugendbildungsmesse.de/>

- U.S. Commercial Service - Germany: <https://www.trade.gov/germany>
- Deutscher Akademischer Austauschdienst (German Academic Exchange Service): <http://www.daad.de/en/>
- Fulbright Commission: <http://www.fulbright.de/>

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# GHANA

<b>Capital:</b>	Accra
<b>Population:</b>	33.8 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$178.45 billion (2021 est., in 2017 dollars)
<b>Currency:</b>	Cedis (GHC)
<b>Language:</b>	English (official), Asante 16%, Ewe 14%, Fante 11.6%, Boron (Brong) 4.9%, Dagomba 4.4%, Dangme 4.2%, Dagarte (Dagaba) 3.9%, Kokomba 3.5%, Akyem 3.2%, Ga 3.1%, other 31.2% (2010 est.)

## UNESCO Student Mobility Number:

Ghana has 18,214 students studying abroad according to UNESCO.

## CIA World Factbook:

56.08% of the population in Ghana is under 25 years of age.

## OVERVIEW

### The Education System

Ghana has been a pioneer in modern mass education in West Africa. First introduced in Christian missionary schools and colonial government schools, most notably in coastal areas during the period of formal British rule after 1867, modern European-style education was greatly expanded by Ghana's government after achieving independence in 1957. The introduction of free and compulsory basic education in 1961 was a veritable milestone achievement that greatly helped advance access to education, as was the founding of the first Ghanaian universities: the University of Ghana, originally established under British rule in 1948, and the Kwame Nkrumah University of Science and Technology (KNUST), opened in 1952. Estimated at less than 20 percent at the time of independence, Ghana's adult literacy rate has now shot up to 79%.

### Administration of the Education System

Ghana is a unitary republic with 10 administrative regions. Some 70 percent of the population lives in the more industrialized southern parts of the country, home to the country's two largest urbanizations: Kumasi (1.5 million people) and the capital city of Accra (1.7 million people).

Education is centrally administered by the Ministry of Education (MOE) in Accra, which oversees several different agencies, including the Ghana Education Service (GES - <https://www.ges.gov.gh/about/us>), responsible for the school system and pre-tertiary technical and vocational education and training (TVET - <https://ges.gov.gh/>), and the National Council for Tertiary Education in charge of higher education. The Ministry of Education and its agencies' guidelines are implemented locally by government offices in Ghana's regions, as well as by district offices.

## SUB-SECTORS

### Basic Education

Ghana's school system is modeled after the British system but has undergone a number of changes over the past 60 years. Before 1974, for instance, the system was structured into six years of elementary education and four years of secondary education. The select few students who went on to higher education then had to complete a two-year, UK-based advanced level (A-level) university-preparatory curriculum before enrolling in three-year undergraduate programs (6+4+2+3). At present, the system is divided into six years of elementary education and three years of junior secondary education (jointly referred to as basic education), followed by three of senior secondary education and standard four-year university programs (6+3+3+4). Basic education until grade nine is compulsory for all Ghanaian children, but senior secondary education is not.

Elementary education in Ghana begins at the age of six and is nominally free of charge at public schools. However, even public schools charge fees for various items like teaching materials or uniforms, so that education is not entirely free. In fact, according to some estimates, fees at public elementary schools are only 21 percent lower than at private schools – a circumstance that has facilitated the spread of private schools, particularly in rural areas where governmental provision is lacking. The percentage of children enrolled in private elementary schools increased from 13 percent in 1999 to 28 percent in 2018 (per UIS data).

The elementary school curriculum focuses on developing basic reading and writing abilities, arithmetic, and problem-solving skills. The subjects taught include English, local languages in early grades, mathematics, social studies, integrated science, arts, physical education, and civics. Elementary education concludes with the completion of grade six.

Junior secondary education is open to all students who complete elementary education – there are no entrance examinations. It lasts three years (grades seven to nine or forms I to III) and concludes with the Basic Education Certificate Exam (BECE). Conducted by the West African Examinations Council (WAEC) in June each year for ninth graders who have been approved by the Ghana Education Service to sit for it, the BECE subjects include English, Ghanaian language and culture, social studies, integrated science, mathematics, design and technology, religion and civics, information technology, as well as French as an optional subject (<https://www.waecgh.org/>).

In 2017, 468,053 students in Ghana sat for the BECE – a sizeable increase over the 422,946 in 2014. The final grade average of the Basic Education Certificate is based 70 percent on test performance, whereas continuous school assessment accounts for 30 percent of the final grade. WAEC uses a nine-point numerical grading scale, with 1 being the highest and 9 the lowest possible grade. There's no hard failing grade – the grading system is flexible, with 9 simply being interpreted as the “lowest grade”. However, the exams are nevertheless highly important since the BECE grade average determines the eligibility for admission into senior secondary school.

### The West African Examinations Council (WAEC)

After independence, the countries of British West Africa successively transitioned from using

a U.K.-based school curriculum to the examinations format of the regional WAEC. Originally established in the 1950s as a means to “harmonize and standardize pre-university assessment procedures in ... British West Africa” (<https://www.waecgh.org/about-us>), the Council is now an international organization with five member states: Ghana, Nigeria, Sierra Leone, the Gambia, as well as Liberia. Headquartered in Accra, the WAEC conducts examinations and issues certificates that serve as school completion certificates and the main university entrance criterion in the different member states. While the WAEC offers the international West African Senior School Certificate Examination (WASSCE) in all member states, other WAEC exams are tailored to specific national needs and only given in particular member states. In Ghana, for example, the WAEC administers the Basic Education Certificate Exam at the end of grade nine at the national level.


The Ghanaian WAEC examination, like those in Nigeria and other West African countries, is unfortunately characterized by a relatively high incidence of examinations fraud and cheating, such as the use of cell phones during the exams and the leaking of examination questions. In 2017, for instance, 13,793 takers of the senior secondary exams, or almost 5 percent of all 287,353 test takers, were implicated in some form of exam malpractice. Since 2013, the WAEC has used biometric fingerprint identification to prevent impostors from sitting for exams and has created an elaborate scratch card system for the verification of exam results. The use of closed-circuit television cameras in test centers in Ghana is planned as well (<https://dailyguidenetwork.com/conducting-credible-examinations-ghana-waec-role/>).

### Senior Secondary Education

The vast majority of graduates from basic education who wish to continue their education get assigned to senior secondary schools based on a “computerized school selection placement system”. Admission is competitive and only good students have the option to choose the school they wish to attend. Senior secondary education is free.

The eighth-grade scale used to grade the exams is as follows: Forty percent is the minimum passing percentage in each subject; top grades are very difficult to achieve – in 2018, more than 62 percent of 315,621 test takers failed to score C6 or above in at least three core subjects – the minimum standard for admission into university (<https://www.ghanaweb.com/ghanahomepage/newsarchive/over-190-000-ghs-graduates-to-miss-varsity-due-to-failure-in-mathematics-669054>). Grades awarded tend to be highest in social studies and lowest in mathematics. In 2017, 73% of Ghanaian candidates scored within the top five grades (A1 to C6), but only 38 percent scored within that range in mathematics (<https://www.graphic.com.gh/news/education/wassce-2018-candidates-performed-poorly-in-english-maths.html>). Cheating also continues to be a problem. In 2018, the examination results of 26,434 students were withheld due to examination malpractice.

WASSCE Grading Scale			
GRADE	DESCRIPTOR	PERCENTAGE	WES CONVERSION
A1	Excellent	75-100	A
B2	Very good	70-74	A
B3	Good	65-69	B
C4	Credit	60-64	B
C5	Credit	55-59	B
C6	Credit	50-54	B
D7	Pass	45-49	C
E8	Pass	40-45	C

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### Admission to Higher Education

While university admissions criteria in Ghana may vary somewhat by institution, the baseline admissions requirements for all providers are set by the National Accreditation Board. All candidates must have a minimum grade of 6 in at least three WASSCE core subjects, as well as in three elective WASSCE subjects. Given the surging demand for higher education in Ghana, admission is highly competitive, especially at top public universities. Some institutions may require that applicants have completed elective courses related to their intended major and may have additional entrance examinations – a practice that is also common for mature students opting for higher education at a later age. Admission requirements at polytechnics and private higher education institutions (HEIs) tend to be lower than at public universities. In fact, there have been repeated claims that private universities are admitting unqualified students – Ghana’s National Accreditation Board in 2011 alleged that private universities had admitted hundreds, if not thousands, of students that did not meet the mandatory minimum requirements and threatened to bar these students from graduating. In 2018, the Ghanaian Ministry of Education made similar complaints.

### Higher Education

Ghana’s higher education sector has mushroomed in recent years. Tertiary enrollments doubled between 2009 and 2015 alone, jumping from 203,337 students to 417,534 students within just six years (UIS data). Like in other African countries, this expansion has been accompanied by a rapid growth of the private sector – the number of private HEIs increased from just two private universities in 1999 to eighty private universities and colleges today. In general, the surging demand for education makes it increasingly difficult for the Ghanaian system to effectively provide mass education while maintaining quality standards. A shortage of qualified instructors,



for instance, has caused teacher-to-student ratios in popular disciplines like business to soar to 161 to 1 as of 2017.

### The Higher Education Degree Structure

Ghana has a binary qualifications structure that includes applied Higher National Diploma programs offered mostly by polytechnics (technical universities), as well as bachelor's, master's, and doctoral degrees offered by universities. According to statistics provided by the National Accreditation Board, the vast majority – 70.5 percent – of students at public HEIs were enrolled in bachelor's programs, whereas 22.4 percent studied for post-graduate diplomas, the latter overwhelmingly as distance education students. Enrollments in graduate programs were comparatively small – only 6.3 percent and 0.5 percent were enrolled in master's and doctoral programs, respectively, in the 2015/16 academic year. The introduction of free senior secondary education was expected to help boost the number of students entering higher education programs from 90,000 in 2018 to 145,000 in 2020.

### Ghana's Tertiary Grading Scale and Credit System

Grading scales used by Ghanaian HEIs were traditionally patterned after the British classifications scheme, but almost all universities now use variations of U.S.-style 0-100 and A to F grading scales.

Universities usually use a course numbering system that labels undergraduate courses as 100, 200, 300, and 400-level courses, depending on the year of study (first year, second year, and so on). Akin to the U.S. credit system, one full-time academic year usually represents 30 to 36 credit units.

### Bachelor's Degree

Bachelor's degrees in standard academic disciplines are four years in length (12+4), whereas bachelor's programs in professional fields, like architecture, medicine, or dentistry, are five or six years in length after the WASSCE. Curricula are specialized with few, if any, general education requirements. Programs commonly include a final project, thesis, "long essay", or "special paper" in the final year. Typical credential names include the Bachelor of Arts, Bachelor of Commerce, Bachelor of Science, and so on.

### Postgraduate Diploma (PGD)

Postgraduate diplomas are one-year programs after the bachelor's degree designed for further specialization in professionally oriented disciplines. PGDs are primarily intended to give access to employment rather than further study.

### Master's Degree

Admission into master's programs is based on a bachelor's degree with sufficiently high grades in a related field. Programs are between one and two years in length; thesis and non-thesis options do exist, with the latter typically requiring more coursework. Common credential names include the Master of Arts and Master of Science. The Master of Philosophy is a special degree typically earned after completion of a rigorous two-year, research-oriented program.

### Doctor of Philosophy

A terminal research degree, the Doctor of Philosophy is Ghana's highest academic qualification. While the occasional structured program does exist, doctoral degrees are usually earned by research and defense of a dissertation without further coursework. Admission is based on a relevant master's degree and academic potential.

### Medical Education

Ghana's medical system has evolved significantly in recent years – whereas critical medical care was still routinely provided by visiting European medical doctors just a few decades ago, Ghana has now built up a more effective domestic health care system, even though the emigration of trained physicians remains high and severe shortages of physicians persist, particularly outside of metropolitan areas.

Medical training takes six years after the WASSCE and concludes with the awarding of the Bachelor of Medicine and Bachelor of Surgery (MB ChB). The most common curriculum offered by Ghanaian universities is divided into two phases: In the first phase, students complete one year of pre-medical sciences and two years of basic medical and paraclinical studies before they are awarded a bachelor's degree in medical sciences *en passant*. The second phase comprises three years of clinical studies. Admission is extremely competitive, with only the most qualified students gaining admission.

In addition, there is a graduate entry medical program, which is a four-year integrated program for holders of previous bachelor's degrees in fields like pharmacy, nursing, or natural sciences (biology, chemistry, physics, etc). Graduates of both types of programs must complete a mandatory two-year internship ("housemanship") before being able to register as physicians with the Ghana Medical and Dental Council. Graduate medical education is provided by the Ghana College of Physicians and Surgeons and usually involves another two to four years of clinical studies, depending on the specialty.

### Teacher Education

Until recently, it was possible to teach at the elementary and junior secondary level (basic education) in Ghana on the basis of a three-year Diploma in Basic Education. However, the government, in its effort to raise teaching standards, is currently implementing major reforms in teacher education and has mandated that all teachers must have a four-year bachelor's degree. In 2018, Ghana's President, Addo Dankwa Akufo-Addo, announced that all colleges of education, the main providers of DBE programs, "will be upgraded to University Colleges and will offer a four-year Bachelor of Education degree starting in the 2018-19 academic year".

Teachers are also now required to obtain a formal license from the Ministry of Education (MOE) and complete one-year of assessed, in-service teaching training before being granted a teaching permit.

## WES DOCUMENTATION REQUIREMENTS:

### Secondary Education

- Final Examination Results (for example BECE, WASSCE) – sent directly by the WAEC
- WAEC Scratch Card or Electronic PIN Code – submitted by applicant (for more information, see the WES website)

### Higher Education

- Photocopy of degree certificate – submitted by the applicant
- Academic Transcript – sent directly by the institution attended
- For completed doctoral programs, an official letter confirming the conferral of the degree – sent directly by the institution

## SUMMARY OF SUB-SECTORS

According to the 2022 IIE Open Doors Report, Ghanaian students in the U.S. numbered 1,078 undergraduate, 2,984 graduate, 40 non-degree, and 814 OPT.

### Top Areas of Study for Ghanaian Students

Major Field of Specialization	2020/2021
Business and Management	25%
Engineering	15%
Fine and Applied Arts	9%
Health Professions	4%
Humanities	15%
Math/Computer Science	15%
Physical and Life Sciences	15%
Other Fields of Study	2%

## OPPORTUNITIES

Ghana is now the number two country for sending students from the sub-Saharan African region to the United States. Ghana is among the top 25 countries that sends graduate students abroad for further education. The free senior high school policy currently deployed in Ghana has created an opportunity for increased undergraduate interest in getting educated outside of Ghana.

Ghanaian students study at colleges and universities across all 50 states in the U.S. and share their success stories with contacts in Ghana, which increases Ghanaian students' interest to study abroad.

## DIGITAL MARKETING STRATEGIES

Most students in Ghana use social media platforms. Social media has gained a lot of interest in the young population of the country and has become the go-to tool for all sorts of information. The most popular social media sites for students in Ghana are Facebook, Twitter, Instagram, LinkedIn, WhatsApp, We Chat, and Snapchat. Platforms used to search for job opportunities include [www.jobbermanghana.com](http://www.jobbermanghana.com), [www.jobwebghana.com](http://www.jobwebghana.com), <https://www.nyu.edu/> and <https://buzzghana.com/>.

To conduct research, students in Ghana mostly use the Google search engine. To stream videos, Ghanaian students use YouTube, Instagram, and Facebook.

Education institutions from the U.S. and other countries use LinkedIn, Facebook, email, Google Meet, WhatsApp, Zoom, and webinars to reach students in Ghana. Students and parents in Ghana receive information on educational opportunities via student seminars, EducationUSA counseling, and education fairs. It is recommended that U.S. study state consortia and education institutions focus on digital education and accessibility for Ghanaian students.

## EVENTS

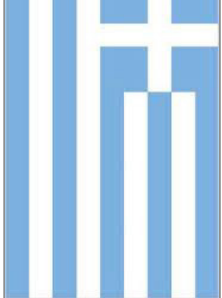
- Worldview Education Fairs - Accra, Ghana, October 14, 2023: <https://www.worldviewevents.com/>
- Various Embassies' education fairs

## RESOURCES

- U.S. Commercial Service- Ghana: <https://trade.gov/ghana>
- EducationUSA/Fulbright: <https://gh.usembassy.gov/education-culture/educationusa-center/>
- World Education News and Review: <https://wenr.wes.org/2019/04/education-in-ghana>
- UHY Articles: <https://www.uhy.com/the-worlds-fastest-growing-middle-class/>

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# GREECE

<b>Capital:</b>	Athens
<b>Population:</b>	10.5 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$314.4 billion (2021 est., in 2017 dollars)
<b>Currency:</b>	Euro
<b>Language:</b>	Greek

## UNESCO Student Mobility Number:

Greece has 40,395 students studying abroad according to UNESCO.

## CIA World Factbook:

24.8% of the Greek population is under 25 years of age.

## OVERVIEW

Greece, per its Constitution, offers free education as a right to all citizens. Education is compulsory for all children between the ages of 4 and 15 and, as of September 2021, pre-school education starting at the age of 4 is now mandatory for all children.

The Ministry of Education and Religious Affairs administers the budget, develops the curriculum, and oversees all schools in the Greek public system, as well as managing examinations including the Panhellenic exams that determine which public university students can attend based on performance.

The Greek education system is divided into Early Education and Care for children up to the age of 6, Primary Education for ages 6-12 and Secondary Education for ages 12-18. Secondary Education includes what is traditionally known as middle and high school in the United States, respectively referred to as Gymnasium and Lyceum in Greece. After age 15, students can either pursue vocational tracks or attend high school. Students attending high school can pursue Higher Education, which includes university-level education. Most students in Greece attend public schools of all levels, for which there are no tuition fees, while less than 10% of the student population enrolls in private schools.

The pandemic has dramatically impacted student mobility throughout the world. In 2021-2022, according to the Institute of International Education (IIE) Open Doors survey, 2,407 Greek students studied at U.S. institutions, a 6.7% increase compared to the previous year which saw dramatic low figures due to the pandemic. Of the total Greek students attending U.S. educational institutions, 1,121 attended graduate programs, 761 students attended undergraduate programs, and the remaining 525 participated in non-Degree programs. Most Greek students pursued the fields of science, economics and law in the U.S.

According to the Institute of International Education (IHR), Greece ranked 9th as a destination for U.S. students in the 2021-2022 academic year, with 418 U.S. students attending Greek institutions. Italy attracted 2,193 U.S. students, followed by 2,089 in Spain, 1,612 in Britain, and 1025 in France. This figure is down considerably from years past; Greece attracted 6000 American students in 2018-2019 and over 5,000 students in 2017-2018.

## U.S.-Greece Educational Partnerships

In December 2019 the Greek Ministry of Education and the U.S. Institute of International Education inaugurated an academic cooperation program between Greece and the United States to promote bilateral cooperation programs among higher education institutions. After a long delay caused by the pandemic, in November 2022 Greece welcomed representatives from 30 American universities including Yale, Harvard, Princeton, Cornell, Brown, Stockton, and Johns Hopkins under the banner of the Pharos Summit 2022. The event brought together representatives from U.S. and Greek higher educational institutions to explore areas of collaboration, establish partnerships and increase both academic and research student mobility between the two countries. The program laid the foundation for over a hundred agreements and will result in increased academic exchanges and partnerships between these institutions. The U.S. Embassy to Greece supported the visit, which showcases the United States' strategic engagement in international education, including through the Fulbright and Gilman Programs, to support increased student mobility.

As a result of the Pharos Summit 2022, Columbia University will launch an International Education Center in Athens in September 2023, while the postgraduate student exchange programs between the National and Kapodistrian University of Athens (EKPA) and Yale University will most likely launch within the current academic year. A cornerstone of the partnership with Yale University is that Greek participants will be exempt from paying tuition fees. As part of this new partnership, EKPA postgraduate and doctoral students will be able to take one-semester or one-year courses at Yale's science, medical and environmental schools, which will count toward their degree.

The U.S. Commercial Service in Greece expects many partnerships and continued collaboration to come from this program.

## SUB-SECTORS

### Higher Education - Universities & Colleges

Higher education refers to university level education. In Greece, public higher education is free, and the state supervises and finances 25 High Education Institutions (HEI) with two parallel sectors: the university sector and the technological sector (TEIs).

The university sector includes majors such as Shipping, Tourism, Economics, Philosophy, Law, and Medicine, among other traditional disciplines. Most majors are four-year degrees, while Polytechnics require five years of study and Medicine takes six years. Additionally, while not universities, there are schools that provide Diploma degrees known as IEK which typically take 2-3 years.

Private universities in Greece are not considered part of this "university" system. This creates a disadvantage as the system does not allow for equivalence for private institution degree holders despite the many private programs affiliated with EU universities. The American College of Greece (ACG) is the oldest American-accredited college in Europe and the largest private college in Greece.

TEIs focus on practical and professional skills, in areas such as agriculture, healthcare, applied

technology, management, and art and design. There are 15 TELs in Greece.

## Secondary Education

Secondary education includes both private and public middle and high school level programs. As with university education, public middle and high schools are free. There are 3,069 public high schools and 159 private high schools in Greece. There are private middle schools as well, which often provide options for the expat community or the very wealthy. There are a few schools with U.S. influences, such as Athens College (Hellenic American Educational Foundation) and the American College of Greece. There also is the American Community School. Additionally, British and French curricula can be found as well. Such international schools often have two track programming to allow for students to be able to qualify and pass examinations required to return to the Greek system, while also preparing them to attend universities abroad.

## Online Programs

The Greek Open University (EAP) was founded in 1997 and enables local students to participate in graduate and/or undergraduate programs through distance learning. As in other parts of the world, the pandemic compelled Greek educational institutions to implement online and distance e-learning platforms, changing the habits of Greek students. Platforms like Coursera and universities like Thunderbird have grown in popularity. This shift may present opportunities for U.S. institutions offering summer courses or online classes that could be appealing to Greek students.

## OPPORTUNITIES

For over 100 years, the United States and Greece have engaged in a cross-cultural educational exchange and cooperation. English is the first foreign language in the Greek Education system and is taught in private kindergartens and primary schools starting in first grade. Greeks are receptive to education opportunities abroad given access to universities in the European Union. Until Brexit, the U.K. had been the preferred destination for Greek higher education students, attracting over 11,000 Greek students a year. Other popular destinations include Italy and Germany.

As a non-E.U. destination, the U.S. is prominent. Greeks have a strong affinity to the United States and if finances allow, families are happy to send their children to universities in the United States. While the economic crisis has negatively affected many, it has allowed for a small population to send their children out of the country, even to expensive foreign universities, in search of better employment prospects. According to historians, there have been three major waves of immigration from Greece to the United States, with the most recent wave following the financial crisis.

As the U.S. will never be the most economical destination, best prospects would likely fall in the following niche areas:

- Short term intensive English language training programs
- E-learning programs from U.S. universities that could include both degrees and certificate programs (i.e. full-degree programs or certificate programs in areas that could include digital marketing, tourism, business, IT skill building, program management and

- more)
- Traditional undergraduate and graduate programs that focus on areas with high marketability and future job prospects
- Programs that have work-study elements or follow-on job possibilities

## How U.S. Commercial Service Can Help

Commercial Service Athens can assist U.S. universities and education related firms in entering the Greek market through identifying potential partners, connecting U.S. entities with local stakeholders, and arranging virtual and physical platforms for promotion. In the past, CS Athens has participated in two virtual educational fairs (VEF) with Albania, Romania, Serbia, and Slovenia. Both fairs brought university representatives, educational consultants, and advisors from all over the region who were interested in learning more about programs in the United States.

In Greece, studying abroad entails considerable effort and research by the student, since there are no consulting agencies to assist. Fulbright Greece has an EducationUSA office that offers support to students interested in learning more about studying in the United States and there are 4 Embassy-sponsored American spaces in Greece providing access to information.

## DIGITAL MARKETING STRATEGIES

- The most popular social media sites used in Greece are Facebook and Instagram. Recently, there has been an increase of TikTok users.
- The most common platform used by schools to connect with their students is WebEx. Private schools also use Microsoft Teams, Blackboard, ManageBac and Zoom. Greek students use Google for their research, but private institutions provide their students with access to platforms such as Euromonitor, EBSCO, Statista, and Economist. Private institutions maintain private digital libraries, also valuable during research.
- Greek public universities use an Integrated Library System and are connected in a common database such as Online Public Access Catalogue (OPAC) which allows access to digital libraries abroad for more advanced searches.
- Job opportunities are announced online through LinkedIn and KARIERA - a Greek job search platform.
- The most popular platforms for streaming videos are YouTube and Netflix.
- Schools advertise their programs through regular TV ads and through social media. Additionally, some schools organize open campus days.

## EVENTS

There are no major education fairs in Greece. While many other industry shows have education sections with university participation, and while many private schools and Embassies organize forums that allow matchmaking between local students and foreign universities, there is a need and an opportunity for a larger platform that could provide information and allow Greek students to connect with foreign universities. Fulbright has conducted exceptional work, but there is room for private sector players to further support the development of the sector.

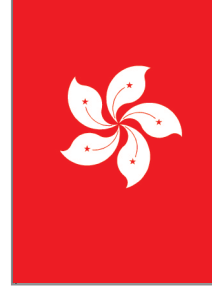
## RESOURCES

There are many educational institutions in Greece that share an American connection, some examples of U.S. affiliated schools and educational programs in Greece are:

- Fulbright Foundation in Greece: <https://www.fulbright.gr/en/>
- American School of Classical Studies at Athens: <https://www.ascsa.edu.gr/>
- The American College of Greece: <https://www.acg.edu/>
- American Farm School/Thessaloniki: <https://www.afs.edu.gr/afs-at-a-glance/>
- Anatolia College/American College of Thessaloniki: <https://www.act.edu/>
- College Year in Athens: <https://cyathens.org/>
- Hellenic-American Educational Foundation (Athens College-Psychiko College): <https://www.athenscollege.edu.gr/en>
- Hellenic American University: <https://hauniv.edu/>
- Pinewood-American International School of Thessaloniki: <https://www.pinewood.gr/>
- American Community Schools (ACS): <https://www.acs.gr/>
- New York University in Athens: <https://www.nyu.edu/research/provosts-global-research-initiatives/research-centers-faculty-graduate-students/nyu-in-athens.html>
- Princeton Athens Center: <https://hellenic.princeton.edu/princeton-athens-center>
- Harvard Center for Hellenic Studies: <https://chs.harvard.edu/>
- Webster University in Athens: <https://www.webster.edu.gr/>
- U.S. Embassy and Consulate in Greece: <https://gr.usembassy.gov/>

## U.S. COMMERCIAL SERVICE CONTACT

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# HONG KONG

<b>Capital:</b>	Hong Kong
<b>Population:</b>	7.3 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$444.6 billion (2021 est., in 2017 dollars)
<b>Currency:</b>	Hong Kong dollars (HKD)
<b>Language:</b>	Cantonese, English, Mandarin, or other Chinese dialects

### UNESCO Student Mobility Number:

Hong Kong has 35,361 students studying abroad according to UNESCO.

### CIA World Factbook:

21.62% of the Hong Kong population is under 25 years of age.

## OVERVIEW

Hong Kong had a total of 5,848 students studying in the United States during the 2021-2022 academic year, with 56.3% of these students at the undergraduate level. The slight decrease in the number of Hong Kong students from the previous year is mainly due to the COVID-19 pandemic and concerns about public safety in the United States.

However, Hong Kong parents have a history of sending their children abroad, and this trend is likely to increase in the near term. Interest in overseas education by parents is partly due to better work prospects that come with a U.S. education. In addition, as the university selection process in Hong Kong is extremely competitive, it has led some students to seek overseas education outside of Hong Kong, and the U.S. is one of the major study destinations and a desirable place for local students to study. Many alumni of U.S. universities and boarding schools come from Hong Kong.

The Hong Kong Government has invested many resources to promote STEM education and boost the talent base in technology, especially fintech. Moreover, a government organization, Cyberport, has had past experiences partnering with MIT and the University of Chicago Booth School of Business to host Fintech Bootcamps for local university students. The Hong Kong government and various institutions in Hong Kong are open for future collaboration with U.S. education technology companies and universities.

The U.S. Commercial Service in Hong Kong has established good relationships with local agents and high school counselors. U.S. education institutions can contact the U.S. Commercial Service in Hong Kong to build-out their base of education partners or recruit students in this region.

## SUB-SECTORS

### Undergraduate

There is high demand among Hong Kong students to study in U.S. four-year undergraduate programs. 56.3% of the 5,848 Hong Kong students studying in the United States during the

2021-2022 academic year were pursuing undergraduate studies. Some of the popular majors include business, engineering, and the humanities. An increasing number of students are also pursuing degrees in journalism, media studies, and computer science in the U.S.

### Community College

There is an emerging market for two-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, particularly those schools with established paths to transfer to top tier four-year colleges in the U.S.

### Graduate Education

Compared to undergraduate programs and secondary education, demand by local students for U.S. graduate education is comparatively lower. During the academic year 2021-2022, 26% of Hong Kong students studying in U.S. were graduate students. Outreach to these prospective students is difficult because many of them do their own independent research for schools online and apply directly, without working with education recruitment agents or attending seminars to learn more about graduate education programs.

### Secondary Education

Demand has been growing tremendously for Hong Kong parents to find opportunities for their children to study in U.S. boarding schools, starting at an earlier age than was historically the case (Grade 7 or 8).

### Online Programs

There is high demand for online programs, especially since the COVID-19 period when social distancing measures were implemented. Hong Kong vocational schools, professional institutions, and extension schools of local universities are very interested in collaborating with U.S. universities to provide online bachelors, graduate, and executive programs to local students and professionals in the industry. Hybrid programs are also another opportunity for cooperation between local and U.S. schools.

### Research and Development

The Hong Kong government has introduced several policies and allocated over one hundred billion Hong Kong dollars to support a series of measures for research and development and innovations in technology. There are also opportunities for collaborations with U.S. universities. In 2019, Hong Kong Science & Technology University joined force with Johns Hopkins, Harvard, Standard Medical School, and University College London to set up the city's first international research center on dementia and other neurodegenerative diseases.

### Professional Training Services

There is strong demand for professional training or short-term executive education programs from the extension schools of local universities, Hong Kong vocational schools, government-funded academies, and organizations, especially in the fields of digital transformation, innovation, financial technology, AI, blockchain and data science.

## Education Technology

There is growing demand for education technology from local high schools, as the Hong Kong government has announced that it will deploy U.S. \$64 million over the next three years to local high schools to procure education-related technologies, course materials, and trainings programs to promote STEM education.

## OPPORTUNITIES

There are opportunities for entry into Hong Kong markets at virtually every level of education. There is growing interest in U.S. boarding schools for younger children, as well as demand for higher education in the U.S. Interest in U.S. undergraduate programs remains high, with an additional growing market for U.S. community colleges, especially those with potential for entry into more traditional four-year colleges upon graduation. Interest in graduate programs is comparably lower, due to the difficulty in marketing to students who primarily research such programs independently. Due to the COVID-19 pandemic, there is additional growing interest in online programs and virtual education technology.

## DIGITAL MARKETING STRATEGIES

U.S. education institutions can promote their programs to local prospective students through digital marketing. Some of the most used and popular social media platforms for Hong Kong students include Facebook, LinkedIn, YouTube, and Instagram. When students research information or search for job opportunities or overseas study programs, they use Google as a search engine, as well as LinkedIn, Efinancial careers, Indeed.com and Jobsdb.com, which are popular job searching platforms in Hong Kong.

Students and parents usually receive education opportunities via Facebook, email, SMS messages, and e-newsletters. It is recommended that U.S. education institutions partner with local education agents and high school counselors to organize education webinars and promote their program on Facebook and Instagram. U.S. schools can also consider publishing stories that highlight well-known alumni, as their accomplishments and testimonials by Hong Kong alumni will attract local parents and students. Short videos or photos to introduce your school campus and program also gains positive attention.

## 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) - July 8-9,2023:** <https://www.hkie.com.hk/en/>
- **Hong Kong Virtual Education Fairs (4 times annually)** - Organized by the U.S. Commercial Service office in Hong Kong. Participating U.S. academic institutions come from the following segments:
  - U.S. Undergraduate/Four-Year Colleges
  - U.S. Community Colleges
  - U.S. Summer Study Abroad Programs
  - U.S. Technical and Vocational Colleges

## RESOURCES

- U.S. Commercial Service - Hong Kong: <https://www.trade.gov/hong-kong>
- EducationUSA: <https://educationusa.state.gov/centers/us-consulate-hong-kong-and-macau>

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# HUNGARY

<b>Capital:</b>	Budapest
<b>Population:</b>	9.67 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	326.1 billion (2021 est., in 2017 dollars)
<b>Currency:</b>	Hungarian Forint (HUF)
<b>Language:</b>	Hungarian

## UNESCO Student Mobility Number

Hungary has 13,706 students studying abroad according to UNESCO.

## CIA World Factbook

24.97% of the Hungarian population is under 25 years old.

## OVERVIEW

Education in Hungary follows a more traditional approach than in other European countries. Major difference is the frontal education with no or limited teamwork, high number of students per class, overwhelmed students, and teachers in the public education. Parents who are not pleased with quality of public education tend to enroll their kids to private or church-funded schools so the number of these is increasing in the public education system. Private schools charge monthly tuition to families which can range between USD 100-400 monthly per student. This makes an extra financial burden on families' budget given the average gross salary is USD 750 in Hungary. Church schools usually incorporate mandatory religious elements into their curricula.

Hungarian education has many challenges to face in the coming years, according to the OECD. Vocational qualifications are less common in Hungary, despite its large adult population with upper secondary qualifications, less than 25% of first-time upper secondary graduates earned a vocational qualification compared to 40% on average across OECD countries. Tertiary education among younger adults remains lower in Hungary than the OECD average, which is at 31% compared to 44%. Tertiary admission is based on a combination of three factors: subject grade points from secondary schools, grade points from the final examinations and socio-economic status and/or personal achievements. Extra points can be earned by language exams. In 2019, Hungary invested a total of USD 8,738 per student on primary to tertiary education compared to USD 11,990 on average across OECD countries. This represents 3.8% of the National GDP, compared to 4.9% on average across OECD countries.

Key challenges in the Hungarian education system are the aging teachers' society, low salaries and as a result lack of teachers mostly in natural sciences. Priorities include improving secondary and tertiary education in regard with content, curriculum and have content accessible on mobile devices. Support of coordinated digitalization of traditional textbooks and education materials would also be vital as well as widening accessibility of education for disadvantaged student populations and students with disabilities.

## SUB-SECTORS

### Higher Education

According to the 2022 Open Doors Report, the United States hosted 948,519 international students in its schools in the 2021/2022 school year, a modest uptick of 3.77% over the previous year. There were 705 international students from Hungary at U.S. higher education institutions in 2021/2022 which is an 8% increase compared to the previous academic year. In 2019, 724 students from Hungary studied in the United States, while the following year saw a dip to 653 students.

Hungarian tertiary education has been representing academic excellence for more than 650 years. There are 28 state-funded, 11 privately funded and 26 church-funded universities for students to choose from. As a result of Hungarian institutions' internationalization process, students can find what best suits their interests - institutions offer more than 500 courses in English, German, French and other languages. Most students tend to learn English as the first foreign language, followed by German, Spanish, French and Russian, Chinese, and Japanese have become popular languages in the recent past. Additionally, students have a wide range of study fields to choose from, including Agricultural Science; Computer Science and Information Technology; Legal Science; Economic Science; Medical and Health Science; Arts, Arts and Humanities, Arts Education; Engineering Science; Social Science; Teacher Training; Sport Science; Natural Science.

Higher education studies are offered in three training cycles (Bachelor course, Master course and Doctoral course). The number of foreign full-time university students in Hungary showed a steady increase between 2009 and 2020 with their number slightly dropping in the schoolyear of 2020/2021. In that year, over 32,000 international students were enrolled at Hungarian universities. By the schoolyear of 2021/2022, their number increased to 34,800. 20% of the applicants applied for economics courses, 15% for technical fields, 10% for IT, and 9.8% for humanities. As in previous years, the proportion of first-year students in natural science courses was the highest, followed by arts and almost the same proportion in law and social sciences. However, it is becoming more and more challenging to get enrolled into art courses. Hungary is home to several internationally recognized higher educational institutions. According to the "Times Higher Education World University Ranking", in 2022, the research-led medical school, Semmelweis University located in Budapest achieved the highest score of all higher educational institutions in the country followed by University of Szeged and Eötvös Lóránd University of Budapest.

Key objective of higher education includes active support of students to successfully complete trainings with special focus to Roma students or students with impairments, disabilities. Education system should ensure equal opportunities, social advancement and broad access to female students who may have families with nursing areas, day-care etc.

### Education Technology

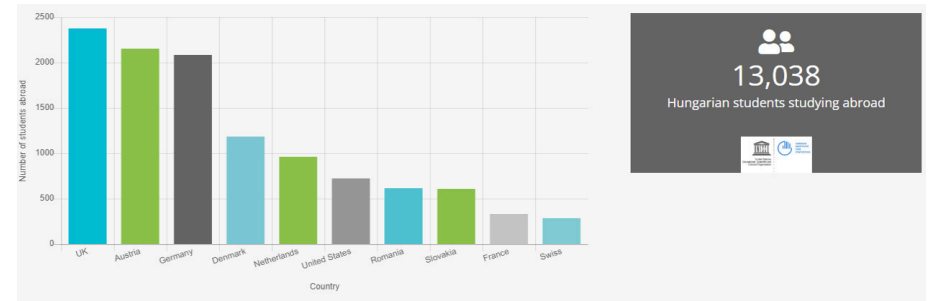
In Hungary, most universities use many platforms for distance learning. The most popular platform for distance learning is Microsoft Teams. In higher education, Google Slides, PowerPoint and Prezi are regularly used applications for presentations. Another application students use to study is Quizlet. Similarly, Zanza.tv is a very popular platform among students in secondary

schools; it helps them prepare for their final exams in an interactive way. Digitalization may facilitate access of disadvantaged student population.

Educational applications and digital solutions for learning are also becoming more popular. There are 57 EdTech startups in Hungary, for example there are e-book applications, English language learning apps, school management, and other online tutoring apps.

## OPPORTUNITIES

In the 2021/2022 school year, 12,275 Hungarian students chose to study abroad, but the United States was only the 6th most popular study abroad destination for Hungarian students.



\*When the data was collected, 'United States' bar chart represented 727 Hungarian students. (Source: <https://www.educationfair.nl/market-reports/europe/hungary/>)

EducationUSA/Fulbright Hungary promotes education between Hungary and the U.S. by means of educational and cultural exchange. The Fulbright Commission for Educational Exchange has been registered in Hungary as a non-profit public interest educational foundation. It is open to all the fields of arts and sciences.

The program is financed mostly by the U.S. government, as well as the partner governments and by private contributions and in-kind support. Fulbright offers scholarships on a broad scale. There are application opportunities for high school students through the Flex program, graduate students, teachers, researchers and even for secondary educators and students as well.

Hungary is also part of the Erasmus+ Program. Erasmus+ Program is a long-standing exchange opportunity for students. The Erasmus+ program aims to help European students become active citizens, with the skills, knowledge, and experience to tackle the challenges facing our society, both now and in the years to come. In 2021 Hungary spent EUR 22 million on Erasmus+ Program and 22,622 students participated in it. Main focuses were on environment and climate change, digital transformation, inclusion and diversity. Erasmus+ programs will not be available for private university students in Hungary based on a recent decision of the European Commission in 2023.

The Campus Mundi program supports the development of the international competitiveness of



the international competitiveness of Hungarian higher education in the period between 2016-2022 with HUF 9.2 billion. The program supports student mobility and contributes to increasing the international role and recognition of higher education institutions.

## DIGITAL MARKETING STRATEGIES

In 2021, over 90% of Hungarians were internet users, with social media usage being one of the most popular online activities. Key platforms are Facebook and Messenger, Instagram, YouTube, and TikTok. The largest user group for social media are those under 24 years old. This age group also uses Facebook to the greatest extent, as the younger generation likes to have a separate community on social media. The most popular social media sites among the 18-24 age group are Instagram and TikTok.

Aside from social media, students also use the internet to aid in job searching. The three most popular job searching websites are Profession.hu, Jobline.hu and CV-Online.hu. LinkedIn also showed increasing popularity for searching jobs online in 2022 among the 25-34 age group. In terms of accessing information online, Google was the most important search engine in Hungary by market share.

Netflix and HBO GO are the most widely used streaming websites in Hungary. YouTube is also very popular among young people for streaming videos and sharing content online.

EDUCATIO is Hungary's largest education expo. The aim of founding the EDUCATIO International Education Exhibition was to answer questions regarding higher education. Its goal is to connect participants of education (national and international institutions of higher education, course book publishers, language schools, and vocational training centers) with people who are interested in them (e.g., students, teachers, and parents). The best months of the year to recruit students at educational fairs are January through March and September through November.

The Ministry of Innovation and Technology through the Education Office is an important source of information regarding educational opportunities for students and parents in Hungary. The Education Office supervises the operation of the national recruitment system that guarantees all opportunities and considers all applications. (<https://www.felvi.hu/>). Additionally, the HVG Job Fair is also an important source of information on educational opportunities.

## EVENTS

- HVG Job Fair - April 26-28, 2023: <https://allasborze.jobline.hu/latogatoknak/>
- EDUCATIO Education Fair (annual event): <https://www.educatioexpo.hu/>

## RESOURCES

- U.S. Commercial Service - Hungary: <https://www.trade.gov/hungary>
- Fulbright Commission: <http://www.fulbright.hu/>
- Tempus Public Foundation - <https://tka.hu/english>
- EdTech Startups in Hungary: <https://tracxn.com/explore/EdTech-Startups-in-Hungary>
- Study Hungary – Higher Education in Hungary: <http://studyinhungary.hu/study-in-hungary/menu/studying-in-hungary/higher-education-in-hungary.html>

- OECD -- Hungary: Education at a Glance 2022 - [https://gpseducation.oecd.org/Content/EAGCountryNotes/EAG2022\\_Hungary](https://gpseducation.oecd.org/Content/EAGCountryNotes/EAG2022_Hungary).
- Hungarian Central Statistical Office – Educational Data - <https://www.ksh.hu/docs/hun/xftp/idoszaki/oktat/oktatas1920/index.html#35ezerreltbbentanulnakafelsoktatsiintzmnyeknappalikipzsein>

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# INDIA

<b>Capital:</b>	New Delhi
<b>Population:</b>	1.4 billion (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$9.279 trillion (2021 est., in 2017 dollars)
<b>Currency:</b>	Indian rupees (INR)
<b>Language:</b>	Hindi

## UNESCO Student Mobility Number

India has 516,238 students studying abroad according to UNESCO.

## CIA World Factbook

43.82% of the Indian population is under 25 years old.

## OVERVIEW

India has one of the largest higher education systems in the world, behind only China and the United States, and emphasis on higher education in India has grown significantly in the past two decades. India is also one of the fastest growing sources for outbound students, outpacing China in terms of annual growth prior to the pandemic. Even though India’s student recruitment market is still maturing, it is one of the fastest growing markets in the world, and international recruitment specialists anticipate a strong recovery following the COVID-19 global pandemic.

Per 2022 University Grants Commission (UGC) statistics, there are a total of 1,072 universities in the country, including 460 state universities, 128 deemed to be universities (a status of autonomy granted to high performing institutes and universities by the Department of Higher Education), 54 central universities (established by the Department of Higher Education), and 430 private universities. India has 161 Institutes of National Importance, a status conferred on premier public Higher Education Institutions (HEIs) that receive special recognition and funding from the government. In addition, the Institutions of Eminence guidelines were launched to empower HEIs and assist them in becoming world-class teaching and research institutions. Twenty institutions (10 private and 10 public) are now a part of this exclusive group of Institutions of Eminence. Together they offer a wide range of degree and diploma programs.

The UGC is the central regulator, providing grants, coordination, and standards for institutions of higher education. The higher education sector in India can be broadly 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. The huge supply and demand gap, participation of many private players, growth of the IT sector, demand for a skilled workforce, increasing FDI, disruptive innovation, and online education, have in combination led to significant growth in this sector.

In 2020, the Indian government announced the National Education Policy designed to transform the education sector, making it more experiential and flexible. Indian universities are being encouraged to offer multidisciplinary and holistic education across sciences, social sciences, arts, humanities, and sports.

Presently, degrees offered by foreign universities are not recognized by the UGC, and most foreign universities have partnered with top Indian private or autonomous HEIs to offer twinning or dual-degree programs. In April 2022, the UGC approved regulations to ease academic collaboration between Indian and foreign HEIs to offer these programs as well as to enhance research collaboration. Through these new regulations, UGC encourages student and faculty mobility with the aim of helping Indian HEIs achieve higher global academic rankings. The regulations level the field for all public and private UGC-recognized universities to collaborate with foreign HEIs to offer premium programs to Indian students.

## SUB-SECTORS

### Secondary Education

The Indian market for high school and other U.S. secondary education options remains underdeveloped. Cultural factors, along with burgeoning numbers of international schools in India, are among the largest obstacles that limit demand.

### Higher Education

#### Study Abroad

Per the annual Open Doors Report in the 2021–2022 academic year, a total of 199,182 Indian students were studying in the United States. This includes students at the undergraduate and graduate levels, as well as those undertaking Optional Practical Training (OPT) programs. India is the second highest source of students coming to the United States, contributing approximately 21 percent of the total foreign student population. Of this group, 13.8 percent are undergraduate students, 51.2 percent are graduate students, and 34.2 percent are classified as pursuing OPT. During the 2021-2022 academic year, the number of Indian students in the United States increased by 19 percent.

Traditionally, most Indian students studying in the United States choose to pursue Science, Technology, Engineering, and Mathematics (STEM) and business studies. In the 2021-2022 academic year, 36.8 percent of Indian students in the United States studied mathematics and computer science, 39.6 percent chose engineering, and 13.3 percent selected business studies. The study abroad market in India is seeing a steady rise in competition from Canada, the UK, Germany, Australia, and New Zealand. Indian students are choosing to study in these other countries because of flexible visa and other immigration-friendly policies, as well as longer post-study OPT conditions. However, the United States remains the most preferred destination for higher education with significantly more attractive OPT opportunities. The U.S. Mission in India issued over 82,000 students and exchange visitor visas during the summer of 2022, a testament to the fact that Indian students prefer the United States for higher education.

## Undergraduate and Graduate

In 2022, India contributed the second highest number of undergraduate and graduate international students to the United States.

With 50 percent of India's 1.4 billion population under the age of 25, there will be sustained growth in the demand for higher education. According to industry insiders, India lacks the infrastructure to meet this growing demand, creating opportunities for U.S. academic institutions. However, limited scholarships and the increasing cost of U.S. education are major deterrents to U.S. institutions attracting Indian students.

The international undergraduate and graduate recruitment market in India is highly competitive. Indian students consider numerous factors, such as university rankings, OPT options, and financial aid when choosing a university. U.S. schools should underscore niche offerings, campus safety, on-campus employment, and campus life when marketing their programs in India. It is highly recommended that universities leverage their alumni networks in the recruitment process as well, which may include graduates from India.

## Community Colleges

Community colleges, especially those with well-established and reputable transfer programs with four-year U.S. universities, have generated growing interest among Indian students in recent years. These institutions are known for affordable tuition, international immersion programs, and academic credits that are recognized by four-year universities. However, a key drawback for students applying to community colleges is the high rate of visa refusal. Awareness of many of these institutions is still in the nascent stage and will require additional marketing outreach to raise awareness among prospective Indian students. India currently ranks eighth for international students studying at U.S. community colleges.

**Table 1: Indian Students in the U.S. by Academic Level**

Academic Level	2018/19	2019/20	2020/21	2021/22
Undergraduate	24,813	25,032	23,734	27,545
Graduate	90,333	85,160	68,869	102,024
Non-degree	2,238	1,759	1,378	1,425
OPT	84,630	81,173	73,601	68,188

Source: IIE Open Doors Report

## OPPORTUNITIES

### Twining Programs

In a twinning arrangement, students begin their studies in India and finish with a partner

institution overseas. Indian HEIs are finding it easier to establish partnerships with overseas institutions that allow for such agreements. A growing number of Indian academic institutions are showing interest in exploring collaboration with foreign institutions for twinning programs.

### Dual Degree Programs

The National Education Policy allows Indian students to earn a dual degree, one each conferred by an Indian and a foreign HEI. Credits acquired may be counted toward a degree; however, schools must conduct proper due diligence to ensure their agreements are sufficiently robust to facilitate these types of programs. Indian universities are willing to collaborate with foreign institutions offering world class degree programs.

### Curriculum Development

Many Indian universities are seeking to offer more balanced, articulate, and well-structured programs to their students that meet international standards and are open to collaboration with top-ranked foreign universities in the development of academic curricula.

### Student Exchange Programs

Student exchange and specialty short-term programs are of interest to Indian institutions as they enhance cross-cultural exposure and provide a global perspective to students. Exchange students attend courses at overseas universities for intervals of two weeks up to full semesters. Indian schools are receptive to working with U.S. institutions to develop student exchange partnerships, particularly for specialized programs.

### Faculty Exchange Programs

Faculty exchange programs allow faculty members to teach or conduct research at an overseas partner university or college. Indian schools are enthusiastic about collaboration with overseas institutions to develop these exchange programs.

### Joint Research Programs

The purpose of joint research programs is to advance academic, commercial, and social research through collaboration between foreign and Indian universities while providing opportunities for young researchers to hone their skills. Collaboration between Indian universities and industry in India is currently limited. Indian institutions would like to engage with industry in the development of science parks, incubation centers, and technology transfer units. For this reason, Indian universities are interested in exploring opportunities for joint research with international entities.

### Representatives and Recruiters

Several U.S. institutions have appointed representatives in India to conduct promotional and student recruitment activities. The U.S. Commercial Service assists U.S. schools with finding in-country partners to serve as representatives to facilitate expansion in the Indian market.

## Online Programs

According to local industry sources, the market for online education in India is expected to exceed \$11 billion by 2026. The COVID-19 pandemic has accelerated this trend as Indian schools, like other school systems worldwide, are moving to online courses. There is also increased demand for skill development through online certifications on digitized platforms. Several vocational training companies are offering online courses to increase their reach in the Indian market.

## Professional Training Services

The Indian professional training services market includes executive education providers, skilling and training companies, and schools offering courses to mid-career professionals. The professional training market has witnessed robust growth in recent years due to high economic growth, a dominant service sector that contributes more than 50 percent to India's GDP, and the entry of many new foreign companies into the Indian market. U.S. institutions providing professional training services have opportunities to establish strategic alliances with partners in India.

## Service Providers

Non-Indian universities can establish partnerships with Indian education institutions to provide expertise and services such as staff and teacher training, curriculum development, setting up affiliations, and school administration.

## DIGITAL MARKETING STRATEGIES

As the world continues to grapple with the COVID-19 pandemic, an increasing number of global HEIs are using new strategies and digital marketing tools to recruit international students. For example, U.S. universities have been engaging digital media experts and using virtual reality and other 3-D animation tools to provide virtual tours of their campuses. Well-known social media platforms such as Facebook, Instagram, and YouTube, are the top apps being used to recruit international students.

The U.S. Commercial Service has been at the forefront of this burgeoning area, bringing virtual tools to U.S. schools and allowing them to continue recruitment efforts throughout the pandemic. The U.S. Commercial Service offers customized solutions and programs such as Virtual Education Fairs, Virtual Connection Programs, and Virtual Trade Missions. These programs have proven extremely successful to U.S. academic institutions seeking Indian partners to expand their recruiting efforts and facilitating partnerships between U.S. and Indian universities.

## EVENTS

DIDAC India - October 17-19, 2023: <https://didacindia.com/>

The only event in Asia for Educational Resources and Technology-based products & solutions for all levels and sectors of the Education & Skills sector.

## RESOURCES

- University Grants Commission (UGC): <https://www.ugc.ac.in/>
- Ministry of Education (MoE): <https://www.education.gov.in/>
- U.S. Embassy in India: <https://in.usembassy.gov/>

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# INDONESIA

**Capital:** Jakarta  
**Population:** 279.47 million (2023 est.)  
**GDP (Purchasing Power Parity):** \$3.24 trillion (2021 est., in 2017 dollars)  
**Currency:** Indonesian rupiah (IDR)  
**Language:** Bahasa Indonesia (official), English, Dutch, local dialects (of which the most widely spoken is Javanese)

## UNESCO Student Mobility Number

Indonesia has 55,961 students studying abroad according to UNESCO.

## CIA World Factbook

40.63% of the population in Indonesia is under 25 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 277 million people, 87% of whom identify as Muslims, making it the largest Muslim-majority nation on earth. The population is dominated by a young generation; close to 40% of whom are younger than 30 years old. The country's middle class is growing rapidly and is the biggest in Southeast Asia. Indonesia is the world's 10th largest economy in terms of purchasing power parity and a member of the G-20. The 2022 G20 Summit in Bali, Indonesia was the seventeenth meeting of the G20.

Indonesia has compulsory education that lasts 12 years and consists of six years at the elementary level and three each at the middle and high school levels. Islamic, Christian, and Catholic schools are under the responsibility of the Ministry of Religious Affairs. Schools in Indonesia are run either by the government (public) or are private schools. In Indonesia, there are approximately 170,000 primary schools, 40,000 junior secondary schools, and 26,000 high schools. Eighty-four percent of these schools are under the Ministry of Education and Culture and the remaining 16% under the Ministry of Religious Affairs.

Australia is the first choice for Indonesians to study abroad, largely due to geographic proximity, perceived institutional quality, and English-language instruction. More than 13,000 Indonesian students are studying in Australian higher education institutions. Australia, Malaysia, and the U.S. are the top three destinations for Indonesian students who are studying abroad.

## SUB-SECTORS

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 and 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.

During the 2021-2022 academic year, 8,003 students from Indonesia were studying in the U.S. (increase by 6.9% from the previous year. Indonesia is the twenty first 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, the 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 to higher education, while SMK, as a vocational school, prepares its students to work after finishing their schooling, without moving on to 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).

## Top 5 Academic Majors Chosen by Indonesian Students Studying in the U.S.

Year	Business/Management	Engineering	Life Science	Math & Computer Science	Health Professions
2018	28%	17.8%	6.8%	8.5%	1.9%
2019	27.4%	16.7%	6.5%	10%	1.5%
2020	23.4%	15.1%	6.8%	18.9%	1.8%
2021	24%	19.1%	7.1%	12.5%	1.8%
2022	24.9%	16.8%	8.1%	12.2%	2.2%

Source: *Open Doors Report 2022*

## 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 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", "1+3", or "2+2" programs, which enable students to apply credits from their 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.

## Vocation Schools

Vocational schools have increasingly gained the interest of the Indonesian government. 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. The Indonesian government has also invited business leaders to play an expanded role in shaping the curriculum and setting skill standards relevant to the demands of the job market. These business representatives are expected to provide internship opportunities and on-site training programs for both students and teachers.

The government targets 80% of Indonesian people in the productive age group to have partaken in vocational education and training by 2024. Indonesian government issued Presidential Regulation Number 68 of 2022 regarding the Revitalization of Vocational Education and Vocational Training. Vocational education is secondary education that prepares its students to work or establish entrepreneurship in certain fields as well as higher education that readies its students to work or build entrepreneurship with certain applied skills.

Indonesia is enjoying strong economic growth, but investment in vocational education and tertiary training can help the country go from strength. The World Bank and the OECD have both nominated vocational education and training, and the ability to bring Indonesian children into the schooling system at an even younger age, as being the critical drivers of Indonesia's growth in the future.

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 job skills. USAID partners with vocational schools, local governments, and higher education institutions to provide high-quality training on skills such as financial literacy and entrepreneurship. Equipped with the right skills and information, these youth will be able to make more meaningful contributions to the economy.

Examples of some programs that USAID offers to Indonesia related to education:

- Increased Workforce Productivity
- Supporting Secondary Vocational Education
- Supporting Workforce Development
- Supporting Higher Education

In the 2021-2022 school year, there were approximately 5.4 million students in vocational schools in Indonesia. Vocational schools offer three-year courses in technology and engineering, health, arts and crafts, tourism, ICT, agro-business and agro-technology, and business management. In the same academic year, there were about 333,150 teachers in the vocational schools.

The government supports study abroad by Indonesian students through the Indonesia Endowment Fund for Education, abbreviated as LPDP (Lembaga Pengelola Dana Pendidikan).

LPDP is a full-ride scholarship from the Indonesian Ministry of Finance for all Indonesian citizens. LPDP has a vision to be the best regional fund management institution to prepare future leaders and encourage innovation for a prosperous, democratic, and just Indonesia. The LPDP service program consists of scholarships, research funding, and fund management (investment). By 2018, there were 4,000 student awardees to go abroad under the program. In total, there are 20,255 students being funded by LPDP scholarships. In 2019, the Indonesian government funded 50 trillion Rupiah for LPDP's budget.

## DIGITAL MARKETING STRATEGIES

The development of digital marketing in Indonesia continues to increase significantly over time. Indonesia's digital landscape is rapidly growing, with the country's population of over 270 million people and the rapidly rising number of Internet users. The social media penetration rate in Indonesia is 40%. The use of digital media in the education sector in Indonesia has increased tremendously due to COVID-19.

Increased demand for online learning is driving the growth of Indonesia's leading EdTech platforms. The most popular EdTech products offer learning management systems for teacher-student collaboration and interactive classroom tools for hosting live teaching sessions, such as G-Suite for Education, Microsoft for Education, Zoom, Google Classroom, etc.

Cakap, one of the biggest edtech companies in Indonesia, just released an impact report regarding the edtech landscape and how the industry drives the education development through foreign language learning and vocational training. With more than 2 million users, 1 million hours of live learning, and more than 1,000 qualified teachers, Cakap continuously contributes to the development of education in the 34 provinces of Indonesia through the online platform and its cutting-edge curriculum.

EdTech is not accessible to all learners, however, and Indonesia's education system is not well-equipped for quickly scaling up online learning.

There are several social media sites that are very popular among students in Indonesia, such as WhatsApp, Instagram, Twitter, Facebook, LinkedIn, YouTube, TikTok, etc. Despite increasing demand, Indonesia's EdTech sector faces major bottlenecks that prevent it from replicating the level of success seen in other technology sectors and in other countries.

Supply-side constraints include:

- Difficult access to funding
- High marginal costs, particularly to acquire and retain new customers
- A shortage of qualified talent to develop and maintain products

These are coupled with demand-side constraints, including:

- A low willingness to pay from schools and parents
- A lack of digital literacy, particularly on the part of education providers
- Poor digital infrastructure, which limits connectivity in remote regions and slow download speeds across the country

## EVENTS

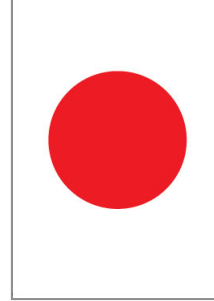
- Indonesia International Education & Training Expo-February 17-20, 2023 (annual event): [ina-educationexpo.co.id](http://ina-educationexpo.co.id)
- World Education Expos - Spring and Fall 2023: <https://worldeducationexpos.com/>
- Global Educational Supplies & Solutions (GESS) Indonesia: September 20-22 2023: <https://www.gessindonesia.com/>

## RESOURCES

- U.S. Commercial Service - Indonesia: <https://trade.gov/indonesia>
- EducationUSA Indonesia: <https://educationusa.state.gov/centers/educationusa-us-embassy-jakarta>
- Ministry of Education and Culture: <https://www.kemdikbud.go.id/>
- American Indonesian Exchange Foundation (AMINEF): <https://www.aminef.or.id/>

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# JAPAN

<b>Capital:</b>	Tokyo
<b>Population:</b>	123.71 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$5.126 trillion (2021 est., in 2017 dollars)
<b>Currency:</b>	Japanese yen
<b>Language:</b>	Japanese

### UNESCO Student Mobility Number:

Japan has 32,365 students studying abroad according to UNESCO.

### CIA World Factbook:

22% of Japan's population is under 24 years old.

## OVERVIEW

During the 2021/22 academic year, Japan ranked as the eleventh largest source of students studying at higher education institutions in the United States. There were 13,449 Japanese students studying in the United States, a 14.1 percent increase from the 2020/21 school year. Due to COVID-19-related travel restrictions, the 2020/21 academic year saw a 32.9 percent decline in Japanese students studying in the United States. The 2021/22 recovery was slow, with fewer Japanese students studying in the United States than pre-pandemic levels. Despite fewer numbers of Japanese students studying abroad, UNESCO's data indicates that 43 percent of them still chose United States as their education destination. Following the United States as the top destination for Japanese study abroad are the United Kingdom, Australia, Germany, and Canada.

From 1994-1998, Japan was the top country of origin for international students in the United States. Since then, Japan has steadily declined down to eleventh place due to various circumstances, including challenging economic conditions and a low birth rate. According to the Ministry of Health, Labour and Welfare, the average yearly salary of a Japanese worker was \$23,646 in 2021. According to Japan Finance Corporation's research ([https://www.jfc.go.jp/n/findings/pdf/kyouikuhi\\_chousa\\_k\\_r03.pdf](https://www.jfc.go.jp/n/findings/pdf/kyouikuhi_chousa_k_r03.pdf)), the average total cost of studying at Japanese universities for one year is JPY 2.3 million (\$20,939). Although the United States remains the most popular destination among Japanese students for study abroad, the cost difference between Japanese universities and American universities is considerably large and not many Japanese households can afford tuition and fees in the United States. The U.S. Department of Commerce estimates that in 2021, Japanese students studying in the United States contributed \$451 million to the U.S. economy.

### Government of Japan Priorities and U.S. Embassy Support

The Government of Japan (GOJ) continues to focus on globalizing Japan's education system. Since 2014, the Ministry of Education, Culture, Sports, Science and Technology (MEXT) has provided funding support to the designated 37 "Top Global Universities" that are driving internationalization. For the list of schools, please refer to the Top Global University Japan's link: <https://tgu.mext.go.jp/en>

In 2018, MEXT and the American Council on Education (ACE), in partnership with the U.S. Embassy and the Institute for Innovative Global Education (IIGE), launched the U.S.-Japan Collaborative Online International Learning (COIL) initiative. This COIL initiative aims to increase global learning experiences through virtual classrooms and platforms where American and Japanese students can work together on subject-specific projects. The COIL method is considered a cost-effective and long-lasting solution in enhancing an international exchange experience and collaborating academically in a virtual environment, even in a post-pandemic environment. Please refer to the ACE website for more details: <https://www.acenet.edu/Programs-Services/Pages/Communities/US-Japan-COIL-Initiative.aspx>

In 2021, Japan's goal of "one device per one student" for compulsory education has been completed under the Global Innovation Gateway for All (GIGA) school project (approximately \$2.2 billion project). The second phase of the GIGA project is specifically targeted at the development of a national ICT education infrastructure. The main pillar of this phase is "cloud by default," i.e., the establishment of high speed and large capacity IT network connections to each school.

In conjunction with the next revision of textbooks in 2024, MEXT aims to implement "digital textbooks" at all elementary schools in Japan. In addition, MEXT is looking to develop a "smart school scheme," in which all academic and administrative data can be more effectively utilized to help students, teachers and parents enter into what is being called "Society 5.0."

GOJ accelerates Educational DX: In January 2022, MEXT (Ministry of Education, Culture, Sports, Science and Technology); the Ministry of Internal Affairs and Communications; and the Ministry of Economy, Trade and Industry and Digital Agency jointly announced a "roadmap" outlining how national and local governments will achieve digital transformation in Japanese education. Under this concept, the GOJ aims to utilize students' learning logs and journals to analyze and assess their knowledge and practical applications of what they have learned, improve teachers' ICT skills, and reduce administrative work hours to complete the groundwork to create an ideal digital educational environment by 2025.

In July 2022, the "Financial Support for Private Universities' Reform" project was announced by MEXT. It's a national project in which the Ministry of Education, Culture, Sports, Science and Technology and the Japan Private School Promotion and Mutual Aid Corporation work together to evaluate, select, and support private universities actively working on school reforms. The GOJ added a new item to the scorecard, digitization of education certificates. Because this criterion has been added to the scorecard, CS Japan anticipates that colleges and universities will implement more digital administrative procedures and increase programs of study in the ICT/digital fields of study. Thus, there is expected to be an increase in interest of study abroad programs that have a technology- or science-focus (e.g., DX and decarbonization).

The TeamUp RoadMap is a web-based, step-by-step guide for creating partnerships in Japan. The U.S. Embassy in Japan initiated the TeamUp campaign to increase student mobility by promoting strategic partnerships between American and Japanese colleges and universities.

## SUB-SECTORS

### Higher Education

Academic Level	2020/21	2021/22	% Total	% Change
Undergraduate	7,243	7,008	52.1	-3.2
Graduate Education	2,678	3,290	24.5	22.9
Non-degree	744	2,017	15.0	171.1
Optional Practical Training	1,120	1,134	8.4	1.3
Japanese students total	11,785	13,449	100	14.1

Community College	2020/21	2021/22	% of Total	% Change
Japan	3,309	3,044	6.2	-8.0
World total	60,170	49,099	100	-12.5

(Source: The Institute of International Education (IIE), 2022 Open Doors Report)

During the 2021/22 academic year, Japan ranked as the eleventh largest source of students studying at higher education institutions in the United States. As for Japanese students studying at community colleges in the United States, Japan has moved up one place since last year and ranks third.

### Secondary Education

Secondary school-organized student trips (lasting 7-10 days) are a Japanese tradition. The educational travel sector has excellent market potential, as demand for overseas school trips will resume in the coming years. Short-term programs have served as teasers, boosting Japanese students' interest in longer-term plans at U.S. universities/colleges.

The market for U.S. boarding schools is also a niche opportunity. A steady number of wealthy families can afford to pay boarding school tuition and prepare their children for further learning. The U.S. Commercial Service in Japan supports U.S. boarding schools through fairs with invited local agents and consultants. The U.S. Commercial Service in Japan recommends partnering with Japanese consultants/agents and participating in educational fairs to expand in Japan effectively.



## Intensive English Programs

Japan is the number one ranked country of origin for students studying in Intensive English Programs in the United States. China, France, and Saudi Arabia follow Japan. (During the 2022 academic year, 4,298 Japanese students participated in Intensive English Programs in the U.S., marking a 17.5 percent decrease from the previous year.)

## Professional Training Services

Although, improving English skills is critically important to Japan's globalization efforts, the allocation of financial resources and incentives have not followed. Japan's decade-long economic stagnation since the 1990s continues to strain organizational funding for professional training; Japanese firms have been cutting costs and funding fewer employees for executive education programs abroad.

## OPPORTUNITIES

The GOJ promotes Japan's globalization efforts, while supporting study abroad programs, human resource development, and people-to-people exchanges. There are opportunities for U.S. universities, particularly in short-term programming, for Japanese students.

It is essential to understand the English proficiency levels of Japanese students. U.S. institutions need to consider relaxed TOEFL score requirements and customize programs for Japanese students. The ability to offer conditional acceptances will be valuable in attracting students. It is also important to note that Japanese and American academic calendars do not align. Short-term (1-2 months study abroad) programs are the most popular in Japan because they make the best use of summer/spring breaks. There are opportunities for American education institutions to market attractive short-term programs to Japanese students, such as demonstrating direct benefits with future career successes gained from studying in the U.S. (e.g., internship and volunteering experiences for enhanced resume building). Japanese universities and education agents can also seek immersion programs of English learning and cultural experiences in sports, music, and dance with U.S. institutions.

U.S. institutions need to customize their programming to meet the Japanese academic calendar which begins in April and ends in March the following year. Japanese students take exams that are given at the end of each grading period. There are typically three breaks in a Japanese academic year, which are the following:

	Summer Break	Winter Break	Spring Break
Higher Education	late July - late Sep.	late Dec. - early Jan.	Feb./March - early April
Secondary Education	late July - late Aug.	late Dec. - early Jan.	late March - early April

Japanese institutions also seek one-semester to one-year study exchange programs with partnering U.S. universities. Establishing partnerships with Japanese universities is an effective

way of entering the Japanese market. Japanese universities continue to seek American universities for establishing bilateral student exchange programs. They recognize the challenges in maintaining balanced, two-way student numbers and are interested in discussing creative ways to foster these exchanges.

Short-term (7-10 days) educational travel programs for high schoolers have great market potential. Many Japanese high schools want unique study abroad programs, such as STEM-related travel, including scientific field trips, sustainable development goals (SDGs) related topics, interaction with faculties/students, and businesses/lab visits. It is strongly recommended to customize the programming to meet a Japanese school's needs (e.g., SDGs, STEM, art, entrepreneurial studies, robotics, music, sports, leadership). Additionally, it helps to prepare information on homestay availability, exchange programs with local U.S. schools, and any other special events that the U.S. host may provide.

## DIGITAL MARKETING STRATEGIES

In 2021, the Ministry of Internal Affairs and Communication (MIC) released a survey report that LINE again ranked the most popular social media in Japan (92.5%), followed by Instagram (48.5%) and Twitter (46.2%). LINE originated from Japan and is widely used for messaging among friends/families. Instagram is one of the fastest-growing applications in Japan. Zoom is often applied in online classes, and Japanese students are familiar with its features. Digital advertising via video content has become more prevalent in Japan. YouTube, Instagram, and TikTok are popular for video streaming among young users. Facebook is popular among people in 20s - 50s and Japanese students routinely visit Facebook searching for educational information.

## EVENTS

- **EducationUSA Virtual Fair Japan** in April, summer, and fall 2023 (TBD): EducationUSA Japan is organizing several virtual fairs in 2023. Depending on the Covid-19 situation in Japan, the EducationUSA Virtual Fair will be held as a hybrid fair. For more information, please visit: <https://educationusa.state.gov/find-event>
- **Kanto Plain College Fair** in fall 2023 (TBD): The fair is the premier private sector international college fair held in Japan. The program consistently attracts more than 100 universities from around the world and mainly targets international school students. For more information visit: <https://sites.google.com/smis.ac.jp/kantoplaincollegefair/menu>
- **Western Japan College Fair** in fall 2023 (TBD): The fair is organized by the Canadian Academy and Osaka International School of Kwansei Gakuin in fall 2023. The fair will feature about 100 Japanese and foreign universities, including American universities, and attract international school students and local high schoolers.
- **The Association of Boarding Schools (TABS)** "TABS Fair in Tokyo" in fall 2023: <https://www.tabs.org/recruitment-events/>
- **The Enrollment Management Association (EMA)** "EMA Fair in Tokyo" in fall 2023: <https://www.enrollment.org/event/recruitment-fair-agent-fair-tokyo>

## RESOURCES

- U.S. Commercial Service – Japan: <https://www.trade.gov/japan>
- Japan Student Services Organization (JASSO): <http://www.jasso.go.jp/en/index.html>
- JAFSA, Japan Network for International Education: <https://www.jafsa.org/en/>

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<sup>1</sup> Source: The Institute of International Education (IIE), Open Doors Report [https://opendoorsdata.org/fact\\_sheets/japan/](https://opendoorsdata.org/fact_sheets/japan/)

<sup>2</sup> Source: The Institute for Information and Communications Policy (IICP) of the Ministry of Internal Affairs and Communications (MIC) [https://www.soumu.go.jp/main\\_content/000765135.pdf](https://www.soumu.go.jp/main_content/000765135.pdf)



# JORDAN

**Capital:** Amman  
**Population:** 11 million (2023 est.)  
**GDP (Purchasing Power Parity):** \$102.82 billion (2021 est., in 2017 dollars)  
**Currency:** Jordanian dinar (JOD)  
**Language:** Arabic (official), English (widely understood among upper and middle classes)

### UNESCO Student Mobility Number:

Jordan has 29,486 students studying abroad according to UNESCO.

### CIA World Factbook:

52.82% of the population in Jordan is under 25 years old.

## OVERVIEW

The Jordanian Ministry of Education is divided into the Ministry of Education (MoE) and the Ministry of Higher Education and Scientific Research (MOHESR). There are no official government scholarship programs for Jordanian students; however, some scholarships are available at U.S. institutions that are only offered to Jordanian applicants.

According to the IIE Open Doors Report for the academic year 2021-2022, the number of Jordanian students studying in the United States was 2,426, showing a modest uptick over the previous year's 2,338 students studying in the United States. Most Jordanian students in the U.S. are studying at the graduate level (47%), while 34% are studying at the undergraduate level, and 19% in non-degree and OPT programs.

## SUB-SECTORS

### Secondary Education (High School)

English is a mandatory course for 10 years in public schools (basic education) and 12 years in private schools (10 years of basic education and 2 years of secondary education). The language of instruction in public schools is Arabic, and the language of instruction in most of the private schools is English.

Jordanian students complete one of the following high school programs:

- Tawjihi (General Secondary Examination) offered in the majority of schools
- International Baccalaureate (IB) offered in a very limited number of private schools
- International General Certification of Secondary Education (IGCSE) offered in some private schools
- Advanced Placement (AP)

Standardized undergraduate admissions testing available in-country are the TOEFL, IELTS, SAT, and ACT exams.

## Higher Education

A Bachelor's degree is earned in four years, except for fields that require additional study, such as medicine, pharmacy, engineering, or law. The language(s) of instruction in universities is Arabic and English. The top fields studied by Jordanian students are medicine, engineering, and law.

Lack of academic-level English skills prevents many potential Jordanian students from gaining admittance to U.S. graduate programs. There is a need to help Jordanian students interested in studying in the United States to better prepare for the necessary entrance examinations. The presence of private high schools and universities is primarily concentrated in the capital, Amman, and Irbid governorate.

In cooperation with the U.S. Embassy in Jordan, Yarmouk University (public) created a first-of-its-kind free online platform (<https://BeEnglishReady.net/>) to help native Arabic speakers be prepared to complete their postgraduate studies at prestigious U.S. universities.

## OPPORTUNITIES

The U.S. Embassy created and supported the Jordanian-U.S. University Cooperation Network (UCN) to establish and sustain institutional research partnerships between U.S. higher education institutions and Jordanian universities, and to support faculty and student mobility programs.

The U.S. Embassy in Amman has launched the GRE English Prep Program, an online tool created in partnership with Yarmouk University (a UCN member) to support native Arabic-speaking students considering graduate study in the U.S. Visit: (<https://beenglishready.net/>)

Although there is substantial interest in attending U.S. higher education institutions, knowledge is limited regarding the higher education system in the United States.

Recently the Higher Educational Council supported creating new specializations to meet with the demands of the regional and global labor market.

Dental has been a specialty in two leading universities, in 2022 two more universities has added the dental to its programs and another five universities are in the process of granting the approval to add Dental to its programs.

## BARRIERS

Accreditation: Online programs are not preferred, for accreditation purposes. However graduate students may apply for an online certificate only if the university is ranked within the top 500 in the world.

American universities must be listed on CHEA and BIS to be accredited in Jordan.

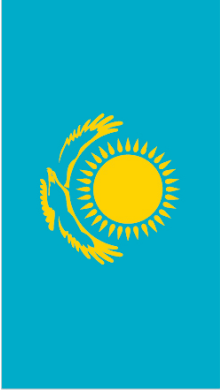
## RESOURCES

- U.S. Commercial Service – Jordan: <https://www.trade.gov/jordan>
- Ministry of Higher Education and Scientific Research: <http://www.mohe.gov.jo/>
- AMIDEAST Jordan: <http://www.amideast.org/jordan>

- Education Jordan, based in the U.S. Embassy, Amman: <https://educationusa.state.gov/centers/us-embassy-jordan>
- Jordanian-American Commission for Educational Exchange (JACEE) (aka The Binational Fulbright Commission in Jordan): <https://www.fulbright.org.jo/>

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# KAZAKHSTAN

<b>Capital:</b>	Nur-Sultan
<b>Population:</b>	19.54 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$496.1 billion (2021 est., in 2017 dollars)
<b>Currency:</b>	Tenge (KZT)
<b>Language:</b>	Kazakh

## UNESCO Student Mobility Number:

Kazakhstan has 90,333 students studying abroad according to UNESCO.

## CIA World Factbook:

39.1% of Kazakhstan's population is under 25 years of age.

## OVERVIEW

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 \$24,380 (2020) 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.

Kazakhstan's population reached 19 million in 2020. 90% 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. Over 84,000 students study abroad annually and 2,121 studied in the United States (2021/22).

Currently, 604,345 students are enrolled into higher education institutions in Kazakhstan. There are 124 universities nationwide. Tuition fees in Kazakhstan range 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 124 (mostly private) universities through mergers, downgrading, and closures. This reform tightens licensing regulations and qualification requirements for universities to ensure programs correspond to international standards.

Over 160,000 students graduated from high school in 2020, and the number is forecasted to rise to around 200-250,000 students that will graduate annually in the next five years. 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. College-aged population will expand considerably thru 2030 and this is expected to fuel continued growth in the number of outbound students.

State financing of education in 2019 was a record 19% of the national budget and 3.62% of the GDP, with the largest portion spent on secondary education, amounting to over USD 5.5 billion. The government announced that by 2025, education financing will increase to USD 27 billion (7% of GDP), with a focus on building 800 new schools, training in education technology and innovation, 100% coverage with kindergartens, and increasing teachers' salaries, among others. The State Program of Education includes construction of schools and kindergartens, modernization of vocational and technical education, e-learning education projects, and professional development systems for teachers.

The education system in Kazakhstan is highly centralized, which allowed it to effectively implement a response to the COVID-19 pandemic, with local governments moving quickly to online learning platforms. Most higher education institutions already had online infrastructure in place and secondary schools had 90% readiness. Technical and vocational colleges were less prepared for the transition. Despite 78% internet coverage across the country and access to cheap cellular data, some rural areas with no access relied on TV and radio to transmit material to students. Teacher training in cyber-pedagogy is a priority along with developing online digital learning content. Even before the pandemic, the government has been keenly focused on increasing digital capabilities in schools in Kazakhstan, but there is much room for improvement.

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 208 educational institutions with Bolashak agreements, 61 are in the U.S. An Academic Mobility Scholarship is another program introduced in 2011 that aims to support 300 students in state or national universities to complete part of their graduate degrees abroad at an institutional partner university.

## SUB-SECTORS

### Higher Education

Government reforms tighten licensing regulations and qualification requirements of local universities to improve education quality offer opportunities for U.S. higher educational institutions to attract students from Kazakhstan. Now, fewer than 5% of potential Kazakhstani students overseas are studying in the U.S., and out of 90,000 plus students studying overseas, 80% are self-funded. Higher educational attainment offers protection against unemployment in Kazakhstan.

### Community Colleges

Vocational education is underdeveloped since many vocational colleges and technical training schools were closed or transferred to other uses in the 1990s. Vocational schools offer professional training for students who are not able or do not wish to pursue higher education.

Community colleges offering associate degrees in the U.S. could be a good fit for this specific category of students.

### Undergraduate

949 students from Kazakhstan were enrolled in undergraduate programs in the United States in 2021/22.

### Graduate Education

726 students from Kazakhstan were enrolled in graduate programs in the United States in 2021/22 and 297 students were on Optional Practical Training (OPT).

### Secondary Education

Kazakhstan citizens have been able to obtain 10-year tourism/business visas since 2016, and since then demand for secondary education in the United States has seen an increase. This made the U.S. seem accessible and parents see secondary education as an easier pathway towards higher education in the United States.

### Online Programs

The Fall 2020 secondary education was conducted online at over 7,000 schools. The lack of curated digital learning material, despite good connectivity, was named as one of the biggest concerns, especially in light of the COVID-19 pandemic. Over 350,000 teachers currently receive training in IT and 'cyber-pedagogy'. There is an increased participation of students across different age ranges in online programs, particularly following Coursera's partnership agreements with the Government of Kazakhstan as part of a workforce development project. The Asian Development Bank is supporting a program to build the capacity of Kazakhstan civil servants across central ministries undergoing digital transformation.

### Research and Development

Starting in 2021, up to 500 scientists from Kazakhstan will receive a scholarship, within the framework of the Bolashak program, to undergo training in leading scientific centers of the world.

### Professional 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 an opportunity for more U.S. companies to penetrate the market with their services. Some of the popular individual training service topics are data science, digital marketing, and software programming, among others.

International consulting companies, Booz-Allen and Hamilton, Deloitte & Touche, EY, KPMG,

McKinsey, PwC are represented in Kazakhstan and some offer corporate trainings or conduct their activities on a project-by-project basis with fully established offices in Astana and Almaty. Franklin Covey opened their office in 2010 on a license.

### Education Technology

The government will continue to seek digital learning content from sources abroad to be adapted to local standards with over 7,000 schools operating online in 2020. Lack of learning devices was cited as a key issue, especially in rural areas; lack of technical skills and cyber-pedagogy is a potential opportunity for U.S. education training providers.

### OPPORTUNITIES

Tightening government restrictions on higher educational institutions in Kazakhstan presents an opportunity for U.S. higher educational institutions to attract students from Kazakhstan. Additionally, due to underdeveloped vocational programs in Kazakhstan, U.S. community colleges could successfully attract students seeking an associate's degree.

There are also opportunities in professional 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, 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.

### DIGITAL MARKETING STRATEGIES

All webinars, education fairs and promotion events have shifted into virtual spaces, but face-to-face communication is still essential to developing partnerships in Kazakhstan. Local agents are open to speaking with institutional representatives online. Skype and Zoom are the most-used platforms for communication, while Facebook, Instagram, TikTok and YouTube are the best choices for promotional purposes and are widely used for promotion of overseas education. LinkedIn and Headhunter are widely used for job opportunities.

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 several qualified educational agencies that operate on the territory of Kazakhstan. A proper due diligence is recommended before establishing partnership relations.

An important segment of the market to target are parents. 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 peoplenumber of national users is approaching 10 million people.

### EVENTS

- **Begin Private School Fair**, September 30, 2023 and February 24, 2024 in Astana; October 1, 2023 and February 25, 2024 in Almaty : <https://begingroup.com/en/fairs/begin-private-school-tour/>

## EVENTS

- Begin Private School Fair, Kazakhstan – Spring & Fall 2024: <https://begingroup.com/en/fairs/begin-private-school-tour/>
- University Fairs – Kazakhstan: <https://universityfairs.com/fair/kazakhstan-international-education-fair>

## RESOURCES

- U.S. Commercial Service – Kazakhstan: <https://www.trade.gov/kazakhstan>
- Kazakhstan's Ministry of Education and Science: <https://www.gov.kz/memleket/entities/edu?lang=en>
- Bolashak Scholarship Program: <http://www.bolashak.gov.kz>

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# KENYA

<b>Capital:</b>	Nairobi
<b>Population:</b>	57.05 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$251.43 billion (2021 est., in 2017 dollars)
<b>Currency:</b>	Kenyan Shillings (KES)
<b>Language:</b>	English (official), Kiswahili (official), numerous indigenous

### UNESCO Student Mobility Number:

Kenya has 14,060 students studying abroad according to UNESCO.

### CIA World Factbook:

59.16% of Kenya's population is under 25 years of age.

## OVERVIEW

The government of Kenya continues to place a high priority on education in its budgetary allocation, in line with its mandate of ensuring every Kenyan citizen is literate and able to access basic education. In the 2020-2021 national budget announcement, the education sector was allocated KSh 497.7 billion (\$4.4 billion) or 26.7% of the national budget. Of this, KSh 59.4 billion (\$524.8 million) was allocated for free secondary education and KSh 12.4 billion (\$109.6 million) for free primary school education. The Treasury further allocated KSh 2 billion (\$17.7 million) for the recruitment of five thousand teachers, KSh 1.8 billion (\$15.9 million) for the school feeding program, KSh 6.3 billion (\$55.7 million) to TVET (technical and vocational education and training institutions), KSh 4 billion (\$35.3 million) for exam registration fee waivers for class 8 and fourth form students, and KSh 800 million (\$7.1 million) for digital learning programs as well as for implementing the Competence-Based Curriculum (CBC). The Higher Education Loans Board that offers student loans was allocated KSh 16.8 billion (\$148.4 million).

All learning institutions were shut down in early March 2020 by the government to contain the Covid-19 pandemic. Prior to this, the Ministry of Education was following an expansion strategy for both primary and secondary schools and implementing a newly rolled-out curriculum. The education sector was grappling with increased demand and limited resources, giving a chance for private investors to venture into the sector. The number of private schools increased from 7,742 in 2014 to 16,594 in 2020, showing the increase in demand for education services. International private equity and individual investors responded to the opportunity in the Kenyan education sector with numerous acquisitions and investments in various educational institutions. Tuition fees for private education remain costly, hence government intervention with the help of international bodies and aid agencies like UNICEF, USAID, World Vision, and JICA, among others, who have contributed significantly to the expansion and development of education in the country, especially in public institutions.

Resumption of learning activities in the country commenced in October 2020 with selected classes from grade 4, class 8, form 4, and final year university students fully resuming learning in January 2021 in line with Covid-19 protocols and guidelines. The Treasury further allocated

KSh 11.2 billion (\$98.9 million) to schools to manage pending bills accrued during the pandemic.

### Top Areas of Study for Kenyan Students

Major Field of Specialization	2020-2021
Business and Management	13%
Education	4%
Engineering	22%
Fine and Applied Arts	3%
Health Professions	15%
Humanities	5%
Math/Computer Science	13%
Physical and Life Sciences	10%
Social Sciences	8%

### OPPORTUNITIES

Most opportunities are found in recruiting for undergraduate and graduate programs in the United States. Kenyan students have high interest in studying technology and computer sciences, and are especially interested in courses not offered by local universities.

	2018/19	2019/20	2020/21	2021/22
Undergraduate	2,008	2,106	1,913	1,954
Graduate	928	1,113	1,072	1,202
Non-degree	68	56	43	60
OPT	447	435	474	583

Source: IIE Open Doors Report

### DIGITAL MARKETING STRATEGIES

Students in universities and high school use various platforms to stay up to date with their learning. The pandemic period has seen skyrocketing use of online education platforms. Zoom and Google Meet are the primary platforms for administering classes among university students, while local platforms such as Kytabu and E-limu are used by high school and primary school students. The number one social media site used by students is Facebook, although at a declining rate. Instagram follows, with YouTube gaining traction throughout the country. Large telecommunications companies saw the potential that YouTube has and started offering YouTube bundles and educational bundles to students for use in their learning.

Students use Google to do basic research on many topics, as it is the most available platform in the country, largely because of the widespread ownership of Android devices among many students. Primarily, students use Google to look for various job opportunities, but local platforms like Fuzu and BrighterMonday also have strong usage for accessing employment opportunities. In-country schools mainly use Facebook to reach students and Instagram to appeal to new students. Twitter is also used to lure students, with schools Tweeting various achievements and/or events. Parents and students receive information about educational opportunities through platforms such as Facebook. Educational marketers know the value that the platform brings. WhatsApp also plays a role in sharing some of the information from other social media platforms.

U.S. education institutions should take advantage of the thriving digital space in Kenya by investing in content creation to attract Kenyan students. Virtual school tours, student life, and educational benefits are some of the aspects that they should focus on. Facebook should be the primary platform of use, along with Google to target the specific demographic and to target parents who fund their children's educational dreams. YouTube and Instagram should also be utilized to appeal to students looking to study in the U.S.

### EVENTS

- **International Schools & Education Fair Africa (ISEF)** - (Upcoming events 2023/2024): <https://www.isefafrica.com/>
- The best time for recruiting students is during annual education fairs, **KCSE (Local)** - January - March & May - July and **international** during September - November & January - April.

### RESOURCES

- U.S. Commercial Service - Kenya: <https://www.trade.gov/kenya>
- Ministry of Education - Scholarships: <https://www.education.go.ke/scholarships-0>

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# KUWAIT

<b>Capital:</b>	Kuwait City
<b>Population:</b>	3.1 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$191.5 billion (2020 est., in 2017 dollars)
<b>Currency:</b>	Kuwaiti dinars (KD)
<b>Language:</b>	Arabic (official), English widely spoken

## UNESCO Student Mobility Number:

Kuwait has 24,390 students studying abroad according to UNESCO.

## CIA World Factbook:

39.25% of the population in Kuwait is under 25 years of age.

## OVERVIEW

Kuwait spends heavily to improve its educational system, to rebuild old schools and create new facilities. The budget allocated for the fiscal year 2022/2023 is \$7.36 billion.

## Scholarships and Study Abroad

Kuwaiti students who have a high school diploma or equivalent are eligible to apply for the Ministry of Higher Education Scholarship Program to undergraduate studies. There is no limit on the number of scholarships. In July 2022, the Kuwaiti government provided 3,454 external scholarships, 1,234 for the United States.

The overall number of university scholarship recipients abroad decreased in Academic Year 22-23. However, the percentage of recipients of scholarships to the U.S. increased from 31% to 36%, while the UK, our main competitor, maintained its percentage at 42% compared to last year.

In 2018, the Ministry of Higher Education has adopted a new regulation stating that Kuwaiti students seeking to obtain a scholarship to study in the United States are required to obtain a score of 5 in IELTS ( an equivalent of TOEFL) to be accepted in the program which may impact the number of new students awarded Government of Kuwait scholarships. This is a contributing factor in why the number of scholarships has been decreasing over the past two years. The Ministry of Higher Education hopes to increase the number of scholarships available to its students to address the volume of high school graduates seeking higher education abroad.

As of 2019, and before the pandemic period, approximately 13,000 students were studying in the United States. Due to several reasons (including the uncertain global coronavirus situation, the Health Ministry's recent recommendation to postpone travel plans, the Education Ministry's unclear position on resuming public sector education) the percentage of U.S. scholarship recipients has decreased compared to prior years but is going up again comprising 36% of the total scholarships in 2022 (31.5% in 2021).

## Schools and Universities in Kuwait

In total, there are approximately 1,300 public and private elementary and secondary schools in Kuwait. The Ministry of Education (MOE) has begun to revamp its entire curriculum, starting at the primary school level. The project is to be phased in over a period of five years and will cover all subjects, from social sciences to mathematics and science. Industry experts expect the demand for training programs in a variety of fields will increase due to Kuwait's multi-billion dollar national development plan. Of the 30 international schools, eight are American and the rest follow Canadian, British, French, or Indian curricula, with English-language programs.

There are fifteen private universities in Kuwait. Kuwait University, the only public university, graduates 4,000 students each year. Students earn degrees from a variety of programs. On May 4, 2004, the government issued a decree establishing a new Kuwait University City in the Shedadiya area, with a campus including various colleges, scientific centers, and other facilities, allowing an increase in the university's student body. The University has opened the doors to students in September 2019. Another public university "Sabah Al Salem University City" will open in September 2023 in the Sabah Al Salem Area. The facility is under construction and will integrate facilities and six colleges within one campus. The private universities are: the American University of Kuwait, American University of the Middle East, The Arab Open University, Australian College of Kuwait, Kuwait International Law School, Kuwait Maastricht Business School, Algonquin College, Kuwait Technical College, Box Hill College, American International University, Gulf University of Science and Technology, Kuwait College of Science & Technology, College of Aviation Technology, American College of the Middle East and International University of Science and Technology in Kuwait.

## Training

There is also high demand for vocational and non-degree training.

Approximately 21.5% of the population of the country is within the age group of 15-29 years. Much of this group will enter the workforce in the next few years and thus will drive the demand for vocational and professional training in the country.

The country's demography is very young, and the coming generation will lead the diversification and development of Kuwait. Hence, the government is keen to enhance the skills of the population so that they can meet the challenges of the work environment. The government of Kuwait caters to the training needs of the Kuwaitis population through the Public Authority for Applied Education and Training (PAAET). As per the budget for the year 2022-2023, the government has allocated funds to the extent of USD \$1.15m towards the needs of the PAAET.

PAAET is also the governing authority that issues licenses to the private companies for training activities in the country. PAAET provides trainings in a number of fields: Telecommunication & Air Navigation, Electricity & Water Training, Industrial Training, Establishment Training, Nursing, Vocational Training, and Administrative Office Training.



## SUB-SECTORS

### Best Prospect Services

- ESL and TOEFL
- Certified Programs: executive training, management training, IT training, security training, and ongoing professional development
- Undergraduate degrees in pharmacy, engineering, and dentistry, and graduate business degrees
- Exam review courses for U.S. medical board exams

### DIGITAL MARKETING STRATEGIES

In Kuwait, the digital marketing strategies used by students are the following: For most educational webinars and online sessions, students use Microsoft Teams and Zoom, as well as WebEx in rare cases.

Social media use is nearly universal among Kuwaiti. Instagram, TikTok, Snapchat, YouTube (for streaming videos), and Facebook are the most popular social media sites for Kuwaiti students, although Facebook is less popular among the younger generation. The most popular information search site for students is Google. Therefore, it is important to make sure content on educational opportunities is up-to-date and your institution's search engine optimization (SEO) strategy is strong.

Some of the popular online platforms for students seeking job opportunities are Gulf Talent, Bayt.com, and LinkedIn. However, not all students have a LinkedIn account. Students and parents are generally kept informed via email marketing, online, through counselors and local schools and educational events. These events allow students the opportunity to meet the universities directly or through virtual channels.

### OPPORTUNITIES

The Government is encouraging studies in certain disciplines, including dentistry, nursing, and pharmacy, due to the high demand for workers in these sectors, as well as science, technology and engineering (STEM) programs. U.S. universities targeting Kuwaiti students should approach the Cultural Office of the Embassy of the State of Kuwait in Washington, D.C. and request inclusion on its list of pre-approved universities. Universities must meet the specific criteria of the Kuwaiti Embassy's Cultural Office in order to be included on this list. To confirm if your university is already on the list, visit the SIS Kuwait Culture D.C. website: [https://kuwaitculturedc.org/university\\_listing/ext\\_mcpf\\_list.php?a=showall](https://kuwaitculturedc.org/university_listing/ext_mcpf_list.php?a=showall)

The Ministry of Higher Education had added in 2019 some majors to their approved list: cybersecurity and meteorology.

### EVENTS

The U.S. Embassy in Kuwait places significant emphasis on the promotion of American education and training institutions. The Embassy regularly promotes various education fairs, including the USEG Expo, EduEx Expo, International Student Network (ISN) Expo, and Linden Tours.

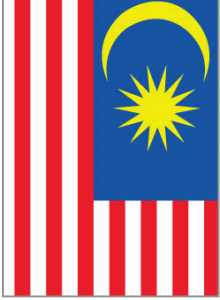
school counselors and principals. Universities that have utilized this service in the past have found it to be very effective in establishing business relationships with local international and bilingual schools.

### RESOURCES

- U.S. Commercial Service - Kuwait: <https://www.trade.gov/kuwait>
- EducationUSA: <https://educationusa.state.gov/centers/educationusa-us-embassy-kuwait>

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# MALAYSIA

**Capital:** Kuala Lumpur  
**Population:** 34.2 million (2023 est.)  
**GDP (Purchasing Power Parity):** \$884.1 billion (2021 est., in 2017 dollars)  
**Currency:** Ringgits (MYR)  
**Language:** Bahasa Malaysia (official), English, Chinese (Cantonese, Mandarin, Hokkien, Hakka, Hainan, Foochow), Tamil, Telugu, Malayalam, Panjabi, Thai

## UNESCO Student Mobility Number

Malaysia has 55,311 students studying abroad according to UNESCO.

## CIA World Factbook

43.43% of Malaysia's population is under 25 years of age.

## OVERVIEW

According to the Open Doors data for the 2021-2022 school year, Malaysia had 4,933 students studying in the United States. While the United States had been steadily attracting more students from Malaysia since 2010, the number of students peaked in the 2017-2018 academic year with 8,271 students. Today represents a 40% decrease over the high point in 2017-2018.

The number of scholarships to study in the U.S. offered by Malaysian companies and government agencies has recently declined, but major companies such as Khazanah Nasional, Petronas, and Bank Negara continue to fund U.S. educational opportunities. Many of these scholarships, however, are reserved for Bumiputra students (Malay Muslim ethnic group). Thus, students from Chinese, Indian, and other ethnic groups must find other routes for financing their studies abroad. The Public Service Department (PSD) in Malaysia offers full scholarships to its National Scholars for undergraduate studies at top-ranked universities around the world, including those in the United States.

The primary sources of funding for Malaysian students are personal and family. Malaysian students are generally known to be good and serious students. Malaysian government and private corporation scholarships are a secondary source of funding for Malaysian students. Successful Malaysian government scholarship applicants must be accepted into a TIMES Higher Education (T.H.E.) World University Ranking Top 100 school to have access to these funds.

T.H.E. is part of the Thomson Reuters Group. Due to continued U.S. government commercial diplomacy efforts, the Malaysian government is willing to explore alternatives outside the T.H.E. Top 100 ranked institutions.

The top five international education destinations for Malaysian students other than the U.S. are Australia, the United Kingdom, Japan, Indonesia, and New Zealand, with the majority going to Australia and the United Kingdom.

## SUB-SECTORS

International Education Overview	2018/19	2019/20	2020/21
Number of Malaysian Students in U.S.	7,709	6,910	5,280
Percentage Change from Previous Year (%)	-6.8	-10.4	-23.6

Source: IIE Open Doors Report

## Below are the top five fields of study for Malaysian students in the U.S.:

- Chemical Engineering
- Business and Management & Accountancy
- Electrical and Electronics Engineering
- Architectural/Built Environment
- Physical and Life Sciences/Chemistry

Although most Malaysian students are still seeking four-year university undergraduate degrees, the U.S. Commercial Service in Malaysia is seeing an increased interest in associates, graduate, and post-graduate degrees as well. Optional Practical Training (OPT) involving internships, either pre- or post-completion of degree, is gaining market traction as well.

## OPPORTUNITIES

Academic	2017/18	2018/19	2019/20	2020/21	2021/22
Undergraduate	5,817	5,104	4,333	2,996	2,670
Percentage Change from Previous Year (%)	4.2	-12.3	-15.1	-30.9	-10.9
Graduate	1,116	1,061	1,069	995	1,029
Percentage Change from Previous Year (%)	-12.1	-4.9	0.8	-6.9	3.4
Non-Degree	115	153	110	44	48
Percentage Change from Previous Year (%)	-48	33.0	-28.1	-60.0	9.1%
OPT	1,223	1,391	1,398	1,245	1,186
Percentage Change from Previous Year (%)	3.9	13.7	0.5	-10.9	-4.7

Source: IIE Open Doors Report

Malaysia aspires to be a regional and international education hub. The Malaysian government is strongly encouraging international education partnerships and collaboration and is also pushing 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 programs] and foreign education institution branch campuses, are various forms of collaboration opportunities.

## DIGITAL MARKETING STRATEGIES

Digital marketing in Malaysia is rapidly growing and becoming a competitive industry, especially with the current global pandemic and the increase of smartphone penetration in the country. While there were 29.55 million internet users in Malaysia in January 2022 with an internet penetration rate at 89.6 percent of the total population, the number of social media users in Malaysia at the start of 2022 (30.25 million) was equivalent to 91.7 percent of the total population. Additionally, with 42.11 million mobile connections at the beginning of 2022 that was up 1.6 million over the previous year.

Google is widely used to search for information. Facebook, Instagram, Twitter, YouTube, and WhatsApp are the most popular social media sites in Malaysia.

The Ministry of Education has also launched an e-learning platform “Classruum” that provides online lessons, including video tutorials, notes, trial examinations, and gamification. Subjects that students will need to know for their major exams are taught on the platform. All lessons comply with the Education Ministry’s syllabus and are taught by a selected group of Malaysian teachers and tutors. The pre-school education mobile application, “Classruum Playlabs” is designed for small children from four to six years old to educate them about colors, numbers, and the alphabet. Another new platform, “Brain Box”, which focuses on skills, such as cooking, gardening, sewing, carpentry, and foreign language, is also being considered.

Jobstreet and Indeed are the most widely used search engines to look for job opportunities. YouTube, Twitch, and Facebook are widely used for streaming.

## TECHNICAL AND VOCATIONAL EDUCATION AND TRAINING (TVET)

TVET is essential in bridging the talent gap in the industrial sector. With that, Malaysia has identified 12 hubs for TVET, including automotive, semiconductor, marine, aerospace, robotics, telecommunications, hospitality, and tourism.

Department of Statistics Malaysia reported that for the second quarter of 2022, the number of jobs in the semi-skilled category remained dominant in the labor market at 62.2 percent, followed by highly skilled jobs at 24.9 percent and unskilled jobs at 12.9 percent.

For Malaysia to stay competitive, it needs to increase the number of highly skilled workers to more than 4.5 percent by 2030. Initiatives that enhanced local students to major in TVET and science, technology, engineering, and mathematics (STEM) courses continue to be highly enriched as Malaysia seeks to produce skilled workers who capitalize on the opportunities created by IR4.0.

## EVENTS

- Private and International Student Fair upcoming schedule: <https://privateinternationalschoolfair.com/events/15th-private-international-school-fair-in-kuala-lumpur-0>

## RESOURCES

- U.S. Commercial Service Malaysia: <https://trade.gov/malaysia>
- Department of Statistics Malaysia: <https://www.dosm.gov.my/v1/>
- Ministry of Education Malaysia: <https://www.moe.gov.my/en/>
- EducationUSA: <https://www.macee.org.my/educationusa-malaysia/>

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# MEXICO

**Capital:** Mexico City  
**Population:** 129.8 million (2023 est.)  
**GDP (Purchasing Power Parity):** \$2.418 trillion (2021 est., in 2017 dollars)  
**Currency:** Mexican Peso (MXN)  
**Language:** Spanish and indigenous languages (various Mayan, Nahuatl, and other regional languages)

## UNESCO Student Mobility Number:

Mexico has 34,781 students studying abroad according to UNESCO.

## CIA World Factbook:

42.98% of the population in Mexico is under 25 years old.

## OVERVIEW

Mexico is the ninth leading country of origin for students studying in the United States. In the 2021-2022 academic year, 14,500 Mexican students were enrolled in U.S. schools, primarily in undergraduate programs. The five main destinations for Mexican students are Texas, California, New York, Massachusetts, and Florida. Due to the strong commercial and cultural ties between both countries, Mexican families choose the U.S. as the main destination for education abroad programs.

Mexican Students in U.S. Colleges and Universities 2021-2022 Academic Year		
Academic Level	Number of Students	Percentage
Undergraduate	7,738	6.0%
Graduate	4,412	16.5%
Other / Non-Degree	651	81.2%
Optional Practical Training	1,699	10.5%

Source: IIE Open Doors 2022

International student mobility is considered a priority for Mexican private education institutions, as it is a pillar of Mexico's competitiveness in the global market. Mexico and the U.S. have a strong collaboration in cultural and educational programs to support the development of students, faculty, and researchers.

One of the most successful regional programs is the 100,000 Strong in the Americas (100K) Innovation Fund, launched in 2014. This is the Western Hemisphere's signature education initiative, which stimulates and supports institutional partnerships and student exchange and training opportunities through collaboration among regional governments, the private sector, foundations, Non-Governmental Organizations (NGOs), and higher education institutions

to strengthen regional education collaboration. It also aims to increase student mobility and workforce development. In seven years, Mexico has become the leading country in this hemispheric-wide education initiative in forming partnerships with U.S. colleges and universities and in implementing new models of student learning, exchanges, and training programs in both countries. To date, 20 Mexican states and 27 U.S. states benefit from 100K Innovation Fund partnerships and programs.

Another key regional program, the Hemispheric University Consortium (HUC), was created in 2018 to facilitate collaboration in education and research to generate solutions to challenges in public health, climate change, and sustainability issues. The University of Miami coordinates this unique consortium, comprised of 14 universities, developing solutions-based research and educational programs. As part of the U.S.-Mexico Bilateral Forum on Higher Education (FOBESII) initiatives for institutional collaboration, the U.S.-Mexico Program for the Internationalization of the Curricula, executed by the Mexican Association for International Education (AMPEI), supports faculty course development to provide Mexican and U.S. students with international virtual exchange experiences. Launched in September 2020, AMPEI's website (<https://ampeii.org.mx/>).

Opportunities for community colleges and boarding schools are increasing, particularly among Mexican students looking for educational opportunities at a younger age or those interested in two-year programs. Mexico's higher education system offers opportunities for U.S. community colleges to develop collaborative programs with technical universities in different regions in Mexico. Due to the Covid-19 pandemic, virtual collaboration between Mexican and international high schools has increased to provide students with virtual international experiences.

## SUB-SECTORS

### Higher Education

During the 2021-2022 academic year, 14,500 Mexican students enrolled in U.S. higher education institutions, representing an 11.7% increase from the previous year. Among the top fields of academic interest of Mexican students in U.S. institutions are the STEM fields, such as engineering, business administration, and social sciences, as well as fine and applied arts.

Mexican higher education institutions actively participate in regional education consortia to increase their knowledge and collaboration with other institutions in the same region and to develop mobility strategies to increase the exchange of students, faculty, and collaborative programs.

### Undergraduate

According to the latest IIE Open Doors 2022 statistics, 7,738 Mexican students enrolled in U.S. institutions for undergraduate programs. Mexico and the United States have a strong relationship not only in trade, but bilateral academic collaboration has also strong linkages among U.S. and Mexican institutions. The key factor for Mexican students looking for undergraduate academic programs abroad is an innovative curriculum that can help them develop strong multicultural skills to be competitive in the international market.

The job market in Mexico is diverse because of the dynamics of the country, but the fields most in demand are IT, cyber security, financial services, engineering, aerospace, health, digital media, and education.

## Community College

Given the global competition in the manufacturing sector, training of skilled workers is becoming more significant in Mexico. Opportunities for community colleges are increasing, particularly among Mexican students interested in two-year programs. Mexico's higher education system offers different options for U.S. community colleges to develop collaborative programs and increase academic mobility with technical universities that offer bilingual education in different regions in Mexico. The most in-demand technical specializations are in the IT, engineering, aerospace, agribusiness, and tourism industries.

## 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 fields such as aerospace, environmental studies, business, education, and IT, among other specialties. Mexican students pursuing graduate education abroad seek for funding or scholarship support. Therefore, it is recommended to develop relationships with granting organizations such as the U.S. -Mexico Binational Fulbright Program (Fulbright-Garcia-Robles), which is one of the largest in the world, sending about 100 grantees in each direction and receiving approximately \$5 million annually in contributions from the governments of the United States and Mexico. Since the establishment of the binational Fulbright Commission in 1990 with joint U.S. and Mexican funding, more than 3,500 students on both sides of the border have received Fulbright-Garcia-Robles scholarships.

## Secondary Education

Given the strong ties with the United States, Mexican families seek academic opportunities in U.S. boarding schools mostly from grades 10 to 12, 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 develop relationships with local schools or educational partners to promote U.S. boarding school education opportunities.

## Online Programs

Online education gained importance in the last year, mainly for short-term programs or specialization programs (MOOCs). Mexican students prefer hybrid or blended programs, where education can be done online, but an option for personal advisory at least once per month, since students still need personal contact with the instructor.

Another trend in K-12 education is to partner with local schools to provide online complementary education and obtain a dual certificate. This option provides students the possibility to pursue undergraduate studies in U.S. higher education institutions.

U.S. institutions must be aware of the new taxation of the digital economy in Mexico that came into effect on June 1, 2020. Mexico incorporated a new chapter into its Value Added Tax (VAT) law, aimed at setting rules for the rendering of 'digital services' by foreign residents. Under the new taxation regime, digital services – including distance learning – that are performed through digital content or applications via the Internet or any other network, which are fundamentally automated, are subject to specific VAT rules (16% tax) whenever the receiver of the service is in Mexico.

## Research and Development

In 2014, the U.S. and Mexican governments implemented a bilateral education 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. Through FOBESII, the National Science Foundation (NSF) and Mexico's National Science and Technology Council (CONACYT) have fostered high quality and industry-relevant collaboration among universities, research centers, and industry of both countries. Besides FOBESII's bilateral research collaboration, universities have continued their research project partnerships with industry players.

## Professional Training Services

Workforce and professional training are an important element to improving competitiveness in-country. With an eye towards 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 and effectiveness, innovate and strengthen their relationships with clients, and improve English language skills. Customized training in information technologies, quality control, management, and language programs are in high demand.

With the implementation of the U.S. – Mexico – Canada (USMCA) Trade Agreement, opportunities for community colleges to partner with local institutions and develop programs to upgrade workers' skills and technical knowledge are arising. Collaboration between technical schools and the private sector will increase regional competitiveness.

## Education Technology

As part of the Mexican education model, technology plays a key role in providing learning tools to students and fostering interactive experiences. The Mexican government, through the Secretariat of Education and private educational institutions, has been investing in equipment and technology solutions such as software, applications, and digital content to provide students a more participative experience. The Covid-19 pandemic challenged the education sector, mainly at the K-12 level, as students had to shift from in-person classes to a virtual education model. Now K-12 schools are investing in more IT equipment as well as faculty training to deliver hybrid education.

Higher education institutions in Mexico have moved to educational models that incorporate innovative digital and interactive classrooms, laboratories (robotics, language), and digital libraries as part of their strategies to improve teaching and student experience. The implementation of virtual reality in the classroom has become a priority for the next few years.

## OPPORTUNITIES

The key opportunities in Mexico are in three areas:

- Study in the U.S. at the undergraduate and graduate levels, and for non-degree programs and OPT. This includes language training and practical training.
- Providing professional training services in Mexico represents a significant opportunity for U.S. education providers. This can include partnerships with local education institutions or management companies. Online training options are becoming more popular for language learning.
- The education supplies and technologies sector offers strong opportunities for U.S. solutions providers, particularly in the areas of software, online learning, development of apps, classroom or field education tools, and distance learning services.

## DIGITAL MARKETING STRATEGIES

According to the latest statistics from the National Institute of Statistics and Geography (INEGI), there were about 96.87 million Internet users in Mexico by January 2022, representing 74% of the Mexican population – up 3.8% over the previous year. The main group that uses the Internet for most of their daily activities are 18-24-year-olds, followed by those ages 12-17. Mexicans use the Internet for entertainment, search of information, and communication (social media). Source: INEGI

Social media has become a powerful marketing tool to promote academic mobility. In Mexico, digital platforms are fully integrated into the lives of students, not only for academic purposes, but social media is also the main place where students spend their time connecting with friends, searching information, and for entertainment. About 100 million users in Mexico use social media. That represents about 77% of the active Mexican population, from which, 98% access from mobile devices. Mexican youth, mainly from 14-24 years of age are avid users of platforms such as YouTube, Instagram, TikTok, and Twitter. Facebook and LinkedIn are more popular with the 25-50-year-old population.

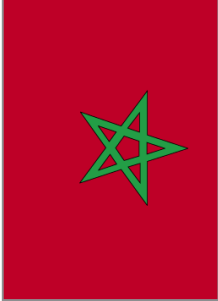
Facebook is the most used platform in Mexico with over 93 million users, representing 92% of the active population over 13 years of age; Instagram is the second most used with about 38 million users over 13 years of age.

## RESOURCES

- U.S. Commercial Service – Mexico: <https://www.trade.gov/mexico>
- Mexican Secretariat of Public Education (SEP): <https://www.gob.mx/sep>
- National Association of Universities and Higher Learning Institutions: <http://www.anuies.mx/anuies/instituciones-de-educacion-superior/>
- U.S. Embassy Education and English Programs: <https://mx.usembassy.gov/education/>
- COMEXUS – Fulbright-Garcia Robles scholarships: <https://www.comexus.org.mx/>
- Consortium for North American Higher Education Collaboration: <https://www.conahec.org/>
- 1000,000 Strong in the Americas Innovation Fund: <https://www.100kstrongamericas.org/>
- Peace Corps in Mexico: <https://www.peacecorps.gov/mexico/>
- Mexican Association for International Education: <https://ampej.org.mx/>

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# MOROCCO

**Capital:** Rabat  
**Population:** 37 million (2023 est.)  
**GDP (Purchasing Power Parity):** \$303.3 billion (2021 est., in 2017 dollars)  
**Currency:** Moroccan Dirham  
**Language:** Arabic (official), Berber languages (Tamazight (official), Tachelhit, Tarifit), French (often the language of business, government, and diplomacy)

## UNESCO Student Mobility Number:

Morocco has 63,001 students studying abroad according to UNESCO.

## CIA World Factbook:

43.59% of the population in Morocco is under 25 years old.

## OVERVIEW

Education is among the top priority sectors for the Moroccan Government. The government committed itself to pursuing education reforms to improve the sector's performance in its 2015–2030 education vision plan and its new Education Act, passed in 2019. For the 2021 budget, the government of Morocco has allocated USD 7.16 billion to the education sector.

The Ministry of Higher Education announced plans to open 34 new higher education institutions. There are currently 12 public universities in Morocco in eight different regions. The universities include 145 higher education establishments, including 61 open-access and 84 limited-access institutions.

Morocco introduced the Bachelor system to Higher Education for the 2021-2022 academic year. The foundational year for the Bachelor system offers the system as an optional and voluntary choice for students. 10% of the overall number of new undergraduate students opted for the Bachelor system instead of the 'Licence-Master-Doctorat' system.

The International Baccalaureate system was recently introduced in select public schools where cohorts are taught fully in English. These students represent a good target population for U.S. study.

## Morocco's Education Structure

Within the Moroccan education system, students attend pre-high school education for a period of 9 years, followed by 3 years of high school education. The academic calendar runs from September to June and it is recommended that visits from U.S. institutions occur in October/November or March/April.

## Secondary Education (High School)

High school education is taught in both Arabic and English, with students being required to take

three years of English. Students are graded out of a 20-point scale, with 10/20 counting as a minimum passing grade.

Throughout high school Philosophy, English, French, Arabic, Math, Science, Economics, Chemistry, Physics, and Biology are required courses that must be completed depending on a student's expected field of study. Additionally, to graduate, students must complete the Baccalaureate exam. Standardized undergraduate admissions testing is available in-country and advisors recommend that students take the following tests: TOEFL iBT, IELTS, SAT, ACT. As of 2019, Moroccan students averaged 18 in Reading, 21 in Listening, and 21 in Writing on the TOEFL (average of 80 total).

## University System Structure

Within the current Moroccan university system, undergraduate degrees take 3 years, however this will move to a 4-year structure in 2022. University classes are taught in Arabic and French, with English being added in 2022 following educational reforms. Students are additionally required to take 3 years of instruction in English.

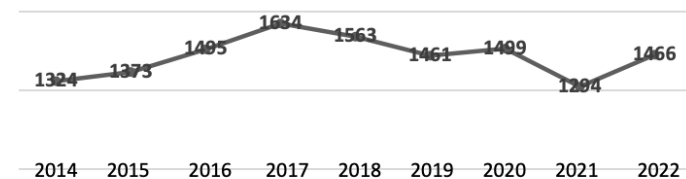
The grading system for Moroccan universities is the same as high school, with students being graded out of a 20-point scale. The top undergraduate fields of study include: Engineering, Business, Sciences, and Finance.

Students seeking further education in the form of a graduate degree take both the GMAT and GRE. As of 2019, average GRE scores for prospective graduate students were: 147.5 in Verbal; 152.2 in Quantitative Reasoning; and 3.2 in Writing.

## SUB-SECTORS

Most Moroccan students interested in studying abroad are at the undergraduate level (43%), and are seeking a bachelor's degree, or they start at community college and then transfer to a four-year institution. There is a growing interest in graduate studies abroad for Master and MBAs. There is also increasing interest in technologies and engineering programs (STEM).

Moroccan Students Studying in the U.S.



Source: 2022 Open Doors Report (published by IIE, funded by the U.S. Department of State)

In the 2021-2022 academic year, there were 1,466 international students from Morocco at U.S. higher education institutions, a 13.3% change from the previous year.

## Secondary Education

Demand for secondary education continues to grow as the Moroccan government approved in 2019 a new framework law which aims to increase the quality and accessibility of the education system.

### OPPORTUNITIES

With the different strategies that the government of Morocco developed in priority sectors such as Energy, IT & digital transformation, Industry 4.0 and health, there will be an urgent need for engineering profiles: R&D engineers, Energy engineers, Computing engineers, Civil engineers, Biotech engineers.

Morocco's growing economy provides families with the opportunity for increased income, which boosts their capacity to fund their children's overseas studies. The increasing demand from middle- and high-income Moroccan families who can afford to send their children overseas means that recruiting prospects from Morocco seem poised to remain strong.

Morocco is striving to become the hub for higher education in North Africa. The Moroccan Ministry of Higher Education (MOHE) has a national strategy in place to prioritize efforts that will improve the quality of education, bolster scientific research, foster competitiveness in the global economy and improve governance over the national educational system. U.S. education institutions could play an important role in the region through exchange programs and exchange of know-how.

### Best Prospects

It is recommended for U.S. universities and colleges to build more partnership with Moroccan universities, educational institutions, students' recruitment agencies and alumni associations. Joint events with the U.S. Mission in Morocco and local educational institutions could also be beneficial for U.S. universities and colleges.

- Develop specific English language programs for the target sectors.
- R&D partnerships

### DIGITAL MARKETING STRATEGIES

For education purposes, most Moroccan students use Zoom and Google platforms. The most popular social media sites for students are Facebook, YouTube, Instagram, and WhatsApp. Google is the most used by student for first searches of international universities.

YouTube, Facebook, and Instagram are the most popular sites for streaming videos in the country. In-country schools and other competitor countries, particularly Europeans, use blogs, Facebook and amazing videos on YouTube to attract Moroccan students.

The majority of internet and social media users in Morocco are young people aged 18-25 years old. It is important that U.S. universities target Moroccan students through digital content and platforms.

Online recruitment has become the first and most important channel for attracting and most important channel for attracting and enrolling international students. It is recommended for U.S. universities and educational institutions to start advertising on social media with targeted messaging to build awareness of their organizations/programs.

### EVENTS

- EducationUSA Virtual Fair and study in the U.S. advising events throughout the year (TBD)
- Forum de l'Etudiant (Student Forum), June 2023: <https://www.etudiant.ma/forums-salons>

### RESOURCES

- U.S. Commercial Service – Morocco: <https://www.trade.gov/morocco>
- Ministry of Education Website: <http://www.men.gov.ma/En>
- AMIDEAST Morocco Website: <http://www.amideast.org/morocco>
- EducationUSA Advising Centers in Morocco/ Casablanca Website: - <https://educationusa.state.gov/centers/educationusa-casablanca>
  - Email: [casablanca@educationusa.org](mailto:casablanca@educationusa.org)
- Rabat Website - <https://educationusa.state.gov/centers/amideast-rabat>
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# MYANMAR / BURMA

<b>Capital:</b>	Rangoon
<b>Population:</b>	57.9 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$216.94 billion (2021 est.)
<b>Currency:</b>	Kyat
<b>Language:</b>	Burmese (official)

## UNESCO Student Mobility Number:

Myanmar has 13,158 students studying abroad according to UNESCO

## CIA World Factbook:

42.97% of the population in Myanmar is under 25 years old.

## OVERVIEW

Myanmar currently has 47,365 primary schools with approximately 12 million students and 163 higher education universities with approximately 8 million students. Within the days of the coup (Military Coup 2021), a civil disobedience movement emerged, involving more than 300,000 teachers and staff. The State Administration Council (SAC) suspended over 11,000 academic staff and approximately 125,000 teachers and professors for participating in civil disobedience activities. In June 2022, the regime Ministry of Education declared the reopening of all elementary schools and institutions, although enrollment has been limited. 5.6 million of Burma's over 12 million students have returned to school for the new academic year. Compared to before the coup, enrollment in schools dropped by approximately 40 percent. Numerous students and families continue to oppose military-led schooling. Students are missing critical school years and are concerned about their education. Some students from upper and middle-class families are attempting to study abroad, while the rest are eager to obtain a degree from a recognized foreign university in private institutions in Myanmar.

Many local professional training centers/institutions have entered the market. There are approximately 35 local private training centers offering a variety of certificate and diploma courses in business management, finance, marketing, project management, information technology, engineering, accounting, and tourism, as well as 15 private training centers that offer bachelor's and master's degree programs from their partner international universities. More than 50 international schools and over 100 local private schools operate in Yangon and Mandalay, offering pre-elementary, elementary, secondary, and higher-education level courses to meet market demand for English language, computing, accounting, and business-related training.

Thailand and Singapore are the primary international host countries for Burmese students. Japan, Korea, and Malaysia are additional Asian destinations. The UK, U.S., and Australia are the leading educational destinations in the West. Burmese students' main study areas include business management, financial management, project management, hospitality, accounting, marketing, engineering, and information technology.

Some local education agents now provide preparatory educational services to students who want to study abroad or pursue international education. These education agents offer pre-collegiate programs to assist students in developing their academic abilities to secure admission and possible financial assistance at international institutions in the U.S., the U.K., Japan, Australia, Canada, and Singapore. They also assist with visa applications, prepare students for life in a Western college setting, and assist in career planning.

## SUB-SECTORS

### Community Colleges

The community college concept is gaining popularity in Burma as students and parents realize that the idea is an effective and economical route to transfer to high-ranked four-year universities. Burma ranks 25th among international students enrolled in community colleges in the United States in 2021, accounting for 0.7% of all international students (approximately 554 students). Local education agents play an essential role in promoting the community college concept in Burma. Many U.S. community colleges have partnered with regional study-abroad agents to recruit Burmese students. About 10-15 reputable education agents in Burma work with universities and colleges from various countries such as Singapore, Malaysia, Australia, Korea, Japan, the U.K., the United States, and Canada.

### Four-Year Degree and Master Programs

Local education agents and counseling services have partnered with many American universities to promote U.S. graduate and postgraduate programs to Burmese students.

## OPPORTUNITIES

People in Burma realize the importance of quality education, and parents are willing to invest in their children's education to have good career opportunities after graduation. The local learning centers actively seek partnerships with U.S. education institutes and universities for undergraduate, graduate, and postgraduate programs. According to some learning centers, Burmese students prefer to have more options and desperately wait for U.S. transactional programs.

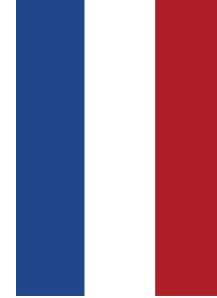
Educational seminars given by universities from different countries offering scholarships are becoming common in Burma. While attracting students from Burma, foreign universities can also explore new partnerships to invest in Burma's education sector. Private companies are investing in the primary and secondary school segments to meet the growing demand in the market.

## RESOURCES

- U.S. Commercial Service - Burma (Myanmar): <https://www.trade.gov/burma-contact-us>
- Bureau of Consular Affairs Report & Statistics: <https://mm.usembassy.gov/business/economic-data-reports-burma/>
- EducationUSA Burma (Burma): <https://educationusa.state.gov/centers/>

# THE NETHERLANDS

<b>Capital:</b>	Amsterdam
<b>Population:</b>	17.4 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$992.6 billion (2021 est., in 2017 dollars)
<b>Currency:</b>	Euro
<b>Language:</b>	Dutch



## UNESCO Student Mobility Number:

The Netherlands has 19,285 students studying abroad according to UNESCO.

## CIA World Factbook:

28.02% of the population in the Netherlands is under 25 years old.

## OVERVIEW

With a population of less than 18 million, the Netherlands is nevertheless an interesting market for U.S. institutions with an international program. The country is extremely international in its culture and is outward-looking in almost all respects. Dutch people are overwhelmingly pro-American and very much attracted to the U.S. as a vacation destination and as a destination for broadening their education horizons. The U.S. is by far the largest recipient of Dutch students outside of the EU, where Erasmus and other programs make it exceedingly easy on all levels for Dutch students to study.

According to the EF English Proficiency Index 2021, the Netherlands ranks number 1 out of 111 countries and Dutch students consequently are likely to see the U.S. as a prime study destination.

The World Economic Forum has ranked the Netherlands as the third most educated country in the world. A third of Dutch 25–64-year-olds hold a university degree, which is significantly higher than the OECD average of 24 percent. The primary international destinations for Dutch students are Belgium, the UK, the U.S., and Germany.

## SUB-SECTORS

### Higher Education

According to the 2022 Open Doors Report on International Education Exchange, there were 2,172 students from the Netherlands studying in the higher education sector in the U.S. during the 2021-2022 academic year, an increase of 23% compared with the previous year when the number was 1,767, but still lower than the pre-pandemic level of 2,727 students in 2019-2020.

The most popular areas of study for Dutch students in higher education are business and management, engineering, social sciences, physical and life sciences, and mathematics and computer sciences. Most Dutch students applying to U.S. higher education institutions are attracted by the flexible and broad curricula available in the U.S., along with opportunities to

[educationusa-burma-american-center-rangoon](https://educationusa-burma-american-center-rangoon)

- U.S. Embassy in Burma – Study in the USA: <https://mm.usembassy.gov/education-culture/study-usa/>
- U.S. Embassy in Burma – Consular Department: <https://mm.usembassy.gov/u-s-citizen-services/>

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combine an academic major with sports, music, or the arts, often supported by a scholarship. We estimate that Dutch students are spread equally between undergraduate, community college, and graduate education.

## Secondary Education

While the number of students enrolled in secondary schools has been slowly, but steadily dropping since 2016. Still, demand for secondary education is high – the enrollment rate is 92 percent, and 2021 enrollment was down 2,882 from the previous year. A total of 934, 164 students are currently in secondary education.

## Online Programs/Education Technology

Online education in the Netherlands has become more and more common due to digitization. The measures against the coronavirus have greatly accelerated the process.

SURF is a cooperative association of Dutch education and research institutions in which the members combine their strengths to innovate education with IT and benefit from the knowledge, experiences, and services that SURF is building together with education institutions. Please see the following website for English-language background information on education and IT in the Netherlands - <https://www.surf.nl/en/education-it>.

## Research and Development

The Netherlands spends an average of 2 percent of GDP on research and development, annually. This percentage is growing slowly and was 2.3 percent in 2020, the latest available statistic. Businesses are responsible for 48 percent of the expenditure, followed by higher education with 40 percent, and government covering 12 percent. The three largest sectors benefitting from R&D are engineering and technology (40%), natural sciences (20%), and medical science (17%).

## OPPORTUNITIES

Many Dutch education institutions, and all the high-profile ones, have longstanding and quite deep-rooted partnership programs with multiple U.S. institutions. Most are at the bachelor's degree level, and most have an exchange component. Best prospects in terms of fields of study are very similar to those listed by other EU markets, including Engineering, Business Management, and Computer Sciences. Culture and language play no role in deterring Dutch students from considering the U.S.

Most Dutch students applying to U.S. higher education institutions find the flexible and broad curriculum appealing, while also being drawn to U.S. campuses for the possibility of combining an academic major with sports, music, or the arts, often supported by a scholarship.

Tuition fees in the Netherlands are significantly lower, creating a potential obstacle for credit mobility between the U.S. and the Netherlands. Consequently, Dutch students are highly dependent on finding scholarships or other forms of financial assistance to be able to attend U.S. schools. Annually, two percent of Dutch degree-seeking students study abroad for a full-degree program.

The Dutch government's policy to increase the international component of the education system stimulates the process of encouraging Dutch students to study abroad, and a government funding program helps to cover some of the costs. Tertiary education in the Netherlands costs very little, in stark contrast to the U.S., and this issue is the largest obstacle to growing the number of Dutch students studying in the U.S. Consequently, shorter programs are the most popular. Strategies that should be followed to attract Dutch students to the U.S. are like strategies in other EU markets, but the role of Dutch education agents is limited, due to the number of Dutch education institutions with their own programs.

In the Netherlands, the Fulbright Center in Amsterdam is an important player in promoting educational cooperation by administering educational exchange programs between the Netherlands and the U.S. In addition, the Center provides information on study, research, and internships in the United States.

## DIGITAL MARKETING STRATEGIES

The most popular social media sites for students are WhatsApp, YouTube, Facebook, Instagram, and LinkedIn. Dutch students are part of at least seven WhatsApp groups, on average. Google and other search engines are frequently used by students to get information on any given topic.

Popular platforms to search for job opportunities are LinkedIn and Indeed.

Netflix, Videoland, HBO, Amazon Prime, Disney+, and Hulu are the most popular platforms to stream videos in the Netherlands.

Information events at universities or schools, websites, emails, and social media platforms are used by in-country schools and competitor countries to reach Dutch students. The Internet and email are the primary sources of information for parents and students regarding educational opportunities. The use of social media platforms like LinkedIn in digital outreach strategies is recommended for U.S. study state consortia and education institutions.

## EVENTS

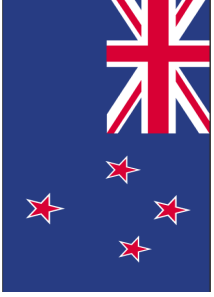
For upcoming events, including International Education Fair – Netherlands, November, 24-25 2023, please see <https://www.educationfair.nl/events/education-fairs-netherlands/>

## RESOURCES

- U.S. Commercial Service- Netherlands: <https://www.trade.gov/netherlands>
- Fulbright Center: <https://fulbright.nl/en/>

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# NEW ZEALAND

<b>Capital:</b>	Wellington
<b>Population:</b>	5.1 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$219.8 billion (2021 est., in 2017 dollars)
<b>Currency:</b>	New Zealand Dollar (NZD)
<b>Language:</b>	English (de facto official), Māori (de jure official)

## UNESCO Student Mobility Number

New Zealand has 5,038 students studying abroad according to UNESCO.

## CIA World Factbook

32.55% of New Zealand's population is under 25 years of age.

## OVERVIEW

Since 2019 the United States has become a more popular study destination for New Zealand students than Australia. During the 2021/22 academic year, 1,539 New Zealand students chose to study in the United States – an increase of 1.3% from the previous year. The small increase can be attributed to the global pandemic and the length of time that the New Zealand border was essentially closed. Numbers in the 2022/23 year are expected to increase further. Students pursue undergraduate degrees and optional practical training studies related to their academic field after their degree studies.

California, New York, Massachusetts, Pennsylvania, and Hawaii are the most popular destinations for New Zealand students. However, New Zealand students are currently studying in 49 of the 50 U.S. States (Open Door 2021), at almost 400 U.S. higher education institutions.

In the 2021/22 academic year, 58% of New Zealand students in the U.S. were at the undergraduate level, 26% at the graduate level, 15.5% were on Optional Practical Training (OPT), and the remaining 0.5% were on non-degree programs.

## OPPORTUNITIES

### College Athletics

The opportunity for student-athletes to earn an athletic scholarship is a significant 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 477 New Zealand student-athletes studying at NCAA Division I and II institutions. Students participate in the full range of NCAA offerings, but the top sending sports are soccer, basketball, tennis, track & field, golf, and swimming.

Student-athletes who have been asked to start in January after finishing New Zealand high school in December may now be eligible for early release of their results from the New Zealand Qualifications Authority to speed up the admissions process.

## 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 travel abroad for their entire degree.

## Graduate Studies

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

## Summer Work and Travel Program

New Zealand is currently participating in the Summer Work & Travel Program that allows exchange visitors from the respective countries to have the opportunity to gain international cultural exposure and a work and travel experience in the United States while U.S. participants can work and travel in New Zealand. The program provides a work and travel experience to qualified applicants who may not otherwise have such cultural exchange opportunities. New Zealand students on this Program can spend up to 4 months in the U.S.

## 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 to be able to tour your campus in person, making sure that your school's website and digital media offer genuine insight into your institution is very important.

- 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 institution's 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, interviews, and participate in recruitment activities is 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 is helpful when recruiting students from New Zealand. School Counselors mainly use Facebook and e-mail for their communications.

## Local Scholarships Programs

Fulbright New Zealand offers a number of awards for graduates, writer's, visual artists wanting

to study in the U.S., and those wanting to focus on indigenous development and innovation.

### Best Prospects

High School, Undergraduate and OPT & Online Degrees

### Best Student Recruitment Methods

Institutional, student outreach, online outreach, current student success stories and alumni spotlights. Counselor engagement is also encouraged.

### EVENTS

EducationUSA New Zealand Events: <https://www.facebook.com/educationusanz/events/>  
New Zealand International Education (NZIEC) Conference 2023  
Christchurch, New Zealand - August 16-18, 2023  
<https://www.nziec.co.nz/>  
Normally an annual event that takes place around August.

Flexible Learning Association of New Zealand (FLANZ) Conference 2023  
Auckland, New Zealand - September 27-29, 2023  
<https://flanz.org.nz/conferences/2023-conference/>

### RESOURCES

- U.S. Commercial Service New Zealand: <https://www.trade.gov/new-zealand>
- EducationUSA centers in New Zealand: <https://nz.usembassy.gov/education/educational-advising/>
- New Zealand Qualifications Authority: <https://www.nzqa.govt.nz>
- Fullbright New Zealand: <https://www.fullbright.org.nz/>

### U.S. COMMERCIAL SERVICE CONTACT

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# NIGERIA

**Capital:** Abuja  
**Population:** 230.8 million (2023 est.)  
**GDP (Purchasing Power Parity):** \$1.05 trillion (2021 est., in 2017 dollars)  
**Currency:** Nigerian Naira (NGN)  
**Language:** English

### UNESCO Student Mobility Number:

Nigeria has 71,753 students studying abroad according to UNESCO.

### CIA World Factbook:

61.97% of the population in Nigeria is under 25 years old.

### OVERVIEW

Nigeria has an estimated population of 219,463,862 people with an estimated growth rate of 2.53%. Nigeria's population is expected to explode to around 392 million in the year 2050, projecting it to be the world's 4th most populous country, thus creating a larger pool of education prospects for US HEIs.

Nigeria is Sub-Saharan Africa's largest economy and relies heavily on oil as its main source of foreign exchange earnings and government revenue. Following the 2008-09 global financial crises, the banking sector was effectively recapitalized, and regulation enhanced. Since then, Nigeria's economic growth has been driven by agriculture, telecommunications, and services. Economic diversification and strong growth have however not translated into a significant decline in poverty levels, as over 62% of Nigeria's population still live in extreme poverty.

The country is currently grappling with an economic downturn, which has seen more protectionist policies developed by the government, and stricter financial policies implemented to shore up the foreign exchange reserves. According to data from the World Bank, Nigeria had a negative GDP growth rate of -1.79% and a GDP Per Capita of \$2,085.00 in 2021, with inflation at 17%.

Nigeria has one of the larger telecom markets in Africa, with most Internet connections being available via mobile networks. There are currently over 184 million mobile users in Nigeria, with 88.18 out of every 100 inhabitants having access to the internet, which creates a market for distance/virtual learning.

Nigeria has seen a booming middle and elite class who value quality education, have international exposure, specific educational preferences, a higher disposable income, and general affluence - some of which drives the thirst for international education.

Nigeria currently ranks 10th on the International Student Leading Place of Origin. Of the 71,753 Nigerian students studying abroad, 14,438 are studying in the U.S., which represents a 12% increase in enrollment numbers from the previous academic year (12,860).

Academic Level	Number of Students	% Change
Undergraduate	4,529	-6.2%
Graduate	7,212	34.8%
Non-Degree	284	26.8%
Opt	2,413	-1.9%

*IIE Open Doors Report 2022*

Nigerian students have a strong focus on Science, Technology, Engineering, Mathematics (STEM), which leads to many students in both the undergraduate and postgraduate categories enrolling in courses such as Engineering, Mathematics, Health professions, etc. Arts (Fine/Applied), Social Sciences and other related courses remain a developing sector in Nigeria, with less than 20% enrollment ratios. Nigeria also has a high sports focus for physical, emotional, social, and psychological development, with several U.S. HEI's having participated in sports recruitment programs to identify and recruit top talent.

The United States Consulate in Nigeria awarded scholarships worth \$4.35 million to 30 Nigerian students in the 2021/2022 academic session. Students using EducationUSA Nigeria services recorded \$28 million in scholarship and financial aid awarded for the 2021 academic year.

Nigeria is an English-speaking country, having been colonized by the United Kingdom, and as such it has one of the lowest intake rates for Intensive English/English Preparatory courses in the U.S. English proficiency tests, SATs, GMATs, etc. are taught and administered locally and sometimes form a pre-requisite to obtaining admission from international schools, though most times admissions are reviewed on a case-by-case basis to determine if certain requirements can be waived.

Certification from the West African Examination Council (WAEC), a test management body approved by West African members states, is accepted globally as a test of student proficiency. English and Mathematics are compulsory subjects to be written by each student regardless of their academic inclinations, (e.g., Science, Arts). Educational transcripts from Nigeria can also be verified through the World Education Services (WES), and other such bodies, should the need arise for education and employment purposes in the U.S.

Generally, Nigerian schools operate a K – 12th grade model with boarding options, most of which are co-ed. Though there are several faith-based schools in Nigeria, many parents prefer to send their children to co-ed schools for social and network development.

The three best prospect cities for education recruitment in Nigeria are Lagos, Abuja, and Port Harcourt, with many affluent families and top-ranking high schools situated in those states.

Nigeria has 49 Federal Universities, 54 State Universities and 99 Private Universities, according to the National Universities Commission | ([nuc.edu.ng](http://nuc.edu.ng)), Nigeria's Higher Education (university) regulator. The country also has 12 approved distance learning centers.

## SUB-SECTORS

### Top Areas of Study for Nigerian Students

Major Field of Specialization	2021/2022
Business & Management	11.4%
Education	2.3%
Engineering	19.5%
Fine and Applied Arts	2.2%
Health Professions	12.4%
Humanities	2.7%
Intensive English	0.1%
Math/Computer Science	14.6%
Physical and Life Sciences	15.9%
Social Sciences	7.6%
Other Fields of Study	10.3%
Undeclared	0.9%

*IIE Open Doors Report 2022*

## OPPORTUNITIES

### Large Prospect Pool (Undergraduate, Graduate, Non-degree, Community Colleges)

There are over 300 combined public and private institutions of higher education: universities (49 federal universities, 54 state universities, and 99 private universities), polytechnics, specialized technology colleges, colleges of education, public and private high schools, and 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 academics, which make this a sub-sector best prospect. The provision of electronic content for online and distance learning is also growing rapidly. Given challenges with visa approvals for some international students, increasing access to the internet, and the rising cost of foreign exchange, online/distance learning is fast becoming an option that can be explored.

### 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 that continues to gain market position.

### Best Prospects:

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

### DIGITAL MARKETING STRATEGIES

Given increased access to internet connectivity (high/moderate upload and download speeds), prospective study abroad students from Nigeria access information about courses of study, institutions, tuition fees, etc. via generic searches on search engines over the internet. The most common search engine used in Nigeria is Google, where everything from learning to cook, to driving a car, to finding a job, searching businesses, etc. can be found. YouTube is also popular for video streaming, where educational and non-educational videos are uploaded for likes and comments from users.

Nigerian students have also become very social media savvy, with most having several accounts on popular platforms such as Facebook, Twitter, Instagram, Tik Tok, Snapchat, etc., where they engage with international admission officers from U.S. HEIs and other institutions.

Outside of the conventional means of accessing education related information, prospective students and parents engage in the services of education agents/travel agencies who have relationships with international education service providers or organize summer camp trips to destinations, such as the United States.

Doing business in Nigeria is also largely relationship based with industry associations, multilateral agencies, business management organizations, etc., as they use their networks to disseminate information through mass mail campaigns, mass SMS campaigns, newspaper inserts, billboard/advert placements, radio adverts, television adverts, social media influencers, etc.

In engaging with prospective partners within Nigeria, the following steps are suggested:

- Be upfront on agent commissions
- Adopt a hybrid model of providing learning (given visa constraints)
- Identify a credible local partner
- Establish close relationship with alumni who wield influence in respective markets – word of mouth referrals are the most effective means of publicity
- Adopt a strong social media presence
- Tailor content to different audiences
- Judge admissions based on merit – restrictive/blanket admission requirements can be a turn off to prospective students, especially as it pertains to English language proficiency and testing

### EVENTS

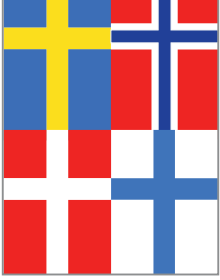
Virtual Education Fairs – Dates to be confirmed

### RESOURCES

- U.S. Commercial Service - Nigeria: <https://www.trade.gov/nigeria>
- EducationUSA
  - Abuja: Folashade Adebayo – Education Advising Supervisor – [AdebayoSX@state.gov](mailto:AdebayoSX@state.gov) +234-9-4614241
  - Lagos: Chinenye Uwadileke – EducationUSA Adviser – [UwadilekeCN@state.gov](mailto:UwadilekeCN@state.gov) +234-1460-3801
  - 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](mailto:CulturalAbuja@state.gov) or [CulturalLagos@state.gov](mailto:CulturalLagos@state.gov)

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# NORDIC COUNTRIES

## UNESCO Student Mobility Numbers

UNESCO	Denmark	Finland	Norway	Sweden
Total number of mobile students abroad <sup>1</sup>	6,041	10,946	15,964	15,092
Percent of population under 24 years of age <sup>2</sup>	28.8%	27.4%	30.0%	28.78%
Total population <sup>3</sup>	5,920,767	5,601,547	5,553,840	10,483,647

## OVERVIEW

The United States remains one of the most popular study destinations for Nordic students, and the number one destination outside Europe. Nordic students view studying abroad as an opportunity to enhance employability, 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.

According to the Open Doors 2022 report, 5,550 Nordic students studied in the United States in academic year 2021/22, a 26% increase compared to the prior year, which was heavily impacted. The Bureau of Economic Analysis' latest statistics show that Nordic students contributed \$185 million to the U.S. economy in calendar year 2021.

All levels of education are tax funded in the Nordics and thus tuition free for eligible residents. The Nordic educational systems range from highly ranked to world renowned, nearly all youth are enrolled in public schools and study English from the third grade or earlier. Nordic students 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. The Nordic countries mainly rate above the OECD average of performance in reading, mathematics, and science (PISA, 2018), and according to the Shanghai Ranking (2022), there are seven Nordic universities among the world's top 100.

Financial aid is also available to eligible Nordic students wishing to pursue a degree in higher education. The structure of the aid 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 higher education abroad.

Denmark, Finland, and Sweden are European Union (EU) members. Norway is not a member but is linked to the EU through the European Economic Area (EEA) agreement. The EU has strict laws governing the protection of personal data, including the use of such data in the context of direct marketing activities. For more information, see the full GDPR text (<https://eur-lex.europa.eu/legal-content>).

## SUB-SECTORS

In the academic year 2021/2022, just over 10 percent of **Danish** university students that studied abroad, studied in the United States. This was a small decrease from 2018/2019 and a more than 7 percentage point decrease from 2017/2018.

In the academic year 2021/2022, more than 6,900 Finnish university exchange students spent a semester or a whole academic year abroad; 250-300 of them chose to study at a U.S. higher education institution. 450-500 students were studying an entire degree in the United States.

The number of **Norwegian** students studying in the United States has steadily decreased since 2017. However, the number of students is bouncing back, and preliminary post-pandemic data from the Norwegian State Educational Loan Fund for 2022/23 suggest that the positive trend is continuing. The Norwegian Government published a White Paper on Student Mobility in October 2020. To normalize student mobility as a natural part of the Norwegian higher education system, students are presumed to participate in international studies, unless they make an active choice to opt out of an exchange period abroad. In contrast to this pursued policy, two recent developments may negatively impact student mobility numbers to the U.S. in the coming years: 1 - changes in mandatory health insurance for Norwegian students will increase costs in the coming years and 2 - a proposed reduction in stipends for Norwegians studying abroad in the 2023 national budget.

In the academic year 2021/22, UNESCO's statistics show that 15,092 **Swedish** students studied abroad and that of these, 18.9% or 2,851 studied in the United States. Factors impacting Swedish students studying abroad include shifting demographics, with smaller cohorts graduating from high school in 2019-23, as well as an unfavorable exchange rate. In addition, Swedish universities whose students participate in exchange programs are insured through the Swedish Legal, Financial and Administrative Services Agency (Kammarkollegiet). Despite this Swedish government authority providing extensive insurance coverage also in the U.S, there are higher education institutions that require enrollment in U.S. insurance programs. This significant increase in costs for the Swedish students can be a deterrent.

Nordic society is highly digitalized, and many students take advantage of the free online education platform available to them through Nordic university enrollment.



## Higher Education

### Denmark<sup>6</sup>

Denmark had a total of 238,518 domestic students in reporting year 2022.

Danish Students in the U.S.			
Academic Level	2020/2021	2021/2022	% Change
Undergraduate	363	461	27.0
Graduate	160	189	18.1
Non-Degree	26	390	1,400
OPT	59	51	-13.6

### Finland<sup>7</sup>

Finland had a total of 260,983 domestic students in reporting year 2019 (latest available information).

Finnish Students in the U.S.			
Academic Level	2020/2021	2021/2022	% Change
Undergraduate	293	293	0.0
Graduate	106	107	0.9
Non-Degree	10	34	240.0
OPT	76	46	-39.5

### Norway<sup>8</sup>

Norway had a total of 282,345 domestic students in reporting year 2022.

Norwegian Students in the U.S.			
Academic Level	2020/2021	2021/2022	% Change
Undergraduate	907	977	7.7
Graduate	215	272	26.5
Non-Degree	12	250	1,983.3
OPT	131	134	2.3

### Sweden<sup>9</sup>

Sweden had a total of 330,876 domestic students in reporting year 2022.

Swedish Students in the U.S.			
Academic Level	2020/2021	2021/2022	% Change
Undergraduate	1,401	1,506	7.5
Graduate	267	278	4.1
Non-Degree	69	256	271
OPT	308	312	1.3

### Totals

Total of Swedish, Norwegian, Danish and Finnish students in the U.S.			
Academic Level	2020/2021	2021/2022	% Change
Undergraduate	2,964	3,237	9.2
Graduate	748	846	13.1
Non-Degree	117	930	694.9
OPT	574	543	-5.4
Total	4,403	5,556	26.2

### Undergraduate

Most Nordic students studying in the United States do so at the undergraduate level.

### Community College

Many U.S. community colleges are represented by educational agents in the Nordics and are those that draw the largest percentage of Nordic students. According to a 2018 report by the Swedish Board of Student Finance (CSN) 1,200 Swedish students studied at community colleges in the United States in 2017. The most popular Community College programs 2010-2012 were the General and Economics Programs.

### Graduate Education

Contrary to their Nordic peers, Danish students generally study abroad during their master's degree program. In Denmark, international study at the graduate level in the United States increased by 18.1% in the academic year 2021/2022 as compared to 2020/2021. Historically, the number of Danish students studying at the graduate level abroad has been relatively stable.

## Secondary Education

Due to the difference in educational systems between the United States and Nordic countries, the demand for secondary education in the U.S. is limited. 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, with the below mentioned exception of Norway. A U.S. high school year can be integrated into a Norwegian diploma, but not into a Danish, Finnish, or Swedish diploma.

In Norway, credits can be considered and approved, but need to be confirmed in advance with the student's Norwegian school. Swedish students take a gap year when attending U.S. high schools, since U.S. high school grades are only acknowledged at the lowest passing level in Sweden, an option that is not attractive to most pupils.

Financial aid is generally not available to Nordic students for high school studies abroad, with the exception of Norway. In Norway, students whose U.S. high school credits have been confirmed and approved in advance, can be granted a scholarship from the government. Students are also required to pass their classes. Finnish students are able to apply for financial aid for international secondary education, but the requirements are stricter than for financial aid for local secondary education. Swedish students are eligible for financial aid at the secondary level if the equivalent education is not available in Sweden.

## Online Programs

There are many local providers of non-degree and certificate online programs in the Nordics. Online programs are typically targeted for individuals to further their professional development in a specific field. These programs include e.g. Professional Certificate Training and eMBA programs. In general, for these types of programs, Nordic students cannot receive financial aid.

## Research and Development

Research and development are high priorities for all Nordic governments. Some of the most well-known programs for research and development between the United States and the Nordic countries can be found below:

- American Scandinavian Foundation: [www.amscan.org](http://www.amscan.org)
- Thanks to Scandinavia Scholarship: [www.thankstoscandinavia.org](http://www.thankstoscandinavia.org)

## Denmark

- The Denmark-America Foundation: [www.wemakeithappen.dk](http://www.wemakeithappen.dk)
- Fulbright Center Denmark: [www.fulbrightcenter.dk](http://www.fulbrightcenter.dk)

## Finland

- Fulbright Finland: [www.fulbright.fi](http://www.fulbright.fi)
- Björn Savén's Finnish American Scholarship: [www.samsuomi.fi](http://www.samsuomi.fi)

## Norway

- EducationUSA Norway: [www.education.usa.no](http://www.education.usa.no)
- NORAM Scholarships: [www.noram.no](http://www.noram.no)
- U.S. - Norway Fulbright Foundation: [www.fulbright.no](http://www.fulbright.no)

## Sweden

- Fulbright Sweden: [www.fulbright.se](http://www.fulbright.se)
- The Sweden America Foundation: [www.sweamfo.se](http://www.sweamfo.se)

## Professional Training Services

There are many local providers of professional training services in the Nordics, both public and private. Among the most popular professional training services are management training, courses for entrepreneurs, courses in ICT, accounting, and marketing. Nordic customers could be trained virtually in areas where expertise is high and where the market segment is considered narrow, such as high tech. For U.S. companies interested in entering the Nordic market, the best option is to identify a Nordic partner to collaborate with. For more information, please contact the Commercial Specialists listed at the end of this report.

## Education Technology

The Nordic countries are among the most digitalized in the world and have specifically been working toward digitalizing education over the last decade. Many schools use Zoom or Microsoft Teams as platforms for distance teaching. For handing in assignments, posting course literature, and communicating with classmates and instructors, it is common in Nordics schools to use Learning Management Systems (LMS). Examples of such include Google Classroom, Canvas, Moodle, Athena/Itslearning, and Showbie. The decision regarding which LMS each school uses is often made on a municipality level, although many schools have the autonomy to make the choice independently. U.S. companies hoping to break into the Nordic LMS markets will need to adapt their products/services to each respective Nordic language and curriculum.

Online learning platforms are widely used in **Denmark**, though the market is dominated by few domestic providers. Because of the oligopolist structure of the market, it would be challenging for a new platform to enter the Danish market without establishing a strong partnership with one of the giants in the industry.

In **Norwegian** higher education, the local platform Itslearning is losing market share against its international counterparts such as Tieto and Showbie. The latter two are commonly used for elementary, middle and high school.

In **Finland** and **Sweden**, pupils are provided with personal devices as early as in elementary school. Throughout all levels of education, students are commonly given access to MS Office and use a wide array of LMS. In addition to the LMS platforms common to the Nordics, examples include, but are not limited to: Ping Pong, Fronter, and Vklass.

## OPPORTUNITIES

Nordic students are highly literate, proficient in English, have an open, international mind-set, and are interested in travel and engaging with other cultures. 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 an inspirational and high standard of learning. In the very fitness and sports oriented Nordic societies, college sports are an area for elite youths looking for scholarships in the United States.

The Nordic countries consistently rank in the top 10 in EF's English Language Proficiency Rankings. In 2022, Norway, Denmark, Sweden and Finland occupied the fourth, fifth, seventh and eighth spot rankings, respectively. Because of their very high English language proficiency, many Nordic students will not be attracted to basic English classes, but will seek educational opportunities in other, more specialized fields.

The EU goal is that 20% of all students should have experience from exchange studies or internships abroad when they graduate. The **Norwegian** government announced in 2017 and confirmed in a 2020 White Paper, that they have a long-term goal of 50% exchange/studies abroad. In **Sweden**, the student mobility goal has been set at 25% by the year 2025, yet of those that graduated in 2020/21, only 13% had studied abroad.

Engineering, and Business and Management are the two most popular study fields for both **Danish** and **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. **Swedish** graduates with the highest share of studies abroad included those with master's degrees in Business, Economics and Law as well as degrees in social sciences, law, business, and administration.

Programs/agreements where tuition can be reduced are attractive for Nordic students who want to partake in the American college experience while further improving their English language skills. Partnership and exchange agreements with Nordic universities are a common method for market entry.

## DIGITAL MARKETING STRATEGIES

Facebook, Snapchat, Instagram, Twitter, and LinkedIn are the most used social media platforms among students in the Nordic countries. These platforms each attract more than 70 percent of students from each country, making them ideal venues for digital marketing campaigns. Generally, Zoom, Microsoft Teams, Facebook Messenger and Whatsapp are the digital communication/messaging platforms of choice among Nordic schools and universities. Students search for extracurricular jobs on LinkedIn, union websites, private job platforms (e.g. CareerGate, Graduateland, Finn.no, Monster), and university-sponsored job platforms.

In **Denmark**, students generally learn about educational opportunities such as exchange through their academic institution or personal connections. It is common for universities to advertise their international programs by organizing student fairs and through student counseling.

**Finnish** schools often provide students with information about educational opportunities through visits or "open house" days in higher education institutions. During these days, high school and vocational school students visit university campuses to learn about degrees they are interested in. Higher education institutions advertise in social media and outdoors.

**Norwegian** and **Swedish** students often learn about the different educational routes through student fairs, high school guidance counselors, ads on social media or personal connections. There are also information meetings and student fairs held by local education agents reaching out to students regarding international higher education opportunities, sports scholarships etc.

The EU General Data Protection Regulation (GDPR), which governs how personal data of individuals in the EU may be processed and transferred, went into effect on May 25, 2018. The Nordic markets are bound by GDPR rules. Conducting advertising campaigns directed at EU markets or mentioning an EU member state in relation to the good or service could be relevant to U.S. companies. For more information, see full GDPR text (<https://eur-lex.europa.eu/legal-content/EN/TXT/?qid=1552662547490&uri=CELEX%3A32016R0679>).

## EVENTS

College Days Scandinavia: <https://collegedayfairs.org/>

### Denmark

EDU days

<https://edu-danmark.dk/edu-days>

### Finland

Educa Helsinki: Trade fair for education and training sector

Helsinki, 27–28 January 2023 and January 26–27, 2024

<https://educa.messukeskus.com/?lang=en>

Studia: Finland's largest youth study and career event

Helsinki, 28–29 November 2023

<https://studia.messukeskus.com/?lang=en>

### Norway

Ta Utdanning (2023 / 2024 dates and cities):

<https://www.tautdanning.no/studentfairs/about-the-fairs/>

### Sweden

Gymnasiemässan

Sweden's largest high school fairs generally held in October–November.

[https://www.gymnasiemassan.nu/?sc\\_lang=en](https://www.gymnasiemassan.nu/?sc_lang=en)

Saco Student Fair

Sweden's largest event for post-secondary education. In 2023, it will be held on November 29–30 in Stockholm and on December 6 in Malmö.

<https://www.saco.se/en/studentfair/>

## RESOURCES

### Denmark

- U.S. Commercial Service - Denmark: <https://www.trade.gov/Denmark>
- Danish Students Grant and Loan Scheme: <https://www.su.dk/english/>
- Fulbright Commission & Education USA: <https://fulbrightcenter.dk>
- Denmark-America Foundation: <http://wemakeithappen.dk>
- Ministry for Children and Education: <https://eng.uvm.dk>
- Ministry for Higher Education and Science: [https://ufm.dk/en?set\\_language=en&cl=en](https://ufm.dk/en?set_language=en&cl=en)
- The Danish Accreditation Institution: <https://akkr.dk/en/>

### Finland

- U.S. Commercial Service - Finland: <https://www.trade.gov/Finland>
- Fulbright Finland Foundation: <https://www.fulbright.fi>
- League of Finnish – American Societies (SAM): <https://samsuomi.fi/activities/>
- Ministry of Education and Culture: <https://okm.fi/en/frontpage>
- National Board of Education: <https://www.oph.fi/en>
- Social Insurance Institution in Finland, KELA: <https://www.kela.fi/web/en>

### Norway

- U.S. Commercial Service - Norway: <https://www.trade.gov/Norway>
- Association of Norwegian Students Abroad (ANSA): <https://www.ansa.no>
- Fulbright Norway: <https://fulbright.no>
- Norwegian Agency for Quality Assurance in Education (NOKUT): <https://www.nokut.no/en/>
- Norwegian Agency for International Cooperation and Quality Enhancement in Higher Education (DIKU): <https://diku.no/en>
- Norwegian Agency for Quality Assurance in Education, NOKUT: <https://www.nokut.no/en/>
- Norway America Association (NORAM): <https://noram.no/en/>
- Norwegian State Educational Loan Fund (Lånekassen): <https://lanekassen.no>

### Sweden

- U.S. Commercial Service - Sweden: <https://www.trade.gov/Sweden>
- Fulbright Commission: <https://www.fulbright.se>
- Study Now Studera.nu: <https://www.studera.nu/startpage/>
- Sweden America Foundation: <https://sweamfo.se/in-english/>
- Swedish Board of Student Aid: <https://www.csn.se/languages/english.html>
- Swedish Council for Higher Education: <https://www.uhr.se/en/start/>
- Swedish Higher Education Authority: <https://www.uka.se>
- Swedish Institute: <https://si.se/en/>
- Swedish Internet Foundation: <https://www.internetstiftelsen.se>

## Other

- CIA World Factbook: <https://www.cia.gov/the-world-factbook/>
- EducationUSA: <https://educationusa.state.gov>
- EducationUSA – Student Mobility Fact Sheets: <https://educationusa.state.gov/us-higher-education-professionals/recruitment-resources/student-mobility-fact-sheets>
- EU Country Commercial Guide: <https://www.trade.gov/country-commercial-guides/european-union-brexite?section-nav=9652>
- Industry and Analysis, Office of Supply Chain, Professional & Business Services: <https://www.trade.gov/professional-and-business-services>
- Institute of International Education, Open Doors Report: <https://www.iie.org>
- Organization for Economic Co-operation and Development (OECD): <https://www.oecd.org>
- U.S. Commercial Service: <https://www.trade.gov>
- U.S. Commercial Service Global Education Team: <https://www.trade.gov/education-industry>

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<sup>1</sup> UNESCO Student Mobility number

<sup>2</sup> CIA World Factbook

<sup>3</sup> CIA World Factbook

<sup>4</sup> BEA, Table 2.3. U.S. Trade in Services

<sup>5</sup> Swedish Higher Education Authority, 2020 Annual Report

<sup>6</sup> Open Doors, Research & Insights and Open Doors, Places of Origin

<sup>7</sup> Open Doors, Places of Origin

<sup>8</sup> Open Doors, Places of Origin

<sup>9</sup> Open Doors, Research & Insights and Open Doors, Places of Origin



# PAKISTAN

**Capital:** Islamabad  
**Population:** 247.6 million (2023 est.)  
**GDP (Purchasing Power Parity):** \$1.211 trillion (2021 est. in 2017 dollars)  
**Currency:** Pakistani Rupee (PKR)  
**Language:** Urdu (official), Punjabi 48%, Sindhi 12%, Saraiki 10%, Pashto 8%, Balochi 3%, Hindko 2%, Brahui 1%, English, Burushaski, other 8%

## UNESCO Student Mobility Number

Pakistan has 64,604 students studying abroad according to UNESCO.

## CIA World Factbook

55.31% of the population in Pakistan is under 25 years of age.

## OVERVIEW

The Government of Pakistan is working across various initiatives to provide quality education to all its citizens. English has traditionally been the primary language of instruction in private schools. Despite the government’s attempts to increase literacy, the literacy rate in Pakistan has remained steady at approximately 60 percent since 2014-15. The current literacy rate is 62.8 in 2020-21 with a 77 percent literacy rate in urban areas and 54 percent in rural areas.

The government’s 2021-22 Pakistan Economic Survey estimates that from 2020-21 there were 14.4 million students enrolled in pre-primary education, 25.7 million in primary education (grades 1-5), approximately 8.3 million in middle education (grade 6-8), 4.5 million in secondary education (grade 9-10), and 2.5 million in higher-secondary education (grade 11-12). The survey further indicates there were approximately 500,000 students enrolled in technical & vocational education, approximately 760,000 in degree-awarding colleges, and 1.96 million students in universities in 2020-21.

Pakistan has about 183,900 functional primary schools, 48,300 middle schools, 32,000 secondary schools, 6,000 higher/ secondary/intermediate colleges, and 3,800 technical & Vocational institutes in the country. Pakistan has over 200 universities and 3,000-degree colleges across the country.

## Secondary/Higher Secondary Education System

Pakistan’s national education system comprises twelve years of education spread across four levels: primary (grades 1-5), middle school (grades 6-8), matriculation (grades 9 and 10) and intermediate (grades 11 and 12). Many private schools offer the Cambridge education system in conjunction with the nationally mandated curriculum.

## Community Colleges

The concept of community colleges in Pakistan was initiated by IBA University Sukkur, with political support from the provincial Government of Sindh to establish the country’s first

community college, in 2010. IBA Community College has since grown to comprise a network of five separate community colleges spread across the Sindh province. IBA Community College also operates and oversees four public schools, three education management organization (EMO) schools, and one vocational training center in the province.

The Punjab Higher Education Commission launched a similar concept of community colleges and, in collaboration with the federal Higher Education Department, introduced an Associate degree program which, essentially, consisted of the provincial government converting about 800 existing colleges into Associate Degree schools. However, only four of these recently converted institutes offer students associate degrees.

## Degree Awarding Institutions/Universities in Pakistan

Pakistan has 218 universities in both public and private sector accredited by the Higher Education Commission (HEC) of Pakistan. Almost all major disciplines are taught in these institutions/universities.

## Technical & Vocational Education and Training (TVET)

Pakistan’s National Vocational and Technical Training Commission (NAVTTTC) is responsible for developing related policies, strategies, and regulations for the country’s Technical & Vocational Education and Training (TVET) system. Entities similar to the NAVTTTC operate at the provincial level: Punjab Vocational Training Council (PVTC), Punjab Technical Education & Vocational Training Authority (PTEVTA); Sindh Technical Education & Vocational Training Authority (STEVTA); Khyber Pakhtunkhwa Technical Education and Vocational Training Authority (KPTEVTA) and; Baluchistan Technical and Vocational Training Authority (BTEVTA). Each of these bodies offer courses covering various subjects and, additionally, several private organizations provide TVET-based programs.

## Incubation Centers

The concept of incubation centers is relatively new in Pakistan, with the first National Incubation Center (NIC) launched in 2016. There are now five government-initiated national incubation centers: NIC (<https://nicpakistan.pk>), NIC Karachi (<https://www.nickarachi.com/>), NIC Lahore (<https://niclahore.lums.edu.pk/>), NIC Peshawar (<https://www.nicpeshawar.pk/>), and NIC Quetta (<https://nicquetta.com/>). At the provincial government level, the Punjab has Plan 9 (<https://plan9.pitb.gov.pk/>) and Durshal (<https://www.facebook.com/kpitbdurshal/>) is an initiative by the Khyber Pakhtunkhwa government.

The Higher Education Commission (HEC) mandated that all higher education institutions (HEI) establish Offices of Research, Innovation, and Commercialization (ORICs), which led to the establishment of the Business Incubation Centers (BICs). Pakistan’s HEC supports and encourages HEIs to establish Business Incubation Centers (BICs) to strengthen the link between academia and industry.

## Government Initiatives and Policies:

Education has been one of the government’s top priorities in Pakistan. In 2014, the government launched the Pakistan 2025 Vision, a national strategic plan. The top two of its 25 goals center

on the education sector and, by 2025, seek to:

1. Increase primary school enrollment and graduation rates to 100 percent, and a 90 percent literacy rate.
2. Increase higher education enrollment from 7 percent to 12 percent and increase the number of PhD scholars from 7,000 to 15,000.

To support these goals, the government allocated approximately one percent of the total federal budget to education-related efforts which, in FY 2022-23 totaled PKR 90.5 billion (approx. \$404 million) of which PKR 74.6 billion (approx. \$341 million) was allocated for Tertiary Education Affairs and Services. The Higher Education Commission received PKR 44.174 billion (approx. \$197 million).

Over the last year, Pakistan introduced the Single National Curriculum (SNC) for grades 1-5, which has yet to be implemented. Under the SNC, all students, both public and private, would receive equal educational opportunities. The SNC is derived from the “One Nation, One Curriculum” concept. The SNC also seeks to address the needs of minorities by allowing them to study their own religion, i.e. Christianity, Hinduism, Sikhism, Baha’i, and Kalasha faiths for grade 1-5. However, its implementation requires a broad-based integrated consultation exercise among different education sectors.

The Higher Education Commission (HEC) of Pakistan introduced a policy in 2020 based on initiatives from Pakistan’s higher education institutions (HEIs), for Pakistani schools to establish international campuses as a way to improve their own standing, while enabling the HEIs to offer their education programs to an international market.

The HEC’s Travel Grant Program offers funding opportunities for Pakistani researchers and scholars. Under this program, the HEC will directly reimburse schools that admit participants that are accepted in their study or research programs, both within Pakistan and internationally. To remedy the traditional lack of attention given to the technical and vocational education and training (TVET) sector, the Ministry of Federal Education and Professional Training introduced a national “Skills for All” strategy in 2021, designed to address the needs of the unskilled and economically challenged segments of the population and enable them to participate in the economy.

There has been a marked increase in the number of Pakistani students pursuing education abroad. Pakistan introduced a policy, “Pakistani HEIs Offering Degree Programs in Collaboration with Foreign Universities”, in January 2020. The policy is designed to promote cross-border education opportunities and to increase collaboration between Pakistani and international schools. The program comprises various elements and opportunities for participants and partner institutions, including the awarding of a singular degree by a foreign partner university to participants completing studies in their home country. The HEC introduced a Faculty Exchange Program in 2019 to enhance teaching and research collaboration between Pakistani institutions and faculty members with international partner institutions.

### Market Insights

Per UNESCO statistics, nearly 65,000 Pakistani students are currently studying abroad. There are 8,772 Pakistani students studying in the United States (2021/22) as reported by Open

Doors. This figure reflects a 17.4 percent increase from the previous year. The trend of students’ enrolment from Pakistan went to negative during the pandemic. Pakistan ranks 16th in terms of the number international student in the United States in 2021/22, with the United States ranking as the second most preferred destination for Pakistani students.

A significant percentage of Pakistani students in the United States opt for public universities, with most pursuing business studies, accounting, engineering & technology, medical, general studies, and arts.

Those U.S. states with the highest number of Pakistani students are Texas, New York, Massachusetts, Illinois, and California.

### Other Attractive Destinations for Pakistani Students

Generally, Urdu and English are the languages of instruction in Pakistan. English-speaking countries have an edge over non-English speaking countries vis-à-vis Pakistani students. Other top-ranking destinations include Australia, United Kingdom, Germany, Malaysia, Kyrgyzstan, Canada, Central Asian Republics, Ukraine, Turkey, Saudi Arabia, Italy, and China.

### SUB-SECTORS

Open Doors Statistics 2021/22

- 3,635 students are enrolled in Graduate programs, an increase of 27.2 percent from the previous year.
- 3,241 students are enrolled in Undergraduate programs, an increase of 6.5 percent from the previous year.
- 293 students are enrolled in Non-degree programs, an increase of 190.1 percent from the previous year.
- 1,603 students are enrolled in Optional Practical Training (OPT) programs, an increase of 8.9 percent from the previous year.

### OPPORTUNITIES

There is a strong and growing demand for private education in Pakistan, with an increase in enrollments from urban areas. The leading, most reputable private schools in Pakistan often operate multiple campuses across the country, mostly in urban areas. There are only a handful of U.S. schools operating in Pakistan catering to the higher end of the economic demographic. Despite the high tuition fees charged by private schools, the Pakistani market remain largely untapped by U.S. institutions and represents an opportunity to compete against those schools offering the Cambridge system.

International schools rely heavily on student recruitment firms to attract Pakistani students. A significant number of Pakistani students turn to their student counselors and recruiting agencies when deciding where to pursue their education abroad and, as such, U.S. institutions can strengthen their presence by establishing a strong network of representation across the country.

Pakistani students, especially those in master’s and PhD programs have a strong preference

to pursue their studies abroad, opening the way for U.S. schools to attract this segment of the market through partnership programs with reputable local universities, especially in business education, engineering and technology, etc.

Collaboration programs include curriculum development, faculty development, research and development, and exchange programs. Since 2005, the U.S. Embassy in Pakistan has funded the largest Fulbright program in the world and, per the U.S. Educational Foundation in Pakistan (USEFP), plans to award over 200 Fulbright scholarships in 2023. Additionally, the Higher Education Commission of Pakistan, in partnership with the U.S. government, plans to fund 25 PhDs annually.

Pakistan hopes to achieve many of the priority goals laid out in its Pakistan Vision 2025 via the “U.S.-Pakistan Knowledge Corridor PhD Scholarship Program”, established in June 2015 by the U.S. and Pakistani governments. The ten-year plan includes awarding scholarships to 1,000 exceptional Pakistani students to attend U.S. universities.

Virtual Learning is an emerging concept in academia and the professional world. Students and professionals in Pakistan also choose distance learning for international certification, diploma, and degree programs for their career growth, though the tendency is not high. The trend toward distance learning is increasing in Pakistan post pandemic. Current inflation conditions in Pakistan might attract student’s preferences for virtual learning for their advanced education and professional skills.

## DIGITAL MARKETING STRATEGIES

Pakistani students rely heavily on social media as part of the decision-making process to explore international study options, i.e. Facebook, Twitter, Instagram, LinkedIn, Pinterest, and YouTube. Facebook and Instagram rank as the top social media sites in Pakistan, with YouTube proving to be an effective and widely used platform. Google is the top search engine amongst students, followed by other search engines (Bing, Yahoo, etc.). Rozee.pk is the most famous job search platform, followed by Bayt, Jobsalert.pk, Mustakbil, and Indeed. Schools in Pakistan use Google Classroom for online teaching and coordinating student assignments. Zoom is also popular for holding online classes.

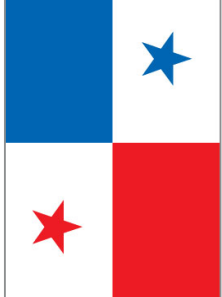
## EVENTS

Generally, student recruiting agencies hold education fairs and promotional events, with recruitment agencies representing their foreign institutions/universities.

- The United States Education Foundation Programs (USEFP) holds events and represents education institutions - <https://www.usefp.org/>, <https://educationusa.pk/signup/events.cfm>
  - USEFP South Asia tour - organized bi-annually
  - International Education Week – held annually in November
  - Outreach programs to various Pakistani universities
- Dawn Education Expo -- <https://educationexpo.dawn.com/>
- The News Education Expo -- <https://www.facebook.com/thenewseducationexpo/>

## U.S. COMMERCIAL SERVICE CONTACT

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# PANAMA

<b>Capital:</b>	Panama City
<b>Population:</b>	4.4 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$126.3 billion (2021 est., in 2017 dollars)
<b>Currency:</b>	U.S. Dollar (USD)/Balboas (PAB)

## UNESCO Student Mobility Number

Panama has 3,489 students studying abroad according to UNESCO.

## CIA World Factbook

42.15% of the population in Panama is under 25 years old.

## OVERVIEW

Education is the hope for many Panamanians. It represents a great possibility to overcome and prepare to have a better quality of life. Out of 10 Panamanians students 4 will attend University in Panama or abroad. Higher education has a key role in the development and expansion of capacities, through the professional and technical training of human capital, as well as in the creation of the knowledge necessary for innovation and increased productivity. The option of studying or not depends in many cases on the income level of the family. A greater offer of private universities, with more flexible plans, and a greater demand in the labor market of higher education influences students on taking a decision on what and where to study.

Panama's education sector is comprised of 954,233 (est. 2022) students. Of those, 840,497 attend public schools and an estimated 113,736 students attend private schools (2022). The total number of 12th graders for the 2022 school year was 38,555. The 8,757 high school seniors attending private schools are the ones who could study abroad. There are currently 35,000 students in higher education in 11 private universities in the country, and every year approximately 12,000 new students enter the University of Panama (government subsidized university) which has a total estimate of 93,628 students in 2022.

The school year in Panama runs from March to late November or early December. There are only six private schools that follow the same school calendar as the United States.

## SUB-SECTORS

### Higher Education

U.S. colleges and universities continue to be the preferred overseas destination for Panamanian students, though competition from Europe has increased in recent years. The number of Panamanian students in the United States totaled 1,910 for the 2021-2022 academic year, which is a 15.1% increase from the prior academic year. The top five U.S. states for Panamanian students are Florida, Massachusetts, Texas, the District of Columbia, and California.

Universities such as Florida State University in Panama, University of Louisville in Panama, South Florida University, Towson University, and Illinois State University have agreements for students to begin their college education courses in Panama and finish their studies in the United States. With the two-plus-two program, students spend two years in Panama studying and finish their studies with two years in the United States.

## OPPORTUNITIES

English language courses and higher education represent the best prospects within the study abroad market, and it's worth noting that 85% of all managerial positions are filled by candidates who have studied abroad. The most in-demand fields of study for Panamanian students in the U.S. are business administration, management, finance, banking, marketing, and engineering.

To improve English language education in public schools, the government of Panama created a teacher training program called Panama Bilingue. This program is designed for teachers and teacher trainees in Panama to develop and enhance their teaching skills and English proficiency. Since 2014, more than 10,000 teachers have been sent abroad, predominantly to the United States, Canada, and the United Kingdom in the Panama Bilingual Program, translating to an impact on 200,000 students in the country. The new trend for 2021-2022 is in-house English-language courses.

The following government of Panama institutions offer scholarships and financing for studying abroad:

**IFARHU (Instituto para la Formacion y Aprovechamiento de Recursos Humanos):** is a government agency that offers loans to finance higher education. Its programs include financial aid (to be paid back by the student) that allows students to start or continue higher education, either in-country or abroad. IFARHU has developed several partnership programs and scholarships with universities and colleges in the United States.

Scholarships from IFARHU are frequently given in the areas of: chemistry/science, electric engineering, biological sciences, economy, veterinary medicine, biomedical, arts, and science and computer engineering, which includes systems, software, networks, and more.

The contact for IFARHU is: [Maria.Panay@ifarhu.gob.pa](mailto:Maria.Panay@ifarhu.gob.pa) (<https://www.ifarhu.gob.pa/>).

**SENACYT (Secretaria Nacional de Ciencia y Tecnologia - Science & Technology Secretariat):** is another government agency that provides scholarships for Panamanians to study abroad in science- and technology-related fields. The scholarships are available to students who have been accepted to graduate programs (master's, PhD, and research) abroad. The scholarships are directed in the areas of demand for national development such as science, technology, research, economics, law, finance, and logistics, among others. The contact for SENACYT is Jane Saldaña: [jsaldana@senacyt.gob.pa](mailto:jsaldana@senacyt.gob.pa) (<https://www.senacyt.gob.pa/>).

**FULBRIGHT Program** U.S. Embassy Panama, is the flagship international educational exchange program that is sponsored by the U.S. government. It is designed to increase mutual understanding between the people of the United States and the people in other countries. The Fulbright Program offers grants to qualified Panamanian graduate students to study in the



United States. Panamanian scholars are eligible for Fulbright Scholar-in-Residence grants and Fulbright NEXUS, a year-long grant with a 2-3-month exchange component focused on applied research. For information on Fulbright, contact Sarah Ferguson: [FergusonS2@state.gov](mailto:FergusonS2@state.gov). The EducationUSA contact in Panama is Gladys Bernett [gbernett@educationusa.org](mailto:gbernett@educationusa.org)

### DIGITAL MARKETING STRATEGIES

Panama's total population is 4.3 million people, with a total of 5.27 million cellular phone lines, representing 119.5% of the population. This means that 652,000 Panamanians own more than one cell phone. The total number of Internet users is 2.94 million, 66.6% of the population, of which 3.45 million are active users of social networking sites.

The preferred Internet platform of students in Panama is Google, which gets 14.6 visits every 12 minutes. The most popular social media site used by students is Instagram with 1.95 million users. YouTube is by far the most popular video streaming platform in Panama. LinkedIn is the platform most used to search for job opportunities, with 940,000 users registered in Panama, accounting for 22.1% of the population.

Having a clear strategy that guides you to a successful student recruitment campaign in Panama will depend on several factors:

- School Counselors: They are your best ally, but are often overwhelmed with information from schools and agents, and more than likely will not answer your email if they don't know you. A good strategy is to meet them virtually or personally first. School tokens and marketing materials are a good idea to help them remember you.
- Agents: Local agents could be the best source of promotion for your institution, and you may want to partner with them, particularly because students and their parents usually seek advice from agents to complete the application process. You should be sure to vet agents before working with them as this is a known area of scams worldwide.
- Participate in local fairs, trade missions, and outreach events in high schools, public venues, and universities. It is highly recommended that outreach events target students and parents as their audience and all promotional material should be distributed in English and Spanish.
- Paid advertisement in local media, radio, Instagram, and Facebook could be your best strategy for marketing in Panama. You should also consider using WhatsApp content. WhatsApp is widely used by students and parents (and all of Panama). Radio is the most popular media outreach and can be done with low investment.

### EVENTS

- IFARHU Trade Fair - March 22, 2023 – annual event: <https://www.ifarhu.gob.pa/>
- EducationUSA Fair and programs

### RESOURCES

- U.S. Commercial Service – Panama: <https://www.trade.gov/panama>
- U.S. & Foreign Commercial Service Global Education Team: <https://www.trade.gov/education-industry>

- Industry and Analysis, Office of Supply Chain, Professional & Business Services: <https://www.trade.gov/professional-and-business-services>

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# PERU

<b>Capital:</b>	Lima
<b>Population:</b>	32.4 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$421.9 billion (2021 est., in 2017 dollars)
<b>Currency:</b>	Nuevo Sol (PEN)
<b>Language:</b>	Spanish (official) 82.9%, Quechua (official) 13.6%, Aymara (official) 1.6%

## UNESCO Student Mobility Number:

Peru has 35,379 students studying abroad according to UNESCO.

## CIA World Factbook:

42.64% of the population in Peru is under 25 years of age.

## OVERVIEW

Peru has approximately seven million school-aged (i.e., 5-16 years old) students and one million university students. Over the last decade, the country has made progress in education with enrollment levels increasing substantially and access to primary education reaching 70% of K through 12 aged students. However, while access has improved markedly, Peru has faced challenges in improving the quality of its education. Peru has a learning poverty rate of 56%; i.e., 56% of students at the age of ten cannot adequately read or understand simple text.

Education inequality also remains an issue with place of birth and socioeconomic status largely defining one's access and opportunities. Unsurprisingly, those from isolated or rural areas outside the main population centers suffer the most from this inequality.

## Impact of Covid-19

According to the World Economic Forum, Peru ranked 127th in the quality of its education system in 2020, down from 124th place in 2019 (latest available). The Covid-19 pandemic brought about perhaps the largest disruption to Peru's education system in over a century. The subsequent economic downturn resulted in a major reduction in educational investment, both privately and publicly, and a suspension of in-person learning forced students to learn from home. However, many students lacked access to even the most basic technology to effectively continue their studies, thus exacerbating education inequality.

## Internet Accessibility

According to Peru's National Institute of Statistics, in 2021 internet accessibility in metropolitan Lima was 75.1% while in the rest of the country it was 58.7%, figures that contrast with rural areas, where only 18.5% of households have this service.

## Education Trends

In 2021, with the appearance of the third Covid wave and its impact on the country's economy,

only 10% of the 350,000 students who transferred from private to public schools returned to their previous schools.

Hybrid education option (face-to-face and virtual) remain popular, which has increased the demand for equipment and technological solutions with high costs due to the rise in the value of the U.S. dollar. As part of the National Strategy for Educational Reinsertion and Continuity, the Ministry of Education (MINEDU) faces the unique challenges of promoting the return to school of the 124,533 students whose studies were interrupted between 2020 and 2021, as well as promoting the continuity of the 347,368 students who were enrolled but are at risk of dropping out in 2022. However, according to MINEDU in 2021 the rate of dropouts decreased from 3% in 2020 to 1.5% at pre-school and primary school levels.

## Public Spending on Education

The amount of money allocated to education in Peru's 2022 budget was nearly 8% greater than that allocated in 2021, totaling approximately \$9 billion or nearly 18% of the total budget, the highest in the last three years. In 2022, Peru was ranked 48th in the world in terms of annual investment in education, down from 46th place in 2020.

## SUB-SECTORS

### Higher Education

According to the Institute of International Education (IIE) Open Doors 2022 Report, the number of Peruvian students in the U.S. increased by 21.9 percent to 4,335. After the pandemic, many Peruvian higher education institutions have continued to offer online courses, as well as invest in technology and infrastructure to adapt their campuses to a new "hybrid" format. Many have expanded their course offerings, in part to address needed skills including data analysis, digital transformation, and digital marketing. One trend has been an increase in courses on online selling, as well as six-month creative marketing programs and other e-commerce-related courses.

### Secondary Education

As stated above, Peru has approximately seven million school-aged (i.e., 5-16 years old) students and one million university students, many of which come from the middle class, where families seek education that is affordable and practical. Public schools in Peru are managed entirely by MINEDU and are free of charge. Private schools are managed independently but operate under MINEDU regulations and directives and can charge widely different rates depending on a school's offerings, infrastructure, reputation, and teacher quality.

Private schools have been key to Peru's educational development and growth. According to a report by Apoyo Consultoría published in 2021, private regular basic education schools has reached 83% of the Peruvian provinces and compared to public schools, private schools have more qualified teachers, fewer students per teacher, more activities, and superior infrastructure. Thus, private schools often yield better academic performance and fewer dropouts (though challenges remain in finding enough qualified teachers). Futura Schools and Innova Schools, two private school chains that offer slightly more affordable options, operate in more than ten provinces, often offering remote education and providing better infrastructure, teaching, and

assessment than public schools. However, overall, the cost of private school education in Peru has and continues to be disproportionately high compared to average incomes and thus very much out of reach for a substantial portion of the population. Registration/enrollment fees often run into the thousands of dollars per pupil and monthly tuition costs can run into the hundreds of dollars for a country whose GDP per capita is just under \$7,000.

## OPPORTUNITIES

The private market for education in Peru presents several opportunities for U.S. firms. There are different school networks that provide innovative education and seek to cut the cost of higher education, as well as expand their geographical reach within Peru.

Universities in Peru are now focused on digitalization to provide better services to students in a hybrid environment. Universities are working to develop new laboratories, workshops, and academic software, as well as increase the number of classrooms to meet demand. Investments for adaptation also include new licenses for technology platforms, applications to track students, and even systems to improve air purification.

Because Peruvian universities are expanding their geographic reach, U.S. IT companies in the education field can offer partnerships through technological support, as well as best practices in education methods through special platforms and instructional learning design. Foreign universities, such as la Universidad de Tarapacá from Chile and the Instituto Tecnológico de Monterrey from Mexico, have begun investing in the Peruvian education market.

The Peruvian government has recently awarded a contract to the United Kingdom for the construction of 125 schools throughout the country that will benefit 142,000 Peruvian students. The U.S. Commercial Service at the U.S. Embassy has been working to connect potential U.S. sub-contractors to the UK implementation team.

## DIGITAL MARKETING STRATEGIES

During Covid, Peruvian students used Zoom, Google Teams, and MS Teams for their virtual classes and primarily relied on Google for research. The most common platform used to promote professional opportunities is LinkedIn and the most popular streaming platform used in Peru is YouTube.

The primary way Peruvian students receive information about educational opportunities abroad is through the international relations offices at their schools and universities. U.S. study state consortia and/or education institutions should utilize primarily LinkedIn and Facebook for their digital outreach.

## EVENTS

- International Congress of Educators 2023 (Virtual)- February 14-16, 2023: <https://congresodeeducadores.upc.edu.pe/>

## RESOURCES

- U.S. Commercial Service – Peru: <https://www.trade.gov/peru>

- Peruvian Ministry of Education: <https://www.gob.pe/minedu>
- Regional Education Center of Lima: <http://www.dreim.gob.pe/dreim/>
- Peruvian National Institute of Statistics: <https://www.inei.gob.pe/>
- National Council of Science, Technology and Technological Innovation: <https://portal.concytec.gob.pe/index.php/concytec/quienes-somos>

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# PHILIPPINES

<b>Capital:</b>	Manila
<b>Population:</b>	116.4 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$921.8 billion (2021 est., in 2017 dollars)
<b>Currency:</b>	Philippine pesos (PHP)
<b>Language:</b>	Filipino (official, based on Tagalog) and English (official); eight major dialects – Tagalog, Cebuano, Ilocano, Hiligaynon or Ilonggo, Bicol, Waray, Pampango, and Pangasian

## UNESCO Student Mobility Number

The Philippines has 26,162 students studying abroad according to UNESCO.

## CIA World Factbook

51.58% of the population in the Philippines is under 25 years of age.

## OVERVIEW

In 2016, the Philippines transitioned to a K-12 education system led by the Philippine Department of Education (DepEd) and the Philippine Commission on Higher Education (CHED). The transition to a K-12 model opened the door for international education institutions to market degree programs and universities to future graduates of the K-12 system. While previously only a small group attending elite private schools qualified for international programs, more students are now enrolling in tertiary education. This increases the potential for full-degree, short-term exchange, and certificate programs in the U.S.

The Philippines has 1,949 institutions of higher education. As of 2019, student enrollment was 1.8 million for private and 1.6 million for public institutions. Through the Quality Tertiary Education Act, public university tuition is free.

There is a strong presence of international schools in major cities such as Manila, Cebu, and Davao. In Manila, there are more than ten popular schools: Brent International School, British School of Manila, Chinese International School Manila, Domuschola International School, International School of Manila, The King's School Manila, Multiple Intelligence International School, Reedley International School, Korean International School Philippines, The Beacon School, Faith Academy, Australian International School, and Southville International School and Colleges. These international schools offer both International Baccalaureate (IB) and Advanced Placement (AP) programs, with annual tuition fees ranging from \$13,000 to \$15,000.

Most Filipino students studying abroad are from the local private education network. This network is composed of 18,350 schools. The Coordinating Council of Private Educational Associations (COCOPEA) is the umbrella organization of all private schools in the Philippines. The Association consists of the Philippine Association of Colleges and Universities (PACU); the Philippine Accrediting Association of Schools, Colleges, and Universities (PAASCU); Association of Christian Schools, Colleges, and Universities (ACSCU); Catholic Education Association of the Philippines (CEAP); and Technical Vocational Schools Association of the Philippines (TVSA).

In 2019, the U.S. Embassy in the Philippines and CHED signed a Joint Statement on Higher Education Cooperation to increase collaboration in institutional linkages, capacity building, and developing government/industry/academic ties. The joint statement recognizes the growing market, the possible economic rebound after the pandemic, and the transition to a K-12 system to allow more middle-class students to have the option of studying abroad.

## SUB-SECTORS

### Community College Programs and Boarding Schools:

Continues to be a niche market. Most Filipino families prefer direct university entry.

### Higher Education (Undergraduate and Graduate):

According to the IIE Open Doors Report, there were 2,907 Filipino students enrolled in the United States in the 2020/2021 academic year. The following year, there were 3,278 Filipino students enrolled in the United States for the 2021-2022 academic year (up 12.8%), including 1,545 pursuing undergraduate degrees, 1,236 seeking graduate degrees, 423 pursuing Optional Practical Training (OPT), and 74 in non-degree programs. The states with the highest number of Filipino students are California, New York, Texas, Massachusetts, Maryland, Illinois, Hawaii, Florida, Pennsylvania, and New Jersey. This mirrors locations with the largest Filipino communities in the U.S., as community and family support networks are determining factors in where Filipino students choose to study. With over 50% of the population aged 24 and younger, there will be a surge of youth positioned to enter higher education institutions.

### Online Programs and Education Technology:

The pandemic has greatly increased the demand for online programs and education technology tools across all academic levels for distance learning. However, this education model shift has experienced challenges, primarily due to lagging Philippine Internet connectivity. Speedtest Global Index lists the Philippines as having mobile Internet speed at 31.98 Mbps (global average is 54.53 Mbps) and fixed broadband speed at 58.73 Mbps (global average is 105.15 Mbps). For many years, Philippine Internet speeds were the slowest in Asia. By 2025, the number of mobile subscribers in the Philippines will reach 159 million and broadband subscribers will total 10.8 million. Legacy players Globe and PLDT-Smart will lead the 5G rollout and they have a combined total of 3,669 5G sites across the country. The Philippines only has 22,405 cellular towers compared to other ASEAN countries like Vietnam with 90,000 and Thailand with 60,000.

### Research and Development:

Research and development opportunities lie in academic programs relevant to the government priority disciplines of science, maritime, medicine, health, engineering and technology, agriculture, teacher education, hospitality, and architecture and town planning. Private and public institutions welcome partnership opportunities for research and accommodate visiting fellows and professors for knowledge exchange programs and capacity building.

## Professional Training Services:

The majority of the Philippine workforce is aged 25 – 54 years old. There are more than 900,000 Philippine micro-, small-, and medium-sized enterprises (MSMEs) seeking training to advance their business operations. Several training centers partner with private and public sector employers to offer technical training and programs. There is an increased interest in executive education programs and certificates among Philippine business leaders. The Philippine Business for Education, a USAID-funded education organization, and several others have urged the government to create a national plan for workforce competitiveness and skills development to support its growing economy.

U.S. education institutions need to consider several factors when marketing in the Philippines. First, with increased difficulty securing employment beyond the OPT period after graduation, returning students to the Philippines must attend well-known universities to be competitive in the local job market. Second, according to the Philippine Statistics Authority, the average individual yearly income for 2018 was \$6,260. While the middle class is growing, it will take time for overseas education to be commonly accessible. U.S. schools are primarily targeting the private school network, where students meet the academic and financial requirements for overseas education. Popular destinations for Filipino students include Australia, Canada, New Zealand, and Japan, all of which extend price-competitive offerings compared to the United States. Many competing countries offer generous scholarships, have active marketing campaigns, and are highly visible at local study abroad fairs, often with government subsidies. Finally, the commission provided to agents promoting competitor nation schools tends to be as large as 50% of the first year of tuition, while the U.S. standard is around 20%.

## OPPORTUNITIES

U.S. schools should be prepared to invest considerable time and financial resources into the Philippine market as competition is fierce. Schools without brand recognition should partner with local agents and universities and conduct aggressive marketing efforts. Connecting and visiting the university fairs of the international school community would also be an excellent first step.

Best practices for success include featuring successful Filipino alumni in marketing materials and providing career support for those wishing to remain in the U.S. after graduation. International recruiters also utilize incentives, including English placement exam waivers, scholarship programs, and student internships.

For the truly dedicated, creating a program that would qualify for a Philippine government scholarship may be an available marketing angle. This would require devising a price and program structure in close communication with CHED.

## DIGITAL MARKETING STRATEGIES

Filipino students are fascinated by education events promoted via social media. As a social media capital of the world, Filipinos actively use social media platforms for a whopping 10 hours per day, seven days per week. The best platforms to reach the most students are Facebook (72.5 million active users), Twitter (8.9 million active users), and Instagram (10 million active users). YouTube (11 million active users) is the most popular platform for social video streaming. LinkedIn's

usage (4 million active users) has also been growing among newly graduated students and young professionals.

## EVENTS

The U.S. Embassy in the Philippines organizes education fairs through EducationUSA. To see EducationUSA's scheduled virtual programs, please visit: <https://www.facebook.com/educationusa.philippines/events>

## RESOURCES

- U.S. Commercial Service - Philippines: <https://www.trade.gov/philippines>
- Philippine Department of Education (DepEd): <https://www.deped.gov.ph/>
- Philippine Commission on Higher Education (CHED): <https://ched.gov.ph>
- U.S. Embassy in the Philippines: <https://ph.usembassy.gov/>
- EducationUSA Philippines: <https://ph.usembassy.gov/education/>

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# POLAND

<b>Capital:</b>	Warsaw
<b>Population:</b>	37.9 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$1.318 trillion (2021 est., in 2017 dollars)
<b>Currency:</b>	Polish zloty (PLN)
<b>Language:</b>	Polish (official)

## UNESCO Student Mobility Number:

Poland has 26,495 students studying abroad according to UNESCO.

## CIA World Factbook:

24.6% of Poland's population is under 25 years old.

## OVERVIEW

Before the COVID-19 pandemic, Poland enjoyed mostly consistent and uninterrupted economic growth for more than 20 years, with some hiccups between 2008 and 2017, but has climbed ever since. Poland's GDP per capita, a major factor indicating the country's purchasing power, reached \$17,841 in 2020, representing 72 percent of the EU average. In 2020 public expenditures for education as a percentage of GDP was 5.2%, up from 4.6% in 2019, including 1% spent on higher education.

Due to COVID-19, Poland's economy changed dramatically, even though Poland was less affected than most of Europe. In 2020, Poland's GDP declined by 2.7 percent, and indications show a projected recovery and growth rate of 5.0 percent in 2021 and 2022. With a 55.4% vaccination rate, Poland is ranked 23rd in the European Union and is one of the most affected countries in terms of COVID-related deaths.

The societal effects of COVID-19 are severe, with the first lockdown in Spring 2020 exposing the shortcomings of Poland's school's organization, technology, and teaching methodologies. The situation has since improved and during the 2021-2022 school year, schools and universities generally stayed open and turned to online or hybrid teaching class-by-class when faced with rising COVID cases or a need to quarantine.

Public education is free at all levels in Poland, and the public system is supplemented by private and community schools and universities.

Poland's ruling government, elected in 2015, carried out educational reforms of the school and higher education systems. In Autumn 2020, government restructuring led to consolidated education responsibilities under the umbrella of a newly established Ministry of Education and Science. The government modified school programs and drafted regulations, which would undermine the autonomy of both public and private schools, however, these have yet to be discussed by Poland's parliament.

The school system is currently composed of eight years of primary school and four years of

general high school, or five years of technical high school. Middle schools were phased out in 2019, and high schools will continue to teach a combination of old and new programs until the end of the 2021/2022 school year.

Of the approximately 14,500 primary schools, more than 90% are public. Poland's 7,600 secondary schools have a 77% public, 23% private mix. 87.7% pupils attend high schools that culminate with final exams, allowing the students to apply for university education. An International Baccalaureate certificate is offered by 44 general secondary schools, making an IB certificate available to just over 1% of all pupils. Over the last decade, private schools experienced a 17% growth. The interest in private education boomed in 2020 as the repeated lockdowns of schools revealed the shortcomings of Poland's public educational system, technology, and quality of teaching. Monthly tuition fees for non-public schools vary from less than \$300 for community schools, to \$600-\$700 for private schools, and \$2,700 or more for high-end international schools. Approximately 40% of Polish families with children attending private schools have a yearly income exceeding the equivalent of \$40,000, confirming the population's growing interest and ability to invest in private education. The turbulence caused by recent education reforms further increased the interest in private schools, as well as education opportunities abroad.

More than 45.7% of Poles between the ages of 30-34 attended higher education institutions, making Polish society one of the best educated in the region and surpassing EU education targets.

The Polish government's reforms of the higher education system, launched in 2018, aimed to improve the potential of Polish science and the quality of education of students and doctoral students. The reform also changed funding rules for universities and academic career paths and was supposed to focus on strengthening the ties between the science and business. Though recently introduced, Poland's higher education reforms are currently under review. The Minister of Education and Science issued a statement that Polish universities should focus on formative, intellectual and educational work and that the system should steer toward "Polonization" which raised concerns in academia.

There are more than 300 higher education institutions located in 97 Polish cities, educating approximately 1.2 million students in total, including 150,000 postgraduate students. Most students, 75%, study at public universities. In 2021, more than half of students chose technology studies, such as information technology, automation, and engineering. Other popular faculties included green technologies, psychology, management, medicine, and law.

The number of students has decreased slowly but steadily over the last decade. The unfavorable demographic trend is expected to continue and become fully visible in 2022, once the former higher education cycle has been phased out. Polish universities continue to benefit from the interest of foreign students, the majority of whom come from the Ukraine (50.1% of all foreign nationalities), Belarus, India, Norway, Germany, and Sweden. In 2019, there were 899 students from the United States, but last year the number dropped by 75.6%, to 219 students.

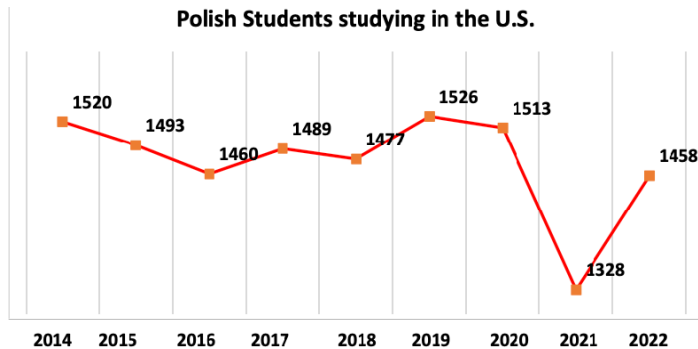
English is the most common foreign language taught at schools at 1-12 grades and in universities. It is commonly spoken by youth and young adults that have attended high school or higher education institutions. Private language schools offering English courses and summer programs are also popular, and it is estimated that some 240,000 students study English at these schools.

## SUB-SECTORS

### Higher Education

Poland was the 9th largest country in the European Union for sourcing students to study in the U.S., and the outbound mobility ratio of Polish students stands at 1.8%. Most Polish students take advantage of European programs, making Western Europe the primary destination for studying abroad. The United States is the fifth most popular destination country for Poles studying abroad, following the United Kingdom, Germany, the Netherlands, and Denmark. Following the United Kingdom's exit from the EU, the number of EU citizens studying there dropped by 43%, from 49.6 thousand in 2020 to 28.4 thousand in 2021. In Poland's case, the number of students studying in the UK decreased by 73%, or 8,520 students.

According to the 2022 Open Doors Report, in the 2021-2022 academic year there were 1,458 Polish students studying in the U.S., a 10% increase over the previous year. The latest academic year still does not enjoy the pre-pandemic level of students, but certainly is closing the gap. The top five destination states are New York, California, Massachusetts, Florida, and Pennsylvania.



#### Students in the U.S. by U.S. Institution Type

Students in the U.S. by U.S. Institution Type	%
Associate's (2-year) Colleges	9.54%
Baccalaureate (4-year) Colleges	6.03%
Doctorate-granting Universities	66.53%
Master's Colleges and Universities	13.97%
Special Focus Institutions	3.93%
Public Institutions	52.89%
Private Institutions	47.11%

Sector	%	Number	% Year-to-year Change
Undergraduate	49.4	685	4.4%
Graduate	33.4	477	7.4%
Non-Degree	3.3	122	177.3%
OPT	13.9	174	-5.49%

Source: 2022 IIE Open Doors Report

### Undergraduate

According to the Open Doors Report, almost half of all Polish students in the U.S. pursue undergraduate studies.

### Community College

Despite EducationUSA and Fulbright's promotion efforts, knowledge of community college opportunities are still limited in Poland.

### Graduate Education

Polish students usually obtain institutional support for graduate studies in the U.S., and seldom bear the costs themselves. Graduate education and post-graduate studies have strong support from the Fulbright Commission. Since 2016 the Polish-U.S. Fulbright Commission has facilitated links between Polish and U.S. higher education institutions through Study Abroad initiatives funded by State Department Study Abroad grants. Additional details about this program are available on the Fulbright website (<https://en.fulbright.edu.pl/news/>).

Partnerships between Polish and U.S. universities, and their faculties, provide for curriculum cooperation, exchange of lecturers, and student exchanges or scholarship programs.

### Secondary Education

The reform of Poland's education system has resulted in an increased interest in a non-public education. It has also contributed to growing interest in investing, on a commercial basis, in studying abroad.

The United States is the second most popular destination for high school pupils studying abroad, following the United Kingdom. Polish youths usually attend school abroad allowing them to master their English language skills, including specialized vocabulary necessary for their future academic experiences.

### Online Programs

Before COVID-19, online programs were not very popular in Poland, though universities allowed up to 60% of programs to be delivered through the e-learning system.

Some universities offer comprehensive online studies of selected programs to Polish students, thanks to a direct cooperation between U.S. and Polish universities. Despite cost-efficient e-learning abroad gaining popularity, it is generally less attractive to students than regular studies.

### Research and Development

Recent higher education reforms and new innovative laws are aimed at boosting the scope and quality of research and development programs. In 2019, ten research universities were selected to receive increased education subsidies in 2020-2026, allowing them to further improve the quality of research and education programs and allow them to compete and cooperate at foreign markets.

The Polish government also introduced robust tax incentives for commercial enterprises investing in research and development, encouraging them to closely cooperate with universities.

### Professional Training Services

In cooperation with business, universities started offering dual education as well as degrees based on project implementation programs.

The development of new technologies and shortages of qualified employees has forced employers to provide training services for their existing and future personnel, especially in the emerging professions.

### OPPORTUNITIES

As of November 11, 2019, Poland became eligible for the visa waiver status, making the United States more accessible for Polish citizens. Even though Polish students still need visas to study, participate in the Summer Work Travel Program and other exchange programs, it is expected that a boom in tourist and business travel will eventually translate into increased interest in acquiring U.S. education, though COVID-19 related travel restrictions have delayed expected gains.

Poles hold U.S. education in a high esteem, although, they need more information to successfully navigate the U.S. education system, admission and visa procedures, and scholarship opportunities. EducationUSA programs run by the U.S. Embassy in Warsaw, the U.S. Consulate in Krakow and the Poland Fulbright Commission, play an instrumental role in promoting U.S. education, while the U.S. Commercial Service assists individual U.S. education institutions with help in locating Polish partners, schools, universities, or commercial companies, through cost-effective, fee-based services.

The main barriers preventing more Polish students from studying in the U.S. are the cost of study and the physical distance. Most Polish students seek direct scholarship opportunities or academic exchange programs.

Specialized travel agencies and language schools recruiting for short-term education programs usually also include offers for regular studies. There is a very limited number of education agents that are active in Poland. These are mainly international organizations working in multiple markets.

Polish universities are usually reluctant to support student recruitment, unless this is done under their existing university-to-university cooperation or a wider program. Polish universities usually list their foreign education partners on their websites.

### DIGITAL MARKETING STRATEGIES

Facebook is used by almost all young people in Poland. For them, Facebook is the most important source of information, making it a good tool for education recruitment purposes.

The majority of Polish universities use the locally developed USOS platform, by the Inter-Academic Information Technology Center, of which most universities are either a shareholder or associated member. Universities usually interface their individual platforms with USOS.

### EVENTS

- Poland International Education Fair, Warsaw - March 10-11, 2023 (annual event): <http://perspectives.pl/>
- There are also many smaller fairs with regional outreach; information is available upon request.

### RESOURCES

- U.S. Commercial Service – Poland: <https://www.trade.gov/poland>
- Ministry of Education and Science: <https://www.gov.pl/web/edukacja-i-nauka>
- National Agency for Academic Exchange (NAWA): <https://nawa.gov.pl/en/>
- National Science Center (NCN): <https://www.ncn.gov.pl/en/>
- Polish-U.S. Fulbright Commission: <https://fulbright.edu.pl/>
- Kościuszko Foundation's Program for Advanced Study, Research and/or Teaching: <https://thekf.org/>
- EducationUSA advising centers in Poland: <https://pl.usembassy.gov/education-culture/>  
<https://educationusa.pl/>
- The National Centre for Research and Development: <https://www.gov.pl/web/ncbr>

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# PORTUGAL

**Capital:** Lisbon  
**Population:** 10.2 million (2023 est.)  
**GDP (Purchasing Power Parity):** \$347.6 billion (2021 est., in 2017 dollars)  
**Currency:** Euro (EUR/€)  
**Language:** Portuguese (official)

## UNESCO Student Mobility Number:

Portugal has 22,807 students studying abroad according to UNESCO.

## CIA World Factbook:

24.52% of the population in Portugal is under 25 years old.

## OVERVIEW

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 2022 Institute of International Education Open Doors Report, there were 1,030 students from Portugal studying in the United States during the academic year 2021-2022, an increase of 30% percent compared with the previous year. However, the proportion of the Portuguese population between the ages of 15-24 years has been declining over the past ten years.

In the 2021-2022 academic year, 477 students from Portugal enrolled in the United States at the undergraduate level, followed by the graduate level with 311 students. Optional Practical Training (OPT) followed with 136 students and, lastly, 106 students enrolled in non-degree programs, such as English language or short-term studies.

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.

## SUB-SECTORS

- U.S. – Portuguese university student exchange programs
- High school exchange programs
- ESL – English as a Second Language intensive short-term programs
- Distance and e-learning

## OPPORTUNITIES

Portuguese students are primarily interested in the following types of programs in the U.S.:

- U.S. universities and community colleges
- Undergraduate, graduate, and master's degree programs
- Summer camps
- Online programs
- Boarding schools
- Optional Practical Training (OPT)

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 with school counselors and other stakeholders.
3. Identify local agents/distributors/partners.

## EVENTS

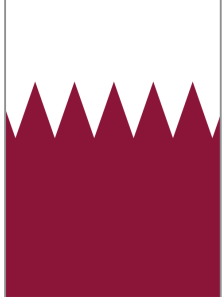
- Study Abroad Portugal  
Lisbon and Porto, Portugal  
February 2023/October 2023  
<http://www.studyabroadportugal.pt/>
- Futurália  
Lisbon, Portugal  
March 2023  
<http://futuraia.fil.pt/>

## RESOURCES

- U.S. Commercial Service, Portugal: <https://www.trade.gov/portugal>
- 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: <https://www.fct.pt/>

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# QATAR

<b>Capital:</b>	Doha
<b>Population:</b>	2.5 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$249.6 billion (2021 est., in 2017 dollars)
<b>Currency:</b>	Qatari Rial (QAR)
<b>Language:</b>	Arabic (Official), English (commonly used as second language)

## UNESCO Student Mobility Number

Qatar has 8,054 students studying abroad according to UNESCO.

## CIA World Factbook

24.62% of the population in Qatar is under 25 years old.

## OVERVIEW

Education in Qatar continues to expand due to a strong government commitment to create “an educated population,” with substantial investment in the sector, a rising youth population, and continued increases in school and university enrollment. According to Boston Consulting Group, the private education market is expected to grow to \$2.4 billion by 2023. Qatar National Vision 2030 highlights the state's goal to expand and improve the education system and promote the “Qatarization” of the workforce, which would require Qatari students to gain sufficient knowledge and skill sets from their educational institutions. As of the 2020-21 academic year, there were 168 secondary schools (private and public) serving 53,422 students. Public schools are free-of-charge, generally separated by gender, and are preferred by Qatari families for primary and secondary levels.

In public and private institutions, the levels of formal learning are pre-primary, primary, preparatory, and secondary schools. The recent trend in Qatar's education is towards choosing private institutions, the enrollments of which are likely to grow compared to the present-day preference of public institutions. Private schools offer multiple international curricula (like IB and A-levels) and focus on studies in English, which potentially prepares Qatari students for study abroad education, specifically in the United States. There are 338 private schools and 212 public schools operating in Qatar in the 2021-2022 academic year.

Qatari male students are increasingly aiming to study in private institutions and a majority of the female students are enrolling in public institutions in Qatar with a focus on studying subjects in Arabic and pursuing a national curriculum. Therefore, the majority of Qatari nationals in public universities are women, while more men either pursue careers or choose to go abroad for higher education. There were 32 universities in Qatar with over 41,000 students registered during the 2020-2021 academic year.

Qatar hosts six American universities (Carnegie Mellon University, Weill Cornell Medicine, Georgetown University, Virginia Commonwealth University, Texas A&M University, and Northwestern University), which accept both nationals and expatriate students. A key player in these international collaborations is Qatar Foundation, a non-profit that stays at the

forefront of Qatar's educational development and consists of more than 50 entities working in education, research, and community development. Higher education covers many areas, such as the humanities, medicine, science, engineering, education, and Islamic studies. However, there is a lack of diversity within master's degree programs, including professional development opportunities like law school, or specialized schooling like aviation. Qatar is also actively looking to increase the enrollment rates for post-secondary education and raise the graduation rates for nationals studying STEM (math, science, and engineering, specifically) and IT disciplines. These trends and needs are shaping the demand in this market and could be used as recruitment opportunities for U.S. institutions.

The Supreme Education Council (SEC) and Ministry of Education & Higher Education (MOEHE) are the two government agencies supporting and regulating education in Qatar.

## Government Scholarships

A distinctive feature of the Qatari education system is the availability of scholarships for Qatari nationals for a selected number of universities for undergraduate and graduate studies. The scholarships are provided by the state of Qatar. The Ministry of Education & Higher Education is the regulatory body that supervises the process of choosing the institutions where Qataris are eligible to receive financial support. The list of universities approved for the scholarships can be found here: <https://www.edu.gov.qa/en>

## SUB-SECTORS

### Higher Education

There were 500 students (Qatari Citizens) studying in the United States during the 2021-2022 academic year, according to the IIE Open Doors Report. This is a 11% decrease than the previous year.

The academic level segmentation is as follows:

- Undergraduate Education: 394 students, a 14.2% decrease since the last academic year.
- Graduate: 79 students, a 8.2% increase since the last academic year.
- Non-Degree Studies: 17 students, a 41.7% increase since the last academic year.
- Optional Practical Training (OPT): 10 students, a 44.4% decrease since the last academic year.

Qatari study abroad students preferred to pursue studies in engineering, economics and accounting, business administration, computer science, politics, international and public relations, medical and paramedical specialties, and law.

### Secondary Education

Statistics are not available for education abroad for secondary school students. While it is evident that Qataris prefer public education within the country, the growth of enrollments is larger for private institutions. The enrollment rate at public institutions has remained consistent.

## Online Programs

There could be opportunities in e-learning and executive education.

## Research and Development

There is a Research, Development, and Innovation (RDI) division of the Qatar Foundation (QF). QF is the main center for research and development in Qatar and includes the Qatar Science & Technology Park, which consists of the Arab Innovation Academy, multiple accelerators, and innovation hubs that provide funding for projects. Qatar Foundation, Qatar University, and research centers of private education institutions (for example the Center of International and Regional Studies at Georgetown University in Qatar) comprise the main R&D facilities in the country. Given the small size of the country and population, the research and development opportunities are limited.

## Professional Training Services

Most professional training services are provided by private entities, with several exceptions that can be found in ministries and government institutions, such as the Educational Training and Development Center supervised by the Ministry of Education and Higher Education (MOEHE). Some of the most popular fields of training are air transport, management training, occupational safety, oil and gas, IT, and teacher training. Overall, Qatari society seems welcoming of the specialization and training opportunities that would give students a chance to stay in Qatar during their school and university years to advance in their fields of study. Considering the national priority for an educated population and capable workforce, training for new and popular areas of studies such as business, STEM, and IT, could have a potential for success in Qatar.

## Education Technology

Qatar has been at the forefront of digital transformation and a top country in the region for technological advancement. However, there could be opportunities for advanced and disruptive technology in the EdTech segment.

## OPPORTUNITIES

The best prospects in Qatar are in recruitment for programs at the undergraduate and graduate levels. There could be opportunities for community colleges, particularly to recruit potential students from the expatriate community. In addition, collaborative opportunities may exist for companies in skills development and training for the workforce in the energy, hospitality, and ICT sectors. The government has plans to establish multiple K-12 schools, which may provide opportunities for school management and school operation service providers.

## DIGITAL MARKETING STRATEGIES

The popular platforms used by students are Google Duo, Google Meet, Zoom, and MS Teams. The most popular social media sites used by students in Qatar are WhatsApp, Instagram, Google+, Twitter, Snapchat, YouTube, and Facebook. LinkedIn is used by students to search for job opportunities. YouTube and TikTok are popular for streaming videos. Local and international education institutions use various social media sites to provide information to potential students and recruit students for higher education.

## EVENTS

- Qatar STEM Education Summit 2023 - This event aims to bring together educators across the region to effectively deliver STEM curriculum. The organizers are hosting a series of localized events, culminating with flagship event on Digital Learning and STEM Education and are inviting educators and edtech providers from around the world.

Date: March 14-15, 2023.

Location: Doha, Qatar

<https://www.qatarsummits.com/>

- University Expo Qatar 2023 - a comprehensive two-day exhibition attended by students age 16+ who are considering their higher education options, as well as their parents Oct. 23-24, 2023

<https://informaconnect.com/uniexpoqatar/>

## RESOURCES

- U.S. Commercial Service – Qatar: <https://www.trade.gov/qatar/>
- Ministry of Education & Higher Education: <https://www.edu.gov.qa/en/Pages/HomePage.aspx>

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# ROMANIA

<b>Capital:</b>	Bucharest
<b>Population:</b>	18.3 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$588.4 billion (2021 est., in 2017 dollars)
<b>Currency:</b>	Romanian Leu (RON)
<b>Language:</b>	Romanian (official) 85.4%, Hungarian 6.3%, Romani 1.2%, other 1%, unspecified 6.1% (2011 est.)

## UNESCO Student Mobility Number

Romania has 31,486 students studying abroad according to UNESCO.

## CIA World Factbook

24.43% of the population in Romania is under 25 years old.

## OVERVIEW

Since Romania joined the EU in 2007, its economy has grown tremendously; the country's GDP has risen by 40% since then, but the Government's expenditures on education are still lower than the EU average of 4.76%. In 2020 Romania's public expenditure on education as a percentage of GDP was 3.7%, according to UNESCO, making a steady climb year over year and inching closer to the European average.

At present, Romania's priorities include investments in infrastructure, healthcare, education, job creation, and small- and medium-size enterprise development. The country's economic growth has been one of the highest in the EU since 2010. In 2021 Romania experienced a 5.9% GDP growth rate based on data from the World Bank. Rising GDP has also created a greater demand for quality education and overseas studies.

As the country has transitioned from the former Soviet influence towards European Union standards, the Romanian education sector has reformed considerably, modernizing the school curricula towards competence-based learning. All significant responsibilities for the educational strategy are concentrated within the Ministry of Education (<http://www.edu.ro>), which directly steers the implementation of national policies. Education in Romania is based on a tuition-free, egalitarian system. The education system is administered at the national level by the Ministry of Education, at the central level in cooperation with other ministries (e.g., Ministry of Public Finance for financing schools) and institutional structures subordinated to the government, and at the local level by county school inspectorates. The education system of Romania today resembles the French education system

Based on the Ministry's national policies, education in Romania is compulsory up to 14 years of age, from the last year of pre-school education to grade 12 of Upper Secondary Education. Kindergarten will gradually become compulsory by 2030. In the school year 2020-2021, half of the school-age population was found in primary and secondary education (54.6%) and about one-third in high-school and pre-school education (21.1% and 17.3%, respectively).

The Romanian education system is divided into early education (0-6 years), primary education,

secondary education, tertiary non-university education, and higher education, as in many other European countries.

## Quick facts:

- Education: 14 years compulsory
- Academic year: September – June

Romania ranks 6<sup>th</sup> in the all-time medal count at the International Mathematical Olympiad as well as ranking 6<sup>th</sup> in the all-time medal count at the International Olympiad in Informatics.

Private education is becoming increasingly popular in Romania naturally leading to a growth in private schools.

The Romanian – American Fulbright Commission was established in May 1993. It administers educational and cultural exchanges and scholarships to candidates from across the country. More than 3,000 students, professors, and researchers from Romania and the U.S. have benefited from this program so far.

The Information Resource Center of the U.S. Embassy in Bucharest reaches out to Romanian audiences and provides information on U.S. government policies; U.S. history, culture, and values via cultural and educational programs; professional workshops; and the network of American Spaces in Romania, including 10 American Corners and 26 American Shelves.

Learn more here: <https://ro.usembassy.gov/education-culture/information-resource-center/>.

## Examples of International Baccalaureate Schools in Romania:

- Lycee Francais Anna de Noailles – Bucharest <https://lyceefrancais.ro>
- Maria International School – Bucharest <https://www.misb.ro/>
- Verita International School – Bucharest <https://www.veritaschool.ro/>
- American International School of Bucharest \*<https://www.aisb.ro/>
- Bucharest Christian Academy – Bucharest <https://www.bcaromania.org/secondary>
- France International School of Bucharest <https://efibucarest.org/?lang=en>
- Bucharest-Beirut International School <https://bbischool.ro/>
- International British School of Bucharest <https://ibsb.ro/>
- British School of Bucharest <https://www.britishtschool.ro/>
- Mark Twain International School – Bucharest <https://www.facebook.com/marktwainschool.ro/>
- Avenor College – Bucharest <https://www.avenor.ro/ro>
- Cambridge School of Bucharest and Cambridge School of Constanta <http://www.cambridgeschool.ro/>
- Acton Academy – Bucharest <https://actonbucharest.ro/>
- Olga Gudynn International School – Bucharest <https://olgagudynn.ro/en/>
- Nikolaus Lenau Theoretical High School – Timisoara <https://nlenau.ro/>
- Paradis International School – Iasi <https://paradis-college.ro/>
- Royal School in Transylvania – Cluj Napoca <https://royalschool.ro/>

\* (The American International School of Bucharest AISB currently enrolls over 900 students from 63 nationalities and has a faculty and staff of over 290 dedicated professionals representing 13 countries. Two expansion plans are currently underway.)

## SUB-SECTORS

### Higher Education

In Romania, higher education is provided by universities, institutes, study academies, schools of higher education, and other similar establishments, collectively referred to as higher education institutions (HEIs) or universities. HEIs can be state-owned or private.

Romania follows the Bologna scheme, i.e., most of its tertiary-level programs are comprised of three cycles: a three-year bachelor's degree, followed by a two-year master's degree, and a three-year doctoral degree. However, some programs take longer to complete, for example those in engineering fields (four-year programs) or some bachelor's and master's degrees are combined into a unique, six-year program (medicine and architecture). Master's programs are a prerequisite for admission to Ph. D programs. Vocational education is handled by post-secondary schools, with programs lasting two years.

According to data published by the Ministry of Education and the National Institute of Statistics there are 54 public universities (or state universities, including those with a military profile) and 35 private universities accredited or authorized to operate provisionally, located in 24 Romanian cities. There were 560,490 students enrolled in the academic year 2020-2021. Among the most attractive specializations, business administration and law easily stand out (24.8% of all students), followed by engineering, processing industry, and construction with 19.5% of all students.

The European Credit Transfer System (ECTS) and European Qualifications Framework (EQF) are in use in accredited Romanian universities as follows:

- Bachelor's Diploma awarded to graduates of the first higher education cycle
- Engineering Diploma granted by polytechnic universities
- Architect Diploma awarded to graduates of the School of Architecture
- Master's Diploma awarded to graduates of the second higher education cycle who have successfully defended their dissertation work
- Doctoral Diploma (Ph.D) awarded after completion of the third higher education cycle, plus independent research
- Non-Degree Graduate Certificate

The above-mentioned statistical sources indicate that the employment rate of recent tertiary graduates is increasing, supported by developments in both the labor market and education. The rate in Romania was 76.7% in 2020, narrowing the gap to the EU average of 78.7%.

According to the IIE Open Doors Report there were 872 international students from Romania at U.S. higher education institutions in 2021-2022, an increase of 20 students from the previous year.

### Secondary Schools

The Romanian secondary education system includes:

- *Colegiu Național / National College* — the most prestigious high schools in Romania, most are part of at least one international program for teaching foreign languages such as Cervantes, SOCRATES, Eurolikes, etc.
- *Liceu Teoretic / Theoretical High School* — An average high school, providing one or more of the available academic programs. They are very common and vary greatly in quality and results.
- *Colegiu Militar / Military College* — three military high schools are administered by the Ministry of National Defense. They are extremely strict and legally they have the same regime as army units, being considered military installations. All students are members of the Romanian Army and abide by Army rules and regulations.
- *Colegiu Economic / Economic College or Colegiu Tehnic / Technical College* — A high school with an academic program based on services or technical education and good results. An admission average of 8 points on a scale of 1 to 10, or 80% score, is usually enough.
- *Liceu Tehnologic / Technological High School* — A high school usually offering academic programs in the field of technical or services education. Some are regarded as being the least appealing way to earn a high school diploma and thus access to university, while others are very well regarded, as they give highly useful and well-regarded diplomas.
- *Învățământul Profesional-Dual / Dual Vocational Education* - a three-year high school, focused on vocational training and apprenticeship. Graduates may then transfer to a technological high school and graduate with a Baccalaureate diploma. Very few students attend such schools, and parents are often skeptical about them.

As regulated by the national policies of the Ministry of Education, public institutions, such as primary, secondary, and high schools, don't charge tuition. To motivate and stimulate students, public institutions offer scholarships based upon academic merit or disadvantaged backgrounds. To pass the National Baccalaureate Exam (BAC) and receive their Baccalaureate diploma, students must score a minimum of five out of ten points for all tests. The arithmetic mean of the student's written grades must be no lower than six.

According to European standards, whether or not a student has passed the Baccalaureate exam, all high school graduates who have graduated in their native language and passed language tests of foreign languages studied in high school (English or French, for example), as well as the digital IT competency tests, receive certificates documenting their proficiency levels in these areas.

### Online Programs

Prior to Corvid 19 leading universities in large cities were already providing online education programs, mainly as an alternative for many students with full-time jobs. Starting in 2020, when emergency status was imposed by Romanian authorities because of the pandemic, online education came into force throughout the country, in all public and private education systems, from primary school to higher education institutions. Unfortunately, the emergency status had negative consequences on a significant number of students by partially or totally limiting their access to education.

The Ministry of Education estimates that about 510,000 students do not have access to online school. However, data from the Romanian NGO, "Save the Children", shows that 38.1% of

children are at risk of poverty or social exclusion, suggesting that the number of students who do not have access to online schooling is much higher than official estimates.

A roadmap for the Romanian digital education reform is included in the 2021-2027 Digital Education Action Plan launched by the European Commission together with EU's members states. It should help ensure a fair transition to a digital society and economy for all. Digital competences have become key for citizens to participate in today's social, economic, and civic life. Therefore, the 2021-2027 Digital Education Action Plan proposes three priorities:

1. Making better use of digital technology for teaching and learning
2. Developing relevant digital skills and competences for digital transformation
3. Improving education systems through better data analysis and foresight

## Research and Development

Romania has one of the lowest public research expenditures in the EU. In 2020, Romania allocated about 0.15% of GDP to research, but new governmental coalitions that took office after December 2020 vowed to boost total R&D spending to 2% of GDP by 2024.

The country remains relatively poor compared to other EU countries, with very large regional imbalances in education. Within this context, the higher education system could represent an important driver to promote innovation and generate human capital. However, due to outmigration, the number of students enrolled in universities has been declining and private investment in R&D remains relatively low.

Two European programs to which Romania is eligible to submit research and innovation projects to access funds include the Horizon Europe program, which has a budget of EUR 95.5 billion for the period 2021-2027, and the Euratom 2021-2025 Research and Training Program with a much smaller \$1.4 billion fund for the period 2021-2025. The latter program focuses on nuclear safety improvements.

## OPPORTUNITIES

### “Educated Romania” Program

Best prospect opportunities for U.S. universities, R&D institutions, or training and education service providers in Romania are found within the “Educated Romania” Program, which began in 2016. According to the information released by the Romanian Presidential Administration, President Klaus Iohannis launched the final report of the “Educated Romania” Program in July 2021. The document includes the results from the largest public study of education in the country's post-communist history (64 public institutions, NGOs, local/central authorities; more than 12,400 individuals), as well as expert conclusions following debates held with the participation of national and local authorities and civil society stakeholders (15 events organized and hosted by the presidential administration, over 80 events or projects under “Educated Romania” patronage). Comprised of other studies, white papers, and public policy documents, the report builds on conclusions of four other public policy recommendations concerning (1) the teaching career; (2) education management; (3) social justice; and (4) access to early education.

Some of the public measures recommended had previously been included in the National Defense Strategy for 2020-2024, under an extended definition of defense. However, over the project's last year, the report underwent final adjustments to integrate lessons learned in the context of the COVID-19 pandemic and requests formulated during one last round of public consultations with members of the parliamentary committees and NGOs, all with the aim of increasing the report's legitimacy and level of public and political acceptance. The document's overall vision also takes into consideration social, economic, and environmental transformations across the globe, concerning aging populations, jobs of the future, and emerging markets.

Even though the Romanian president does not have legislative powers under the Romanian Constitution and can therefore only issue policy recommendations, the aims and agenda set by “Educated Romania” for the reform of the Romanian education system by 2030 were adopted by the Government of Romania in September 2021. A draft action plan setting actual measures, timeframe, responsible government agencies, and the implementation budget was first drafted by the Ministry of Education during the same month and is currently under public consultation prior to being published.

It is important to highlight that a significant number of reforms are secured through financial agreements between the Romanian state and the European Union via structural funds and the Recovery and Resilience Facility. These funds are meant to mitigate the economic and social impact of the coronavirus pandemic and to make European economies and societies more sustainable, resilient, and better prepared for the challenges and opportunities of the green and digital transitions. In the next programming period, 2021-2027, Romania will have access to EUR 31 billion split across four instruments: the European Regional Development Fund, the European Social Fund+, the Cohesion Fund, and the Just Transition Fund, plus the budget earmarked for the National Recovery and Resilience Plan.

Romania has an estimated budget of EUR 29.2 billion under the Recovery and Resilience Facility, with EUR 14.2 billion in grants and EUR 14.9 billion in loans. Out of the entire National Recovery and Resilience Plan submitted by Romania, the ‘Educated Romania’ project is supported through an allocation of EUR 3.6 billion. Additionally, a Renovation Wave will allocate EUR 405 million for public pre-university education institutions to secure safety standards.

Other reforms already in the implementation phase as part of the current programming period, which is to end in 2023, address curriculum reform (with a total worth of EUR 42.8 million); professionalization of teaching (approximately EUR 28 million); and supporting at-risk children (EUR 61 million). A larger share of funds is dedicated to the digitization of education (EUR 140 million).

Concurrent with the view espoused in the “Educated Romania” report, the World Bank's Romanian chapter is currently drafting a country report with actions necessary to extend private-public partnerships to deepen reforms and grow the network of early education facilities.

Economic developments over recent years seconded by the depopulation of large industrial sectors -- especially in the areas most dependent on skilled workforce -- prompted authorities and private sector representatives to engage in extensive dialogue. The mutually acknowledged need to develop a stronger cooperation model to reform vocational and technical training

led to fiscal measures being introduced to incentivize private investments in apprenticeship programs, while more and more companies are partnering with such secondary schools.

### Scholarships for Romanian Students

Best prospect opportunities for international academic exchange and research programs for Romanian students, professors, and researchers started in 1991, when Romanian higher education institutions began to be involved in international programs such as TEMPUS, SOCRATES, LEONARDO da VINCI, CEEPUS, and FULBRIGHT, as well as WORK, STUDY & TRAVEL in USA. Other examples of scholarships for Romanian students include:

- Erasmus+ Program <https://erasmus-plus.ec.europa.eu/resources-and-tools/erasmus-charter-for-higher-education>
- Erasmus Mundus (Medical Master Studies) <https://www.innovativemedicine.eu/application-and-admission/application-procedure>
- GoEuro European Study Abroad Scholarship <https://www.european-funding-guide.eu/scholarship/goeuro-scholarship>
- Trendhim Scholarship <https://www.trendhim.co.uk/csr/trendhim-scholarship>
- Alimardan bay Topchubashov Scholarship <https://www.ada.edu.az/>
- Japan WorldBank Graduate Scholarships <https://www.worldbank.org/en/programs/scholarships>

Summer courses in the U.S., as well as year-round, online courses are ways for U.S. universities and schools to attract Romanian students. Summer English language programs fit well with Romania's semester structure. Distance learning courses and e-learning are gaining popularity.

To assist U.S. universities in promoting themselves in Southeast European (SEE) countries, the U.S. Commercial Service in Romania has supported and co-organized regional virtual education programs in previous years, the latest one in October 2019, in cooperation with the U.S. Commercial Service offices in Albania, Greece, Bulgaria, Serbia, and Slovenia. This Virtual Education Fair attracted over 120 educational consultants, university representatives, and college counselors from the SEE region.

### DIGITAL MARKETING STRATEGIES

In Romania there are 15.35 million Internet users, which is around 80% of the entire population. The number of Internet users in Romania increased by 485,000 (+3.0%) between 2021 and 2022.

There were 27.41 million mobile connections in Romania in January 2022. The number of mobile connections in Romania increased by 1 million (3.9%) over the previous year. The number of mobile connections in Romania in January 2022 was equivalent to 144% of the total population.

Facts:

- 19.30 million – total population
- 26.63 million – mobile connections (144%)
- 15.35 million – Internet users (88%)
- 13.30 million – active social media users (69.7%)

YouTube, Facebook, and WhatsApp are the most popular social media platforms in Romania. Other popular social media platforms include Facebook Messenger, Instagram, and Twitter, to a lesser degree.

For online classes the preferred online platforms are: Zoom (25%), Google Classroom (23%), and WhatsApp (20%). Other platforms used include Messenger (13%), Skype (3%), and Discord (2%).

The top five platforms used by students to search for job opportunities in Romania are: Best Jobs, Locuri de Munca in Cluj, eJobs, Cariera Noua & My Job.

The platforms used by in-country schools and competitor countries to reach students in Romania are online or in-person international education fairs. Romanian students and parents receive information about educational opportunities through the Internet, emails, and international education fairs organized virtually or in-person.

As they build on their digital outreach strategies in Romania, U.S. state study consortia and education institutions are advised to use the Fulbright Commission in Bucharest, the American Corners in 10 cities throughout the country, social media marketing, alumni videos/success stories, and partnerships with local recruitment agents.

### EVENTS

- World Education Fair  
Bucharest, Romania  
September 30 – October 1, 2023  
<https://www.educationfair.nl/event/world-education-fair-romania/>

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# SINGAPORE

**Capital:** Singapore  
**Population:** 5.9 million (2023 est.)  
**GDP (Purchasing Power Parity):** \$578.2 billion (2021 est., in 2017 dollars)  
**Currency:** Singapore dollars (SGD)  
**Language:** English, Mandarin, other Chinese dialects,

### UNESCO Student Mobility Number:

Singapore has 21,666 students studying abroad according to UNESCO.

### CIA World Factbook:

27.81% of the Singaporean population is under 25 years of age.

## 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 5.9 million, has been the choice destination for around 50,000 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, around 23,000 Singapore 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 remain flat compared to other countries such as Australia, UK, 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 2022 Open Doors Report, Singapore has 3,901 students studying in the U.S.; this number has increased by 9.6% compared to the previous year and corresponds to the increased student visa numbers being issued to Singaporeans as shown in the table below:

See figures table below at each September for the 5-year period ending in 2022:

Year	Number of Visas Requested by Students	% Year-to-year Change
2018	2,853	3.9%
2019	2,859	0.0%
2020	1,131	-60.4%
2021	1,392	23.1%
2022	2,733	96.3%

Out of the 3,901 students, 43% are pursuing undergraduate courses and 33% pursue 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 include:

- Cybersecurity
- Media and Animation
- Hospitality and Tourism
- Sports Science and Medicine
- Business Analytics and Digital Economy
- Logistics and Supply Chain Management
- Advance Manufacturing & Engineering

Singapore's education market emphasizes, supports, and values higher education and skills upgrading. The government awards funding for Singaporean workers to continually receive training to upgrade and sharpen their skill sets and be more knowledgeable in a globalized economy. 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. In line with the long-term commitment to continuing education and training, the government has topped-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 USD 370) per Singapore citizen with a periodic top up has also given by the Singapore Government for Skills Future development and training.

The mandatory school age for Singaporeans begins at 7 years. A pre-school education is catered for children under 6 years to prepare them for formal schooling. There are more than 1,800 pre-schools and the Ministry of Education plans to increase this number. This is to emphasize the importance of starting a child's learning journey early, so they have a head start when they begin mandatory school.

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 an 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 becoming popular, especially, with MNCs and larger companies in Singapore, although competition is high. 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 values 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 online 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, there are Singaporean students who 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.

Singapore schools are not new to digital learning, however given the pandemic much importance has been given to remote learning. The Singapore government is pushing universities and other schools to come up with innovative digital strategies to better prepare students for more digitized jobs in the future.

## DIGITAL MARKETING STRATEGIES

The internet is widely used in Singapore, making digital marketing a useful tool. Students in Singapore use Google and government websites the most when doing research online, as well as libraries when researching off-line. Social media is also popular among students, with Instagram and Facebook being the main platforms used. Instagram and YouTube are the two main websites used to stream videos.

When seeking job opportunities, students turn to LinkedIn, GlassDoor, and Education Fairs. In-country schools and competitor countries use a variety of methods to reach out to students, including letters in the post, emails, education fairs, and visits by university staff. Additionally, students and parents in Singapore receive information about educational opportunities

through flyers, education fairs, newspapers and various publications, the Internet, Facebook, and blogs. U.S. study state consortia and educational institutions looking to reach Singaporeans should consider using interactive flyers, digital marketing, and alumni videos.

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

- Jack Study Abroad: <https://www.studyabroad.sg/global-university-expo-20200919/>

## RESOURCES

- U.S. Commercial Service - Singapore: <https://www.trade.gov/singapore>
- Department of Statistics Singapore: <https://www.singstat.gov.sg/modules/infographics/population>
- Workforce Singapore: <https://www.ssg-wsg.gov.sg>
- Ministry of Education: <http://www.moe.gov.sg>
- EducationUSA: <https://educationusa.state.gov/centers/educationusa-singapore-advicing-center>

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# SOUTH AFRICA

**Capital:** Pretoria  
**Population:** 58 million (2023 est.)  
**GDP (Purchasing Power Parity):** \$790.62 billion (2021 est., in 2017 dollars)  
**Currency:** South African Rand (ZAR)  
**Language:** Whilst English is generally regarded as the primary medium of instruction in education, South Africa does have 11 other official languages: Zulu (22.7% of the population), Xhosa (16%), Afrikaans (13.5%), English (9.6%), Northern Sotho (9.1%), Tswana (8%), Sotho (7.6%), Tsonga (4.5%), Swati (2.5%), Venda (2.4%) and Ndebele (2.1%)

## UNESCO Student Mobility Number

South Africa has 12,295 students studying abroad according to UNESCO.

## CIA World Factbook

44.74% of the population in South Africa is under 25 years of age.

## OVERVIEW

### General

South Africa is the most advanced, diversified, and productive economy in Africa. Boasting one of the most pro-business environments on the continent, South Africa is a logical and attractive option for U.S. companies seeking to enter the Sub-Saharan African marketplace. The country covers 1.22 million square kilometers and is the world's largest producer of platinum, vanadium, chromium, and manganese.

### Economy

South Africa has enjoyed relative macroeconomic stability but is facing increasingly strong headwinds due to the 2020 Covid-19 pandemic. The economy expanded by 0.8 percent in 2018 and by 0.2 percent to \$350 billion in 2019. However, the Covid-19 pandemic has led to a 7 percent contraction to \$302 billion in 2020; as a result, GDP per capita has dropped to 2005 levels. Inflation is low and interest rates are at record lows.

The maturity of the South African economy is reflected in the mix of economic sectors:

- Primary (including agriculture, fishing, and mining): 10 percent
- Secondary (manufacturing, construction, and utilities): 21 percent
- Tertiary (trade, transport, and services): 69 percent

Pre-Covid-19 (academic year 2019-2020), the number of South African students studying in the United States increased to 2,224 students, placing South Africa 5th in Sub-Saharan Africa in terms of students studying in the U.S. With 16.8 percent of the total South African population aged between 15- 24, there is significant potential to increase this number.

The South African education system is divided as follows: Pre-high school (7 years), High school (6 years), Lower secondary (also known as the "senior phase") lasts through grade 9 and is mandatory. Students typically begin lower secondary at age 12 or 13. The curriculum for lower secondary school includes the home language, an additional language, mathematics, natural science, social science, technology, economics and management sciences, life orientation, and arts and culture. Students receive 27.5 hours of classroom instruction per week. Upper secondary, also known as further education and training (FET), lasts through grade 12, and is not compulsory. Entry into this phase requires an official record of completion of grade nine. Just as in the intermediate and senior phases, this phase comprises 27.5 classroom hours per week. The academic year calendar runs from mid-January to early-December.

Traditionally the recommended times for U.S. education institutions to visit South Africa are May, July (private schools), August (public schools), and September.

## SUB-SECTORS

Sector (Open Doors Report 2022)	Percentage By Sector % (2021-2022)	% Change In Sector (From previous year)
Undergraduate	58.6% (1,394)	16.1%
Graduate	27.3% (650)	20.4%
Non-Degree	2.0% (46)	7%
Opt	12.0% (285)	-3.4%

Source: IIE Open Doors Report

Study in the U.S. by Institution Type	
Associate (2 year) Colleges	11.6%
Baccalaureate (4 year) Colleges	10.4%
Doctorate – granting Universities	57%
Masters Colleges and Universities	15.9%
Special Focus Institutions	5.1%
Public Institutions	48.3%
Private Institutions	51.7%

## Top 5 Study Destinations for South African Students in the U.S.

- New York
- California
- Massachusetts
- Texas
- Pennsylvania

## OPPORTUNITIES

The United States - South Africa Higher Education Network is a coalition of universities, foundations, and government agencies dedicated to building a brighter future by strengthening ties among our institutions of higher education. U.S. community college associate degrees are now recognized as an equivalent to the National Diploma in accordance with the South African Qualification Authority.

There are some South Africa government ministries that sponsor students or provide living stipends for study abroad in certain fields, namely, the Department of Agriculture and the National Arts Council. Few private organizations fund scholarships to the U.S., but the National Research Foundation and First Rand Bank's Laurie Dippenaar Scholarship have funded graduate students.

## DIGITAL MARKETING STRATEGIES

Most students in South Africa use social media platforms. Social media has gained a lot of interest in the young population of the country and has become the go-to tool for disseminating information. The most popular social media sites are Facebook, Twitter, Instagram, LinkedIn, WhatsApp, WeChat, and Snapchat. These are the same platforms used by in-country schools and competitor countries to reach and recruit students. Facebook Live, YouTube, and Instagram are the most popular for streaming videos in South Africa. When searching for information, students typically use the Google search engine and similar research tools.

## Increased Collaboration with South African Institutes

There is great appetite amongst South African Higher Education Institutes for collaboration with regards to curriculum development, research, as well as student and faculty exchange programs.

## EVENTS

- Worldview Education Fairs: <https://www.worldviewevents.com/>
  - Worldview Education Fair - Capetown, South Africa – Oct 5, 2023
  - Worldview Education Fair - Johannesburg, South Africa – Oct 7, 2023
- Various embassies education fairs

## RESOURCES

- U.S. Commercial Service – South Africa: <https://www.trade.gov/south-africa>
- Universities South Africa: <https://www.usaf.ac.za/>
- Council on Higher Education: <https://www.che.ac.za/>
- South African Department of Education: <https://www.education.gov.za/>
- The International Education Association of South Africa [IEASA]: <https://www.ieasa.studysa.org/>
- The United States - South Africa Higher Education Network: <https://www.ussahighereducationnetwork.org/>

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# SOUTH KOREA

**Capital:** Seoul  
**Population:** 51.9 million (2023 est.)  
**GDP (Purchasing Power Parity):** \$2.289 trillion (2021 est., in 2017 dollars)  
**Currency:** South Korean won (KRW)  
**Language:** Korean

## UNESCO Student Mobility Number

South Korea has 100,610 students studying abroad according to UNESCO.

## CIA World Factbook:

22.77% of the Korean population is under 25 years of age.

## OVERVIEW

In South Korea, education is a high priority for Korean families. Success in education is important culturally and seen as an important pathway to greater achievements. Korea represents the third largest source of foreign students matriculating at U.S. universities, comprising 4.3 percent of total international students in the U.S. The Open Doors Report from the Institute of International Education (IIE) indicates that a total of 40,755 Korean students were enrolled in U.S. institutions for academic year 2021-2022. On a per capita basis, Korea sends the third-most students to the U.S. from Asia. In 2020-2021, Korean students in the U.S. studied engineering (21%), STEM majors (20%), business management (16%), fine and applied arts (5.6%), and social studies (8.4%).

A degree from a well-known institution is a status symbol in Korea and essential to finding the “right job at the right company.” Coveted spaces in Korea’s top schools are open to competition from all students, but attainable by only a few. Many talented students instead opt for the best schools outside of the country and obtain a diploma from an accredited overseas school. Japan is the second popular destination from Korea, followed by Australia, Canada, and the U.K.

A decade ago, Korean students with U.S. degrees enjoyed advantages in the Korean job market; however, this is no longer the case. Korean universities have grown in prestige and students are opting to stay in-country to build connections. U.S. schools are competing with the top Korean schools. However, English language skills, internship experience, vocational training, or a degree from a mid-ranked state university in the U.S. is still seen as providing a competitive advantage to secure full-time employment. This translates into opportunities for U.S. schools to recruit some of Korea’s most talented students. Koreans remain willing to spend a substantial portion of their income on education.

While this market is very attractive to a wide swath of U.S. education service providers, it has become, over the last few years, an increasingly challenging market. The number of Korean students studying in the U.S. has trended slightly downward in the last five years, and it significantly decreased by 21 percent during the COVID-19 pandemic. While the U.S. remains by far one of the most preferred overseas destinations, especially for undergraduate studies, fewer Korean students are going to the U.S. because there are simply fewer younger people

and partially because of the rising number international schools in Korea attracting students who otherwise might have gone abroad. Korea is a rapidly aging society, with one of the world’s lowest birth rates at 0.8 children per family. In addition to this demographic change, the recent economic slowdown at home is also contributing, to some degree, to the declining number of Korean students studying in the U.S.

Although a university’s reputation is still a key element for Korean students seeking degree programs, recently more Korean students are employing strategies to lower the costs of their education by studying at community colleges before transferring to four-year schools or state universities with less expensive living costs. Korea’s dynamic and constantly evolving education market is best accessed via the speed and power of referrals and information that flow by word-of-mouth. Good opportunities do exist, albeit with decreasing numbers of U.S.-bound Korean students, when U.S. educational entities are prepared to compete in a highly sophisticated, demanding, and brand-oriented market.

Total Korean Students Studying in the United States					
Year	2017/18	2018/19	2019/20	2020/21	2021/22
South Korea’s Rank	3	3	3	3	3
Korean Students	54,555	52,250	49,809	39,491	40,755
% Percentage Change	-7.0	-4.2	-4.7	-20.7	3.2
No. of New International Student Enrollment	271,738	269,383	267,712	145,528	261,961

Source: IIE Open Doors Report

Korean Students Studying in the U.S.						
Year	Academic Level	2017/18	2018/19	2019/20	2020/21	2021/22
Number of South Korean Students by Academic Level	Undergraduate	27,638	25,161	23,415	17,743	18,262
	Graduate	15,572	15,518	15,219	14,238	14,915
	Non-Degree	3,631	3,497	3,301	840	1,555
	OPT	7,714	8,074	7,874	6,670	6,023
Total No. of South Korean Students	Total	54,555	52,250	49,809	39,491	40,755

Source: IIE Open Doors Report

## SUB-SECTORS

### Undergraduate and Graduate Programs

According to Open Doors 2022, 44.9% of Korean students studying in the U.S. are enrolled in undergraduate courses and 36.1% are enrolled in graduate courses. The best prospects for attracting Korean students are in higher education programs of undergraduate and graduate level study. The perception and prestige of U.S. universities, academic research, and the chance to gain English proficiency remain strong draws for Koreans, despite challenges, such as the declining Korean population and the growing appeal of China as a study abroad destination.

### Intensive English Programs

Korea is the fifth-leading country of origin for students studying in intensive English programs in the U.S. Korean students take intensive English programs to improve their English language skills for academic and professional reasons. The numbers have declined over the years due to the increased availability of English language training programs by native English speakers in Korea. However, Korean students continue to opt to study in the U.S. because most Korean parents view English education as a top priority and prefer immersion in an English-language speaking environment.

### Education Technology

The education technology market is advancing in Korea and is a growing sector with potential for advanced education technology suppliers. Korea is among the world's most digitally connected countries and developments are progressing in EdTech areas, including mobile learning environments, online learning analytics for instructional design, and artificial intelligence for science research. EdTech has been strongly supported by the government for decades and forms a significant part of government strategy to reform the education system to focus on developing students' skills and using the latest cutting-edge technology.

Korea is known for having one of the fastest Internet networks in the world and the Internet penetration numbers reach 96 percent. In 2020, the number of mobile connections was equivalent to 118 percent of the total population and social media penetration stood at 87 percent. The proliferation of Internet use has contributed to the increased usage of social media channels. The country's search traffic is dominated by local search engine platforms such as Naver and Daum, which control 93 percent of the market. Unlike the U.S., Google is not an often-used search engine. The most popular social media sites for students in Korea are Kakao, Naver, Instagram, Twitter, Facebook, and YouTube. Kakao Talk is the most popular messaging app and social network that Korean students use to interact. The increasingly hyper-connected student population uses mobile devices during the exploration phase of seeking out education programs and the majority make their first visits to websites on their mobile devices.

U.S. schools should create new channels of engagement with Korean students by utilizing the popular local platforms and social media channels to share valuable information on their programs and increase their visibility to this audience. Digital marketing is very relevant for the higher education sector since students have the highest Internet consumption rate of any other group.

## OPPORTUNITIES

To attract Korean students and penetrate the dynamic and highly competitive Korean education market, U.S. education institutions should take an approach based on a more permanent, consistent, and profound commitment to the market. Korean parents are increasingly savvy about how they acquire information on educational opportunities for their children. Traditional ways of recruiting students, such as hosting school information sessions and participating in trade fairs are less effective than they were in the past. Education recruitment agents or local representatives are utilized less. U.S. education institutions should consider employing a combination of online and off-line promotional campaigns. Building people-to-people networks through alumni advocacy, as well as developing and broadening exchange programs, which could, in turn, raise the profile of the U.S. institution, and help U.S. schools attract Korean students to the United States.

## EVENTS

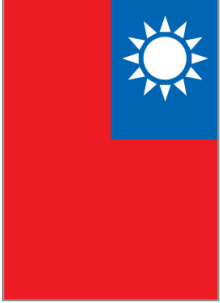
- Korea Study Abroad & Emigration Fair (for latest events and activities): <https://www.uhak2min.com/en/>
- The MBA Tours (global events): <https://www.thembatour.com>
- Education Korea 2024 – January 17-19, 2024: <http://www.educationkorea.kr/main/main.php>

## RESOURCES

- U.S. Commercial Service - South Korea: <https://www.trade.gov/south-korea>
- Ministry of Education: <http://english.moe.go.kr/main.do?s=english>
- Fulbright (Korean-American Educational Commission): <https://www.fulbright.or.kr>
- KOSA (Korea Overseas Studying Agencies): <https://www.kosaworld.org>

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# TAIWAN

**Capital:** Taipei  
**Population:** 23.5 million (2023 est.)  
**GDP (Purchasing Power Parity):** \$1.143 trillion (2019 est., in 2010 dollars)  
**Currency:** New Taiwan dollars (TWD)  
**Language:** Mandarin Chinese (official)

## CIA World Factbook:

24.04% of the Taiwanese population is under 25 years of age.

## OVERVIEW

	2019	2020	2021	2022
Taiwan Students in the U.S.	23,369	23,724	19,673	20,487
Taiwan Students' Contribution to U.S. Economy	\$874M	\$991M	\$875M	\$906M

Sources: IIE Open Doors 2022 Report; NAFSA Economic Analysis for 2020-2021 Academic Year

According to the Institute of International Education's 2022 Open Doors Report 20,487 students from Taiwan studied in the United States during the 2021/2022 academic year, a 4.14% increase over the previous academic year. These students contributed \$706 million to the U.S. economy. Taiwan is the sixth leading source of students going to the United States. Of the Taiwanese students studying in the United States in the 2021/2022 academic year, 43.9% were graduate students, 29.0% were undergraduates, 3.0% were non-degree students, and 23.0% undertook OPT (Optional Practical Training). The most popular fields of study for Taiwanese students were STEM (52.7%), business and management (17.1%), fine or applied arts (7.7%), and social science (6.0%).

## Taiwan's Bilingual 2030 Plan

Taiwan adopted a policy to become a bilingual English-Mandarin market by 2030, with a particular focus on K-12 students and its civil service. While English is the dominant foreign language in Taiwan (taught from elementary schools and onwards), oral proficiency needs improvement, relative to reading and writing.

Foreign teachers are scarce in Taiwan's public school system due to local regulation. Consequently, Taiwan seeks to leverage online and education technology solutions to increase its number of bilingual teachers. Simultaneously, the government is increasing budget to the public sector, schools, and libraries to improve the public's English proficiency. To achieve the Bilingual 2030 plan, the government allocated a total of US\$361 million for the period 2021 to 2024. By budget allocation, the top areas of focus are the K-12 sector (US\$234.26 million) and the higher education sector (US\$90.1 million).

## U.S. remains the top destination for Taiwan students

According to statistics from the Taiwan Ministry of Education, a total of 60,307 Taiwan students went abroad to study or work in 2021. The United States remained the top study destination for Taiwan students, with 19,673 students, accounting for 33% of Taiwan students going abroad. Australia came in second place, with 15,582 students, and Japan third place, with 7,174 Taiwan students in 2021. Canada, the United Kingdom, Germany, Korea, and New Zealand were also popular among Taiwan students.

Most Taiwan students choose to go to the United States to attend degree, certificate, or language programs. In contrast, most Australia-bound students take part in working holiday programs. Canada and Japan offer similar visas to allow Taiwan citizens to work and study in short-term programs.

North America (mainly United States)	23,673
Oceania (mainly Australia)	16,219
Asia (mainly Japan)	9,722
Europe (mainly United Kingdom)	10,693
Total	60,307

Source: Taiwan Ministry of Education

Traditionally, English-speaking countries have dominated foreign education recruiting in Taiwan. However, in recent years, neighboring Asian countries such as Hong Kong, China, and Singapore have stepped up recruitment efforts for Taiwan students, especially high school students. Aside from foreign recruitment efforts, other factors contributing to this increase include parents' dissatisfaction with inadequate prospects available to Taiwan youth, mainly regarding higher education, job opportunities, and compensation and benefits packages. Despite many incentives offered by China and other Asian countries, the United States remains the top choice for Taiwan parents. This is further supported by the growing number of bilingual international schools operating in Taiwan that prepare students to study in the United States and at other foreign universities. Since many of these students remain in the United States to continue their studies at the graduate level, graduate institutions may also expect growing demand in the future as a result of ongoing growth in the high school and undergraduate education markets

Opportunities are also abundant for accreditation services for secondary education in Taiwan as more and more local bilingual schools are interested in being recognized as internationally accredited institutions.

For many Taiwan students, studying abroad at U.S. institutions remains an appealing alternative to studying in Taiwan. Although Taiwan schools are far more affordable than those in the United States, studying in the United States (or in other overseas locations) provides better employment opportunities after graduation. As a result, U.S. schools that emphasize post-graduation job placement are popular with Taiwan students. Finally, it is recommended that U.S. schools promote their institutions to Taiwan students by hiring student recruitment agencies, developing active alumni networks, and reaching out to potential students through education fairs and social media.

## SUB-SECTORS

- High schools and boarding schools
- U.S.-Taiwan dual-diploma programs in secondary education
- Accreditation & certification services for secondary education in Taiwan
- Joint-degree programs with local universities
- Programs containing a work or internship component
- Programs in business, engineering, computer sciences, health care, education, and fine arts
- Pathway or bridge programs

## OPPORTUNITIES

Partnering with local schools is an effective long-term strategy for U.S. schools to recruit Taiwan students for joint-degree programs or short-term summer programs. As many Taiwan universities have established Mandarin centers to educate foreign students, U.S. schools should consider increasing cultural and language exchanges with Taiwan schools. Commercial Service Taiwan can help match U.S. schools with local universities or high schools.

Partnering with student recruiting agents also 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 study abroad activities. Commercial Service Taiwan can help U.S. schools pre-screen prospective agents and arrange one-on-one meetings in Taipei, Hsinchu, Taoyuan, Taichung, Tainan, and Kaohsiung.

Participation in education fairs may also be an effective tool to recruit Taiwan students. 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 prospective students.

### Education Technology

Taiwan's Ministry of Education (MOE) announced a \$672 million Digital Learning Improvement Project for 2022 to 2025. Although acquisition of tablets for remote learning will account for most of the budget, \$188 million will be allocated for digital content and software for G1-12. This presents opportunities for U.S. EdTech solution providers whose digital content pairs well with tablets. The Digital Learning Improvement Project supports Taiwan's 2030 bilingual policy goal, which focuses on ensuring Taiwan's K-12 students and its civil service become English-Mandarin bilingual by 2030.

To implement the Digital Learning Improvement Project, in April 2022 Taiwan's MOE issued a tender or request for proposal (RFP) for EdTech solutions. The RFP included a \$47 million budget for K-12 schools' procurement of education instruction software each year until 2025. RFPs specify technology products eligible for schools to purchase using MOE funding. Going forward, the MOE will release a new RFP every six months. U.S. EdTech solution providers can work with Taiwanese distributors to be listed on the MOE-approved purchasing list.

## EVENTS

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:

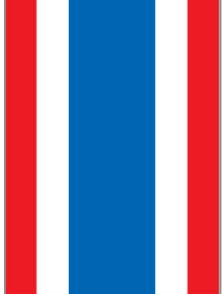
- Oh! Study International Education Expo: <https://ohstudy.net/expo/>
- The Association of Boarding Schools (TABS) Fair (global events): <https://www.boardingschools.com>
- The MBA Tour (global events): <https://www.mba.com/connect-with-schools/gmac-tours>
- Intake Education for latest activities: <https://web.intake.education/tw/events/>

## RESOURCES

- U.S. Commercial Service – Taiwan: <https://www.trade.gov/taiwan>
- Taiwan's Bilingual 2030 Policy: <https://www.trade.gov/market-intelligence/taiwans-bilingual-2030-plan>
- Taiwan's Education EdTech: <https://www.trade.gov/market-intelligence/taiwan-education-edtech>
- Foundation for International Cooperation in Higher Education of Taiwan (FICHET): <http://www.fichet.org.tw/>
- Taiwan Ministry of Education (MOE): <http://english.moe.gov.tw/>
- 2022 Taiwan EdTech Top 50: <https://www.metaedu.org/tw/2022taiwanedtechtotop50result/>

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# THAILAND

<b>Capital:</b>	Bangkok
<b>Population:</b>	69.7 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$1.223 trillion (2021 est.)
<b>Currency:</b>	Thai Baht
<b>Language:</b>	Thai (official)

## UNESCO Student Mobility Number:

Thailand has 32,066 students studying abroad according to UNESCO.

## CIA World Factbook:

29.47% of Thailand's population is under 25 years old.

## OVERVIEW

While Thailand's education system has seen improvement in terms of digital infrastructure and teaching methodologies during the pandemic, there is room for improvement in areas such as reducing the learning gap between students at elite and underprivileged schools, raising English proficiency of students and teachers, enhancing educator's teaching skills, and creating high-quality educational materials consistently.

Thailand has public, private, and international schools. Government schools are free and compulsory for nine years. Preschool is optional, although many Thai children attend kindergarten. Compulsory education begins at the primary level for six years (Prathom 1-6), then moves to lower secondary school for three years (Matthayom 1-3). After this, students can go to an upper secondary school (Matthayom 4-6).

As for university, most bachelor's programs take 4 years to complete. Some programs take 5 years to complete (e.g., architecture, art, graphic art, and pharmacy). Medicine, dentistry, and veterinary medicine programs take 6 years of study.

Looking forward, the Thai market presents opportunities for international student exchanges, four-week summer programs, secondary education, and higher education, including undergraduate and postgraduate study. However, for Thai parents to feel confident in sending their children abroad, it is strongly recommended that U.S. organizations find a local partner that can offer parents a sense of security and safety.

## SUB-SECTORS

### Higher Education

According to the 2021-2022 Open Doors report, prepared by the Institute of International Education (IIE), in 2022, the total number of Thai students increased by 47 students to 5,007 students, compared to 4,960 students the previous year. By academic level, Thai students studying in the U.S. were comprised of 2,267 undergraduates, 1,772 post-graduates, 784

Optional Practical Training (OPT) students, and 184 short-term, non-degree program students (one-year exchange students and English as a Second Language (ESL) students).

Many Thai students prefer to enroll in universities that offer ESL and intensive English language programs to improve their English proficiency. It is common for students looking to enter undergraduate and graduate programs to choose a pathway program to ease the transition to a new social environment, learn more about the foreign culture, and immerse themselves in an English language environment with native speakers before enrolling in their intended study program.

Thai students seeking higher education and graduate degrees currently face significant obstacles since their high school grade point average (GPA) and standardized test scores often do not meet U.S. standards, limiting the number of Thai students admitted to universities in the United States. U.S. schools and higher education representatives are recommended to work with partners in Thailand to promote their institutions and increase their accessibility.

Thailand's higher education market is challenging due to the country's rapidly aging population. According to the Economic Research Institute for ASEAN and East Asia, Thailand is one of the fastest-aging countries in the world. The Thai population aged 60 and over is projected to increase from 13 percent in 2010 to 33 percent in 2040. In addition, the World Bank reported that in 2020, Thailand's birth rate dived below 60,000 for the first time and the total fertility rate decreased to 1.51.

As a result, three-quarters of Thai universities face a shortage in student enrollment and are at risk of downsizing or closing over the next decade. In October 2021, the Office of the Private Education Promotion Commission announced that about 70 private schools closed during the past nine months due to financial problems.

As the pandemic eases, numerous Thai students are studying overseas again. Foreign education organizations and the embassies in Thailand are actively promoting opportunities for Thai students to study abroad. These organizations may provide financial aid, a pathway program for international students, scholarship opportunities, and post-study work visas that allow students to remain in the country for two to three years after graduation.

### Community College

Community colleges are still a niche market as students and Thai parents are not very familiar with the concept and still prefer that their children enroll directly in 4-year colleges or universities. Community college representatives should consider marketing and promotion efforts with local study abroad consultants and partner universities to promote an alternative option for studying in the United States.

### Secondary Education

Due to the growing demand for high-quality education and parents' desire to prepare their children for the global market, many Thai parents enroll their children in international high schools with a broader international focus, STEM, robotics programs and even schools that provide third language options like mandarin. It is widely accepted in Thailand that international schools provide students a greater chance to enter a top university with better career



opportunities post-graduation.

International student exchanges and four-week summer programs are popular choices among Thai high school students. The top destinations are the United Kingdom, New Zealand, Australia, Canada, and the United States.

Thai students seeking high school educational exchange programs present a growth opportunity for the U.S. education market. Graduates from these schools are good candidates for further education in the U.S. because they generally have superior language capabilities and have been exposed to an international school environment, which typically offers broad cultural experiences, a variety of programs, and teaching styles that help drive demand for self-development.

### Online Programs

Many international high schools and some private educational institutions were able to shift students and lecturers to online distance learning during the pandemic. However, some educational institutions still faced challenges, including teachers' ability to support digital learning, students' hesitation to commit large amounts of time to online courses, and families' limited resources to support digital connectivity. According to discussions with various study abroad agencies, online degree programs are not popular among Thai students since they prefer in-person study. In addition, online distance learning cannot provide the same student life experience or improve English competency to the same degree as in-person programs.

### OPPORTUNITIES & TRENDS

The United States is always one of the top choices for Thai students to study abroad, among the other native English-speaking countries, including the United Kingdom, Australia, Canada, and New Zealand. However, Thai students are increasingly studying in non-English speaking countries like China, Japan, Germany, South Korea, and Singapore due to short travel distances, affordable tuition fees, and wide selection of programs.

According to Dr. Suphasset Kanakul, President of the Association of the Coordinating and Promotion of Private Education Commission, many high school students, both public and private, take the General Educational Development (GED) exam. About 10% of high school students from private schools take the GED test and the rate is expected to increase steadily, feeding the pool of students eligible to study in the U.S. higher education system.

#### The most popular academic programs are:

- Business Administration
- Creative Arts & Design
- Engineering
- Computer Science & IT
- Health and Medicine
- Tourism and Hospitality
- Law
- Media and Communication

### DIGITAL MARKETING STRATEGIES

Thailand has around 54.50 million Internet users, an increase of 3.4 million (0.2%) between 2021 and 2022. The most used social media platforms in Thailand are Facebook, YouTube, Line, Instagram, Twitter, and TikTok. Thailand has around 50.05 million Facebook users, 45 million Line users, 42.80 million YouTube users, 18.50 million Instagram users, and 11.45 million Twitter users.

Study abroad agencies have been using Line Messenger, Facebook, and YouTube to communicate with students; share upcoming seminars, workshops, study travel, and cultural programs; and communicate with students' parents. Educational organizers use Facebook as a channel to reach potential students and publish upcoming student fairs. Thai students use many technology platforms, including Facebook, YouTube, and Instagram to post activities; Twitter and Line for messaging; and Google and Zoom for meetings. Facebook, YouTube, Instagram, and Twitter are the top four platforms used by Thai students, and Google remains the most common search tool. TikTok and YouTube are popular for streaming and sharing video content among peers.

U.S. education institutions and study consortia may consider providing digital promotional materials and working with study abroad consultants, school counselors, and university faculty to share their information with potential student groups. Topics of interest include scholarship opportunities, academic programs, co-op opportunities, and tuition fees.

### EVENTS

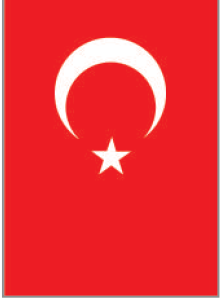
- The OCSC International Education Expo - October 21-22, 2023: <https://www.ocscexpo.org/>
- APAIE 2023 Bangkok | 13-17 March 2023: <https://www.apaieconference.net/>
- Asia-Pacific Association for International Education (Next year's conference will be hosted in Australia)

### RESOURCES

- U.S. Commercial Service - Thailand: <https://www.trade.gov/thailand>
- EducationUSA: <https://educationusa.state.gov/centers/us-embassy-bangkok>
- Fulbright Thailand – United States Education Foundation: <https://www.fulbrightthai.org/>
- Thai International Education Consultants Association (TIECA): <https://tieca.org/>
- Thai Office of Civil Service Commission (OCSC): <https://www.ocsc.go.th/>
- Thai Office of Educational Affairs, DC (OEA): <http://oeadc.org/en/contact>

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# TÜRKIYE

<b>Capital:</b>	Ankara
<b>Population:</b>	83.5 million (2023)
<b>GDP (Purchasing Power Parity):</b>	\$2.668 trillion (2021 est., in 2017 dollars)
<b>Currency:</b>	Turkish liras (TRY)
<b>Language:</b>	Turkish (official)

## UNESCO Student Mobility Number:

Türkiye has 51,146 students studying abroad, according to UNESCO.

## CIA World Factbook:

39.08% of the population in Turkey is under 25 years old.

## OVERVIEW

Türkiye's population of 84.7 million is relatively young. Around 27 percent of the population is under the age of eighteen. This young population provides considerable opportunities for international education institutions.

As of December 2022, there are 129 public and 75 foundation (private) universities serving 8.29 million students in various academic programs. 2021 figures reveal that 3.37 million students are enrolled in undergraduate and vocational programs, 358,271 in graduate programs, 109,540 in doctorate programs, and 4.45 million in the Open University (distance education in various subfields). Public universities charge a small fee, whereas private university tuition costs range from \$1,500 to \$12,000 per year. Outstanding students of limited means often attend private universities on merit scholarships.

Entrance into universities is competitive due to the limited capacity of high-quality university programs. Students need to successfully pass a nationwide placement test administered over a two-day period in June of each year. Every year, an increasing number of students take the university exam. In 2022, 3,008,287 high school graduates took the exams, and 850,631 applicants were enrolled in a 4-year university or a 2-year vocational school program. 154,859 students registered for Open University programs. The remaining test takers were unable to enter a higher education program of their choice. In Türkiye, the Ministry of National Education is responsible for administering K-12 education. The Council of Higher Education (Yükseköğretim Kurulu - YÖK) is a 22-member corporate-public body responsible for the planning, coordination, and supervision of higher education.

Capacity (for graduate and doctorate programs) and quality constraints of Turkish higher education institutions spur demand of Turkish students to study abroad. Many students wishing to study abroad place U.S. universities at the top of the list due to the perceived quality of education and potential career prospects. Over 51,000 Turkish students go abroad for university education. U.S. colleges and universities already attract around a fifth of these students for undergraduate and graduate programs, as well as specialized trainings.

## SUB-SECTORS

### Higher Education

The Institute of International Education's Open Doors 2022 Statistics show that Türkiye, with its 8,467 students, is the eighteenth leading place of origin for foreign students in the U.S. Among European countries, Türkiye holds the third place for the number of students in the U.S., after the U.K. and Germany. The enrollment levels of Turkish students are as follows:

Undergraduate: 2,866  
 Graduate: 3,937  
 Other (Non-degree programs): 247  
 Optional Practical Training: 1,417

About half (46%) of Turkish students in U.S. universities are pursuing graduate degrees.

According to the Turkish Fulbright Commission, which is part of the U.S. Department of State's EducationUSA network, the 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 parents to send their children to reputable boarding schools. Through marketing efforts, Turkish student representation at U.S. boarding schools has increased in recent years. In 2019, over 400 Turkish students pursued their studies at U.S. boarding schools, making the U.S. the second most popular destination for boarding schools after the U.K.

Many Turks find the academic quality, residential campus environment, and superior extra-curricular activities at U.S. boarding schools invaluable. It is also important for potential students and their families that graduated students are accepted at some of the most prestigious and competitive universities in the U.S. and around the world.

## OPPORTUNITIES

There are not enough places in popular Turkish universities and university programs to accommodate the student demand. Thus, opportunities exist for American universities and colleges to explore recruitment possibilities from Türkiye. The results of the central university placement exam in Türkiye are announced in mid-July. 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" chosen from a specific list provided to them. Cost is not a critical factor in students decision-making process as the scholarship sponsors pay for their entire program and the scholarship holders are usually obliged to work with their sponsoring organizations for about four to eight years after graduation.

Due to the competitive nature of the Turkish labor market and high unemployment, many students are compelled to pursue post-graduate education to increase their employment prospects. These programs are even more competitive in Türkiye, so students seek placement at international universities. Graduate studies are the most popular level of enrollment for Turkish students studying abroad; almost 50% of the Turkish students in the U.S. are pursuing graduate degrees.

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

## DIGITAL MARKETING STRATEGIES

Türkiye ranks in the top ten countries for the use of social media platforms including Facebook, Instagram, Twitter, and TikTok.

Marketing on popular social media platforms, active using of streaming platforms such as YouTube and Vimeo, working with influencers/alumni, providing information in Turkish, compatibility of materials with mobile devices are recommended strategies for student recruitment from Türkiye.

## EVENTS

- Study Expo Study Abroad Fairs - October 7 and October 8, 2023  
<https://www.studyexpo.com/exhibitors>
- EURIE- Eurasia Higher Education Summit  
<https://www.eurieeducationsummit.com/>
- IEFT Study Abroad Fairs  
<https://www.ieft.net>
- A2 Study Abroad Fairs  
<http://www.a2fairs.com/>

## RESOURCES

- U.S. Commercial Service – Türkiye: <https://www.trade.gov/turkey>
- Turkish Ministry of National Education: <http://meb.gov.tr>
- Higher Education Council of Türkiye: <http://www.yok.gov.tr/>

- EducationUSA Türkiye: <https://educationusa.state.gov/search/node/Turkey>
- The Turkish Fulbright Commission: <https://fulbright.org.tr/>
- Turkish-American Association: <https://www.taa-ankara.org.tr/en>
- Institute of International Education: <http://www.iie.org>

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# UNITED ARAB EMIRATES

<b>Capital:</b>	Abu Dhabi
<b>Population:</b>	9.97 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$653.067 billion (2021 est., in 2017 dollars)
<b>Currency:</b>	Emirati dirhams (AED)
<b>Language:</b>	Arabic (official)

## UNESCO Student Mobility Number:

The United Arab Emirates has 14,689 students studying abroad according to UNESCO.

## CIA World Factbook:

22.39% of the population in the UAE is under 25 years old.

## OVERVIEW

The UAE is a very competitive education market within the Gulf Cooperation Council (GCC) region. It has a large presence of established public and private institutions.

Education remains a top government priority to create a diversified, knowledge-based economy and reduce the dependency on oil. Education represents 15.5% of the country's \$17.1 billion federal budget for 2023. The UAE has also devised a "National Strategy for Higher Education 2030" that seeks to equip future generations of students with technical and practical skills to strengthen the labor market. It also aims to strengthen accreditation standards, set a framework of qualifications, and further develop the curricula to match international standards.

The education system in the United Arab Emirates is divided into public schools, private schools, and higher education. Private institutions are generally not under direct government control but are nevertheless bound by guidelines set forth by the federal ministry and local authorities.

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 Abu Dhabi's public schools while also acting 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, and building and site requirements.

In September 2017, ADEC was renamed the Department of Education and Knowledge (ADEK) and made a government department according to a decree issued by President Sheikh Khalifa. Under this new mandate, ADEK is responsible for regulating private schools and higher education in Abu Dhabi. In 2018, the Ministry of Education (MoE) and ADEK announced a

plan for the standardization of the UAE's education systems to support a unified and highly performing education sector across the UAE.

The K-12 education sector is strongly dominated by private schools. Private schools in the UAE offer around 17 different curricula, with a predominance of UK, U.S., and Indian models. ADEK has also introduced 'Charter schools' as a third model of the schools education system, besides the existing public and private schools models. Charter schools offer American-based curriculum to public school students who are based in the emirate of Abu Dhabi. It is a strategic partnership between the public and the private sector.

## Knowledge and Human Development (KHDA) in Dubai

Established in 2006, KHDA is responsible for inspecting all private schools in Dubai to ensure proper quality of education, from early learning to higher and continuing education. Along with the Dubai Education Council (DEC), it is responsible for the overall governance and development of the education sector.

Dubai is home to education free zone the **Dubai International Academic City (DIAC)** for tertiary education. DIAC includes 28 international universities. Moreover, the Dubai government has established the **Dubai Knowledge Village**, a free zone for educational institutions in the region.

Due to the transient nature of the expatriate population in the UAE, parents prefer to enroll their children in international private schools.

In higher education, two U.S. institutions have full campuses in the UAE: the Rochester Institute of Technology Dubai and New York University Abu Dhabi.

## SUB-SECTORS AND OPPORTUNITIES

### Higher Education

During the academic year 2021-2022, the UAE had 1,618 students in the United States in undergraduate, graduate, non-degree, and optional practical training (OPT) programs, according to the 2022 Open Doors Report, a decrease of 6.9% from the previous year.

### Undergraduate and Graduate Education

1,288 Emirati students enrolled in undergraduate education in the United States during the 2021-2022 academic year, representing a decrease of 7.9% from the previous year, 248 enrolled in graduate-level studies, representing a 6.4 increase, 34 students enrolled in non-degree studies, representing a 48.5% decrease from the previous year and 48 students enrolled in OPT, representing an increase of 23.1% from the previous year. There is continued demand for study in the United States in graduate, undergraduate, and non-degree studies. However, there is strong competition from the United Kingdom, where a large number of students travel for study.

There is also a demand to open higher education institutions in the UAE. In October 2020, the U.S.-UAE launched a bilateral Strategic Dialogue, including education as one of the strategic sectors to advance institutional capacity and economic diversification.

Opportunities in the higher education sector include institutional partnerships between U.S. and UAE universities, support for college preparation programs, and faculty exchange and short-term student exchange to promote a culture of curiosity, innovation, and academic achievement across the UAE's education system.

### Community College

In September 2022, the Abu Dhabi Department of Education and Knowledge (ADEK) launched the Khotwa (RizeUp) fully funded scholarship program (USD 517,000), which creates opportunities for Emirati students to study for two years at community colleges in the United States and Canada, before transferring their credit to any international or local university to complete their bachelor's degrees, when necessary, requirements are met. This program offers 6,000 Emirati students from 2022 to 2028 overseas experiences to study specialties that meet the demands of national high-priority sectors and equip students with future-ready skills to contribute to the growth of the knowledge economy.

Community colleges looking to recruit students based in the UAE should focus on the unique experiences and values offered to students. They should highlight programs and partnerships with highly ranked universities and skills training programs.

### Secondary Education

U.S. support is needed to train staff, UAE high-school counselors, and English teachers. The U.S. government is working with the UAE Ministry of Education to leverage U.S. expertise for the professional development of English teachers and counselors.

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 the UAE's drive to become a test bed for innovation by introducing schools with modern, digital approaches to education.

### Online Programs

The UAE Ministry of Education does not award scholarships to Emirati students enrolled in online programs. Opportunities exist for two-way virtual exchange programs between U.S. and UAE universities. As an example, American University of Ras Al Khaimah (AURAK) signed an agreement with Wayne State University (WSU) in October 2020.

In October 2018, the UAE launched Madrasa, a free eLearning platform that provides 5,000 free Arabized videos in general science, math, biology, chemistry, and physics. It also provides 11 million words of educational content to students from kindergarten to grade 12. Source: Madrasa (the eLearning platform) - The Official Portal of the UAE Government.

### Research & Development

Joint collaboration in research and development presents opportunities for U.S. and UAE universities. The UAE Ministry of Education is interested in the following research focus

areas: climate change, water and desalination, food security, and health sciences.

### Professional Training Services

Opportunities exist for programs in executive education, training opportunities, or leadership development. However, many large companies build their programs in-house.

### Education Technology

Opportunities exist to expand ties between the U.S. and the UAE through connections with top U.S. education technology companies.

### DIGITAL MARKETING STRATEGIES

According to International Education Specialists' (IDP) UAE office, the digital marketing strategies used by students are the following:

For most educational webinars and online sessions, UAE-based students use Microsoft Teams and Zoom, as well as WebEx in rare cases. These platforms are not only used by in-country schools, but also by competitor countries to reach students in the UAE.

Additionally, Instagram, TikTok, Snapchat, YouTube (for streaming videos), and Facebook are the most popular social media sites for UAE students, although Facebook is less popular among the younger generation. The most popular information search site for UAE students is Google. Therefore, it is important to make sure content on educational opportunities is up-to-date and your institution's search engine optimization (SEO) strategy is strong. Some of the popular online platforms for UAE students seeking job opportunities are: Gulf Talent, Monster, Bayt.com, and LinkedIn. However, not all students have a LinkedIn account. Students and parents are generally kept informed via email marketing, online, and through counselors and local schools. These events allow students the opportunity to meet the universities directly or through virtual channels.

### EVENTS

- International Consultants for Education and Fairs (ICEF) Dubai  
February 12-14, 2024  
<https://www.icef.com/events/icef-dubai-2024/>
- Global Education and Training Exhibition (GETEX)  
Dubai International Convention and Exhibition Center, Dubai, UAE  
April 26-28, 2023  
<https://mygetex.com/>
- Education Investment MENA (EdEx MENA)  
Dubai, UAE  
October 4-5, 2023  
<https://informaconnect.com/education-investment-mena/>
- Najah Expo Dubai  
Dubai World Trade Center (DWTC), Dubai, UAE  
October 8-10, 2023  
Website: <https://informaconnect.com/najahexpo/>

- Najah Abu Dhabi  
Abu Dhabi National Exhibition Centre (ADNEC), Abu Dhabi, UAE  
October 29-31, 2023  
Website: <https://informaconnect.com/najahexpo/>
- Global Education Supplies and Solutions (GESS)  
Dubai World Trade Centre (DWTC), Zabeel Halls 4, 5, 6, Dubai, UAE  
October 30 – November 1, 2023  
Website: <https://www.gessdubai.com/>

## RESOURCES

- The Abu Dhabi Department of Education and Knowledge (ADEK): <https://www.adek.gov.ae/>
- ADEK Charter Schools: <https://charterschools.ae>
- Dubai International Academic City (DIAC): <https://diacedu.ae/>
- EducationUSA Abu Dhabi: <https://educationusa.state.gov/centers/us-embassy-abu-dhabi>
- EducationUSA Dubai: <https://educationusa.state.gov/centers/us-consulate-general-dubai>
- Federal Budget: <https://u.ae/en/information-and-services/finance-and-investment/federal-finance/federal-budget#:~:text=The%20UAE%20Cabinet%20approved%20the,58.3%20billion%20have%20been%20allocated.&text=A%20large%20share%20of%20the,Read%20news%20coverage%20on%20WAM>
- International Education Specialists: <https://www.idp.com/uae/>
- Knowledge and Human Development Authority (KHDA): <https://web.khda.gov.ae/en/>
- Madrasa (the eLearning platform)- The Official Portal of the UAE Government: <https://u.ae/en/information-and-services/education/elearning-mlearning-and-distant-learning/madrasa>
- Ministry of Education – Higher Education Affairs: <https://www.moe.gov.ae/Ar/Pages/home.aspx>
- Ministry of Education – Strategy: <https://www.moe.gov.ae/En/AboutTheMinistry/Pages/MinistryStrategy.aspx>
- U.S. Commercial Service - UAE: <https://www.trade.gov/united-arab-emirates>

## PRESS

- “AURAK signs a cooperation agreement with Wayne State University”: <https://aurak.ac.ae/en/aurak-news-oct-7-2020/>
- “ADEK launches AED 1.9 billion scholarship program”: [The Gulf Time Newspaper: https://gulftime.ae/adek-launches-aed-1-9billion-khotwa-scholarship-programme/](https://gulftime.ae/adek-launches-aed-1-9billion-khotwa-scholarship-programme/)

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# UNITED KINGDOM

<b>Capital:</b>	London
<b>Population:</b>	68.1 million (2023 est.)
<b>GDP (Purchasing Power Parity):</b>	\$3.028 trillion (2021 est., in 2017 dollars)
<b>Currency:</b>	British Pounds (GBP)
<b>Language:</b>	English

## UNESCO Student Mobility Number

The United Kingdom has 40,074 students studying abroad according to UNESCO.

## CIA World Factbook

In the United Kingdom, 29.12% of the population is under the age of 25.

## OVERVIEW

According to the Institute of International Education’s 2022 Open Doors Report, the United Kingdom was 14th among senders of students to the United States. 10,292 international students from the UK studied at U.S. higher education institutions during the academic year 2021-2022. This represents a 28.2% increase from the 2020-2021 academic year number of 8,028. The total number of international students studying in the U.S. increased by 15%.

UK students contributed an estimated \$500 million to the U.S. economy, an increase of just over 25% from the previous year.

## SUB-SECTORS

### Higher Education

The United Kingdom’s education 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), 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 2022, 47% of UK students studying in the U.S. are doing so at the undergraduate level. This represents a 13.2% increase from last year (4,865 undergraduate students in 2021-2022 vs. 4,299 in 2020-2021).

### Graduate Education

Graduate students make up 27.0% of UK students studying within the United States. Last year,

2,301 students made up the graduate population and in 2021-2022, there has been a 21.6% increase for a new total of 2,799 students studying at the graduate level.

### Non-degree Education and Optional Practical Training (OPT)

Non-degree education enjoyed the greatest increase in UK students of any category. From 2020-2021 to 2021-2022, non-degree students jumped from 184 to 1,405, an increase of 663.6%. There are 1,223 UK students who are OPT students. Non-degree students currently represent 13.6% of UK students in the U.S.

### OPPORTUNITIES

As a result of widespread teleworking and online learning throughout 2020 and 2021, the UK market has become more accustomed to education and training delivered in a digital format. In the past, online or distance learning programs looking to expand into the UK were met with limited success. However, the adoption rates for online and distance learning have increased and this presents an opportunity for U.S. providers in these areas.

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 "Events" section below).

Changes to UK government policy have made U.S. universities more competitive in this market. Rising university fees and active encouragement of outward mobility are both present opportunities for recruiting British students. Tuition fees were introduced in England in 1998 and have risen steadily. The current tuition fee of £9,250 (\$11,100 using a rate of 1.2 GBP per 1 USD) in England was set in 2017 and has been frozen pending a university funding review. Fees in England are the same for all students, whereas other areas of the UK give their domestic students a reduction in fees. For example, Welsh students in Wales pay £9,000 (\$10,800) as opposed to £9,250 (\$11,100). Domestic students in Northern Ireland pay £4,395 (\$5,274), and in Scotland, domestic students do not pay university fees. Following the end of the Brexit transition period on January 1, 2021, students from the European Union (EU), the European Economic Area (EEA), and Switzerland now pay international tuition rates.

In addition to university studies, UK students are increasingly taking advantage of other options available to them, including apprenticeships, graduate schemes, trainee schemes, or directly entering the workforce. UK students are a discerning consumer group with a variety of choices and opportunities readily available.

### EVENTS

- Student World: <https://thestudentworld.com/>
- What Career/What University Live - What Next: November 10-11, 2023: <https://www.whatcareerlive.co.uk/events/london/>
- USA College Days - September 23-24, 2023: <https://fulbright.org.uk/news-and-events/2023/usa-college-day-2023/>
- For updated Fulbright events: <https://www.fulbright.org.uk/events>

### RESOURCES

- U.S. Commercial Service - United Kingdom: <https://www.trade.gov/united-kingdom>
- U.S.-UK Fulbright Commission: <https://www.fulbright.org.uk>

### U.S. COMMERCIAL SERVICE CONTACT

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# URUGUAY

**Capital:** Montevideo  
**Population:** 3.4 million (2023 est.)  
**GDP (Purchasing Power Parity):** \$78.12 billion (2021 est., in 2017 dollars)  
**Currency:** Uruguayan peso (UYU)  
**Language:** Spanish

## UNESCO Student Mobility Number

Uruguay has 6,183 students studying abroad according to UNESCO.

## CIA World Factbook

34.65% of the Uruguayan population is under 25 years old.

## OVERVIEW

The United States and Uruguay have a long history of building ties through educational and cultural exchanges. While many of the Uruguayan visitors to the United States travel for tourism or business, 414 Uruguayan students are currently attending U.S. higher education institutions, according to the 2022 Open Doors Report.

Uruguay had an increase of 4.8% of Uruguayan students going to the United States over the last year due to the ease of the pandemic. Uruguay went from 453 students in the pre-pandemic, to 395 students at U.S. higher education institutions in 2020/2021, and now 414 students. We are witnessing a recovery but are not yet at pre-pandemic levels.

The breakdown is as following: 159 undergraduate students; 179 graduate students; 25 non-degree students (language, short-term non-degree programs, etc.); and 51 OPT students (Optional Practical Training).

In 2022 Uruguay's non-degree students grew 1,150%. Undergraduate students remained the same, graduate students grew 7.8%, and OPT experienced a -25% decrease.

Many Uruguayans have dual citizenship in European countries, which they take advantage of to be able to study abroad at more competitive prices and to be able to attend courses in Spanish, for those going to Spain.

The latest available figures show a great majority of Uruguayan students choosing neighboring countries such as Argentina and Brazil to study; however, the United States is the first English-speaking country of choice, followed by the United Kingdom, Australia, and Canada.

Uruguayan Students in English-Speaking Countries	UNITED STATES	UNITED KINGDOM	AUSTRALIA	CANADA
	414	87	65	30

According to the English Proficiency Index released by Education First, Uruguay is considered a "Moderate proficiency" country in terms of English ability. Uruguay ranks 8th in English Proficiency in Latin America. From 2012 to 2017, Uruguay was considered a "Low proficiency" country, which highlights Uruguay's improvements in the area.

The government of Uruguay incorporated English instruction and related supporting technology into the public schools' curriculum at all levels. As of August 2021, 91% of urban schools in the 4th, 5th and 6th grades of Primary Education offered English classes. 65% of students learn English through videoconferencing technologies.

Students have access to a variety of fields of study: over 40% of students choose Social Sciences or the Arts (Business and Economy, Law, International Relations, Education), over 30% choose fields in the Healthcare sector (Psychology, Medicine, Veterinary), and around 20% choose fields in Technology (Engineering, Computer Science, Architecture and Design).

## SUB-SECTORS

### Undergraduate Education

Although Uruguayan public universities are free for residents, 159 students enrolled in undergraduate programs in the United States during the 2021/22 academic year. The number remained the same as in 2020/2021 academic year.

### Graduate Education

Graduate programs are popular as students can find specializations not offered in Uruguay. During the 2021/22 academic year, the number of students increased by 7.8% due to the easing of pandemic restrictions. 179 graduate students were enrolled in graduate programs in the United States.

### Non-Degree

25 students from Uruguay were enrolled in non-degree programs in the United States during the 2021/2022 academic year marking an astonishing 1,150% increase from the 2020/21 amount of 2 students.

### OPT - (Optional Practical Training)

During 2021/22, 51 Uruguayan students enrolled in OPT programs in the United States representing 25% decrease from the previous year.

### Online Programs

Uruguay is experiencing increased interest in virtual or distance learning programs for executive education and certifications.

### Research and Development

As research opportunities in Uruguay are limited to a few fields of study, many students look



to U.S. universities to work on their PhDs or complete postdoctoral studies.

## OPPORTUNITIES

Exchange programs and partnerships with higher education institutions are a common method for market entry. Private universities are interested in expanding their exchange program offerings with U.S. universities. Uruguayan universities are also interested in establishing partnerships with U.S. higher education institutions to teach Spanish and Latin American studies courses to U.S. students studying in Uruguay.

There is a limited number of master's degrees and PhD programs in Uruguay, so students look for opportunities abroad.

Undergraduate education in Uruguayan public universities (UDELAR and UTEC) is tuition-free so long-term study abroad programs are often not the first option for Uruguayan students due to the higher costs associated with these programs. However, short-term programs could be of interest to complement the Uruguayan public university offerings.

There is growing interest in online executive courses and programs among the business community.

Uruguay is a strong contributor to the Fulbright academic programs, with masters and PhD scholarships in biotechnology, health, energy, agroindustry and food chain development, natural resources, and information and communication technologies.

Popular fields of study for Uruguayan students are engineering, law, and business.

There are opportunities for intensive English program providers, including targeted English programs on selected topics such as finance, law, and accounting at both the undergraduate and graduate levels.

## CHALLENGES

Increased competition from competitors, especially in the European countries. Many Uruguayans have dual citizenship, and as EU citizens, they can access European universities which offer lower tuition rates.

High tuition costs in U.S. universities discourage students from choosing U.S. higher education institutions.

Currency exchange rates make it expensive for Uruguayan students to study abroad, especially since they can study for free at undergraduate level at UDELAR or UTEC.

## DIGITAL MARKETING STRATEGIES

Digital marketing is a very effective tool for penetrating the Uruguayan market. According to World Bank 2021 data, Internet penetration in Uruguay is 76.95%. The most popular platforms used by Uruguayan students are Zoom, Google Meet, and Microsoft Teams. Their popularity increased exponentially due to the pandemic. The most popular social media used

by Uruguayan students are WhatsApp, Facebook, Instagram, LinkedIn, Twitter, TikTok and YouTube. The most popular streaming platforms in Uruguay are YouTube, Netflix, Instagram, TikTok and Twitch.

Uruguayan students mostly research information through the internet. They also take online courses from the INEFOP-Coursera partnership offered during the pandemic. LinkedIn is one of the sites most used by Uruguayan students to search for job opportunities, together with university platforms and university bulletin boards. Websites such as CompuTrabajo, BuscoJobs and SmartTalent are also common ways of applying for jobs.

Parents and students receive information about educational opportunities mainly through advertisements in social media, emails, and ad websites. Schools' outreach to students is done via Google ads, Instagram ads, Facebook ads, email, and LinkedIn ads. Moreover, while some private schools and universities have counselors, many parents and students listen to recommendations from family and friends.

American institutions could use an education recruitment agent. Although not widely extended, there is at least one in the market. Hiring a marketing agency that specializes in the industry of education could also be useful to prepare a recruitment strategy specifically catered for the Uruguayan market. Additionally, hiring influencers who can talk about these matters and promote U.S. education could also be an interesting way of reaching the Uruguayan digital society.

## EVENTS

### EducationUSA Fair

Education fairs are one of the most efficient means to recruit individual Uruguayan students, including the EducationUSA fair, supported by the U.S. Department of State's Bureau of Educational and Cultural Affairs (ECA). The fair takes place during on the second semester of the year. Universities interested in participating and exhibiting at the fair should contact the EducationUSA office in Uruguay.

Since 2013, an average of 2,000 students looking for undergraduate, graduate, and intensive English programs register every year for the EducationUSA Fair which is co-organized by the U.S. Embassy in Montevideo and the binational center Alianza Cultural Uruguay - Estados Unidos. This annual, 4-hour fair gathers over 1,000 students from all over the country. In 2020 and 2021 the fair was virtual due to the Covid-19 pandemic. The Uruguay Ministry of Education is very supportive of this program and participating university representatives highlight the quality of the Uruguayan students and their English levels.

The EducationUSA advising center in Uruguay organizes general information sessions, workshops, group and individual advising sessions, clubs, webinars and other activities to support students who want to pursue university studies in the United States. For more information visit: [educationusa.org.uy](https://educationusa.org.uy)

## RESOURCES

- U.S. Commercial Service - Uruguay: <https://www.trade.gov/uruguay>

- EducationUSA Office in Uruguay: <http://www.educationusa.org.uy>
- Fulbright Commission: <https://fulbright.org.uy/>
- Smart Talent: <https://www.smarttalent.uy/uruguay>
- Live in Uruguay: <https://www.liveinuruguay.uy/universities>

### U.S. COMMERCIAL SERVICE CONTACT

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## VIETNAM

<b>Capital:</b>	Hanoi
<b>Population:</b>	104.79 million (2023 est.)
<b>GDP (Purchasing Power Parity)</b>	\$1.036 trillion (2021 est., in 2017 dollars)
<b>Currency:</b>	Dong (VND)
<b>Language:</b>	Vietnamese (official)

### UNESCO Student Mobility Number

Vietnam has 132,559 students studying abroad according to UNESCO.

### CIA World Factbook

37.83% of Vietnam's population is under 25 years old.

### OVERVIEW

Education and training are top priorities for the government, which needs to equip the labor force with scientific, technological, and management skills. As new industries expand, a university degree is increasingly essential for young Vietnamese workers searching for higher-paying jobs in new and emerging sectors, with a focus on the high-tech industry.

In addition, the domestic education market in Vietnam continues to strengthen due to the significant increase in per capita income, the robust expansion of both the manufacturing and services sectors, and the emphasis Vietnamese families traditionally place on ensuring a solid education for their children. As a result, domestic offerings continue to improve. Still, a large percentage of university graduates need further training to find jobs in their perspective fields, demonstrating a need for more practical and effective education. As a result of this acknowledgment, many Vietnamese families and students look for educational opportunities outside of Vietnam.

According to the Vietnamese Ministry of Education and Training (MoET) data, there were approximately 190,000 Vietnamese students studying abroad in the 2019-2020 academic year, with a vast majority of students abroad focused on post-secondary school opportunities. These numbers continue to grow as families increase their household income and look to send their children abroad to ensure they have access to the best educational opportunities. The overseas study destinations include Japan (22%), the United States (17%), Australia (17%), Canada (12%), The UK (7%), China (6%), and others (19%).

### SUB-SECTORS

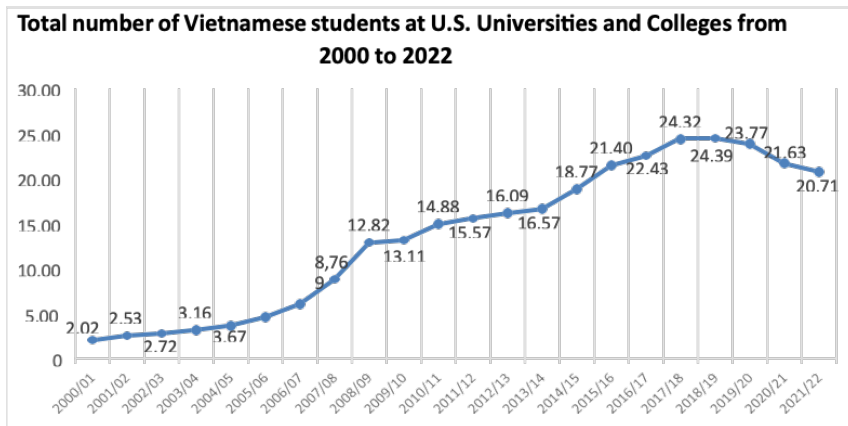
#### Higher Education

The latest Open Doors report of the American Institute of International Education (IIE) released on November 14, 2022, said that the United States has more than 948,000 international students from more than 200 countries and territories studying at the U.S. institutions of higher education in the academic year 2021-2022. This is an increase of about 4% from the previous school year.

According to the report, the number of Vietnamese students studying in the U.S. in 2021- 2022 is 20,713, accounting for 2.2% of the total number of international students studying in the U.S. and contributing 721 million USD for US economy.

Of the 20,713 Vietnamese students enrolled in higher education in the United States, 67.3% were undergraduates, 17.3% focused on the graduate study level, 13.1% enrolled in Optional Practical Training (OPT), and the remaining 2.07% percent were pursuing non-degree programs.

Vietnam is currently ranked 5th by IIE for the first time in terms of the number of international students at higher education level in the U.S., despite the number of Vietnamese students coming to the U.S. has decreased for the last three years (AY2019-2020: 23,777; AY2020- 2021: 21,631; AY2021-2022: 20,713) due to pandemic travel restrictions. Before the global pandemic, the number of Vietnamese students in the U.S. increased consecutively every year.



Vietnamese students in the U.S. by field of study		
	2020-2021	2021-2022
TOTAL STUDENTS	21,631	20,713
STEM*	46%	47.1%
Business/ Management	26.9%	25.6%
Math/ Computer Science*	17.8%	19.3%
Education	1%	1.1%
Engineering*	12.4%	11.7%
Physical/ Life Sciences*	10.4%	10.7%
Health Professions*	5.4%	5.4%
Social Sciences	4.9%	5.7%
Fine/ Applied Arts	4.4%	4%
Humanities	1.2%	1.5%

Intensive English	1.4%	0.7%
Other	11.6%	11.3%
Undeclared	2.6%	3.1%

\* Science, Technology, Engineering, and Math (STEM) field Note: Percent distribution may not total 100.00 due to rounding.

Among community college enrollees, Vietnamese students continue to constitute the second largest group of foreign students, accounting for approximately 10% of all international enrollments in 2021-2022, according to the Institute of International Education's (IIE) annual "Open Doors" Report.

### Secondary Education

There were more than 49,000 international student records for K-12 education during 2021. Approximately 8.4 percent of K-12 students in 2021 pursued primary school education, while roughly 92.7 percent of K-12 students pursued secondary school education (grades 9-12). China sent 37 percent of all K-12 students in 2021, followed by South Korea, Mexico, Vietnam, and Canada.

Below are the top five countries of citizenship with the most significant number of international K12 students in the United States in the calendar year 2021.

- China: 37% (17,375)
- South Korea: 8.7% (4,288)
- Mexico: 7% (3,462)
- Vietnam: 6.7% (3,323)
- Canada: 4.3% (2,129)

### Vietnamese students in US for K-12 education

School year	Number of Vietnamese students
2019	5,862
2020	4,450
2021	3,323

(Source: SEVIS of the U.S. Department of Homeland Security)

### Online Program

Vietnam's online learning development is favorable due to (1) the enhancement of the Vietnamese government in IT application and digital transformation in education and training, (2) the development of internet infrastructure, and (3) the increase of Smartphones and other mobile digital devices users. However, many severe barriers lower the potential for online learning programs.

Time zone differences can affect a student's experience in the virtual classroom. For instance, while lectures in certain parts of U.S. happen early in the morning, it is usually late at night in

Vietnam's e-learning market holds a challenge due to users' stereotypes. Online education degrees are referred to as "distance learning", which is usually considered an inferior, informal alternative for learners with poor academic achievement or financing conditions. Moreover, the online program is less recognized by employers in Vietnam.

Although the pandemic has brought about huge opportunities for online learning, school administration, teachers, students, and parents hesitate to engage in online education delivery. They feared the new method would affect the learning outcomes as the students sometimes lack self-motivation when studying independently. Online learners can be distracted and lose focus easily when home studying.

## Education Technology

For investors, the Asian EdTech market is one of the potential investment markets with strong growth. The development of Distance Learning and EdTech in Southeast Asia has driven fast growth in Vietnam.

According to a recent report by Do Ventures, EdTech is the third most invested field in Vietnam in the past eight years in the technology sector. The total venture capital investment in Vietnam for EdTech is \$103 million, just behind the payment field (\$462 million) and retail (\$416 million). However, the area of EdTech and the digital transformation of education in Vietnam is still at its early stages.

In 2019, Vietnam was in the top 10 fastest-growing online education markets globally, with an annual growth rate of 44.3%. Currently, there are more than 200 EdTech businesses in Vietnam, with 2 million users nationally. The market size is estimated at no less than US\$2 billion.

Vietnam has favorable conditions for the development of EdTech, such as a young population, a fast-growing economy, strong government support, increasing educational expenses, good internet coverage, and a high percentage of smartphone users.

## OPPORTUNITIES

The United States is Vietnamese students' and parents' first choice when planning to study abroad. Vietnamese students are interested in learning about majors, the school/campus environment, scholarships, academic requirements, and internship and job opportunities when evaluating schools. Meanwhile, parents are interested in a school location, campus safety, total cost (including school cost and living cost), connections with universities and colleges, and the focus on employment skills. However, the difference between the South and North of Vietnam are prevalent. In the southern regions, location and financial aid/scholarship packages are key drivers for families. In contrast, in the north of Vietnam, families pay more attention to the ranking of the schools and key performance statistics such as test scores and the number of graduates that move on to 2 and 4-year colleges and universities.

## Four-year University/Graduate Degree

Most Vietnamese students are interested in four-year undergraduate programs at U.S. universities, though many also extend their studies in the U.S. at the graduate level. Science, Technology, Engineering, and Math (STEM) remain the top selected fields of study by Vietnamese students, followed by Business & Management and Physical/Life Science.

## High Schools/Boarding Schools

There is growing interest among Vietnamese families in sending their children to the U.S. to enroll in high school/boarding schools. This is due to the belief of families that their children will better adapt to life at a U.S. university or college if they also attended 2-3 years of high school in the U.S. This will allow them to better adapt culturally, academically, and socially, ensuring a better chance of success as they pursue a higher education degree.

It is important to note that Vietnamese parents cite their desire for providing a safe and comfortable environment for their kids as a primary criterion for selecting boarding schools. Other factors that go into the family's decision-making are financial aid/scholarship packages and the relationships a school has with community colleges and universities, allowing their student to transition to a U.S. institution smoothly and seamlessly.

## Joint-Degree Programs

Partnering with local institutions for 2+2, 3+1, or 3+1+X joint-degree programs.

The Vietnamese government's top three priorities include improving infrastructure, institutional reform, and human resources development. As part of this, improving domestic education is a top priority in various plans. The initiatives include ambitious goals, such as a ten percent annual increase in domestic university enrollment and developing a higher education system that is more in line with global standards. Because of this, the Vietnamese government has increased budget allocations, liberalized private sector involvement, and encouraged foreign participation in developing education and training services.

As the Vietnamese government gives greater autonomy for institutions to manage all aspects of their schools, institutions in Vietnam are increasingly interested in expanding partnership opportunities with foreign institutions, especially American institutions.

## DIGITAL MARKETING STRATEGIES

Among Facebook, YouTube, Instagram, and Tik Tok, which are the most popular social media sites for Vietnamese students, Vietnamese parents are highly engaged on Facebook. These users aged 18 – 35, account for 75% of the Facebook users in the country. It is also a popular platform for streaming videos.

Regarding search engines, Google takes the top position among Vietnamese users. Standing second is a local alternative: Coc Coc ([www.cococ.com](http://www.cococ.com)). These search engines will lead users to educational opportunities, such as the official institutions' websites. Thus, investing and updating your website is an effective way to promote the institutions.

LinkedIn is the most popular platform that students use to search for job opportunities. Users receive job advertisements and get alerts on free training programs.

Although the above popular social media and search engines help you reach a large Vietnamese population, focusing on the target customers will be more effective. Thus, schools should consider partnering with local education agents to promote the schools on their websites. Those who visit the local education agents' websites are mostly interested in studying overseas and

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## EVENTS

There are several education fairs in Vietnam annually, including events organized by EducationUSA. The EducationUSA fairs are some of the largest and most well-attended events of their kind in Vietnam. For more information, please visit: <https://educationusa.state.gov>.

## RESOURCES

Information about studying in the United States is available through Education USA, a global network of more than 400 advisory centers supported by the Bureau of Educational and Cultural Affairs at the U.S. Department of State: <https://educationusa.state.gov>

- Higher Engineering Education Alliances: <https://heep.org>
- Viet Abroad: <https://vietabroad.org/>
- Fulbright Vietnam: <https://fulbright.edu.vn>

## U.S. COMMERCIAL SERVICE CONTACTS

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## 2022 MARKET SIZES

Country	# of Students Abroad in the U.S.	% of Undergraduate Enrollment	% of Graduate Enrollment	% of Other: ESL*/OPT*/HE*
Algeria	268	32.46%	44.78%	22.76%
Argentina	2,718	44.81%	36.31%	18.87%
Australia	3,892	55.37%	28.67%	15.96%
Austria	977	37.05%	31.93%	31.01%
Belgium	988	39.17%	31.78%	29.05%
Belize	388	53.87%	28.87%	17.27%
Brazil	14,897	49.31%	31.90%	18.80%
Bulgaria	532	50.75%	26.69%	22.56%
China	290,086	37.74%	42.46%	19.79%
Colombia	8,077	35.00%	43.51%	21.49%
Costa Rica	1,315	46.46%	33.99%	19.54%
Croatia	392	51.79%	36.22%	11.99%
Denmark	1,091	42.25%	17.32%	40.42%
Dominican Republic	1,300	61.08%	22.92%	16.00%
Egypt	3,967	33.20%	48.37%	18.43%
El Salvador	1,445	71.07%	16.54%	12.39%
Ethiopia	2,680	63.62%	22.72%	13.66%
Finland	480	61.04%	22.29%	16.67%
France	7,751	31.88%	29.52%	38.60%
Germany	8,550	33.20%	29.98%	36.82%
Ghana	4,916	21.93%	60.70%	17.37%
Greece	2,407	31.62%	46.57%	21.81%
Guatemala	1,228	58.47%	24.10%	17.43%
Honduras	2,186	60.52%	22.92%	16.56%
Hong Kong	5,848	56.31%	26.03%	17.66%
Hungary	705	49.36%	31.63%	19.01%
India	199,182	13.83%	51.22%	34.95%
Indonesia	8,003	56.32%	22.88%	20.80%
Japan	13,449	52.11%	24.46%	23.43%
Jordan	2,426	34.42%	47.44%	18.14%
Kazakhstan	2,121	44.74%	34.23%	21.03%
Kenya	3,799	51.43%	31.64%	16.93%
Kuwait	5,923	68.16%	16.14%	15.70%
Lebanon	1,958	25.79%	51.38%	22.83%
Malaysia	4,933	54.13%	20.86%	25.02%
Mexico	14,500	53.37%	30.43%	16.21%
Morocco	1,466	43.04%	30.83%	26.13%
Netherlands	2,172	48.02%	26.06%	25.92%
New Zealand	1,539	57.89%	25.93%	16.18%
Nicaragua	553	59.31%	24.59%	16.09%
Nigeria	14,438	31.37%	49.95%	18.68%

Country	# of Students Abroad in the U.S.	% of Undergraduate Enrollment	% of Graduate Enrollment	% of Other: ESL*/OPT*/HE*
Norway	1,633	59.83%	16.66%	23.52%
Pakistan	8,772	36.95%	41.44%	21.61%
Panama	1,910	67.75%	15.65%	16.60%
Peru	4,335	44.08%	31.83%	24.08%
Philippines	3,278	47.13%	37.71%	15.16%
Poland	1,458	46.98%	32.72%	20.30%
Portugal	1,030	46.31%	30.19%	23.50%
Qatar	500	78.80%	15.80%	5.40%
Singapore	3,901	42.30%	37.07%	20.64%
South Africa	2,375	58.69%	27.37%	13.94%
South Korea	40,755	44.81%	36.60%	18.59%
Sweden	2,352	64.03%	11.82%	24.15%
Taiwan	20,487	29.74%	43.97%	26.29%
Thailand	5,007	45.28%	35.39%	19.33%
Türkiye	8,467	33.85%	46.50%	19.65%
Ukraine	1,835	50.08%	30.30%	19.62%
United Arab Emirates	1,618	79.60%	15.33%	5.07%
United Kingdom	10,292	47.27%	27.20%	25.53%
Uruguay	414	38.41%	43.24%	18.36%
Vietnam	20,713	67.33%	17.36%	15.30%

## 2023/24 BEST PROSPECTS BY COUNTRY

Country	High School	Boarding Schools	Community College	Undergraduate	Graduate	Law School	OPT	ESL	Online Degree	Summer/Certificate Programs
Algeria				X	X			X		
Argentina					X		X	X	X	
Australia				X	X		X			X
Austria	X	X	X	X	X			X	X	X
Belgium	X			X	X			X	X	X
Belize				X	X		X		X	
Brazil	X	X	X	X			X	X		X
Bulgaria				X	X	X			X	X
China	X	X		X	X		X			X
Colombia			X	X	X		X	X	X	X
Costa Rica			X	X	X		X			
Croatia				X	X	X			X	X
Denmark				X	X					
Dominican Republic			X	X	X		X	X		X
Egypt				X	X					
El Salvador			X	X	X		X	X		
Ethiopia			X	X	X					
Finland				X	X					
France			X	X	X		X			
Germany	X	X	X	X			X			
Ghana			X	X	X				X	X
Greece				X	X				X	X
Guatemala			X	X	X					
Honduras			X	X	X			X	X	X
Hong Kong	X	X	X	X			X		X	X
Hungary				X	X		X	X	X	X
India			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
Indonesia			X	X	X		X			
Japan		X	X	X			X	X		X
Jordan			X	X	X	X		X	X	
Kazakhstan	X	X	X	X	X		X	X	X	X
Kenya		X	X	X	X				X	
Kuwait				X						
Malaysia	X		X	X	X		X		X	X
Mexico	X	X	X	X	X		X			X
Netherlands				X	X					X
New Zealand	X			X			X		X	
Nigeria				X	X		X		X	X
Norway	X			X	X					
Pakistan			X	X	X					X
Panama			X	X	X			X	X	
Peru					X			X	X	
Philippines				X	X		X		X	X
Poland	X			X				X		X
Portugal		X	X	X	X		X	X	X	X
Qatar				X	X					
Singapore			X	X	X		X		X	X
South Korea			X	X	X		X		X	
Sweden			X	X	X					
Taiwan		X		X	X		X			
Thailand	X	X	X	X	X	X	X	X		X
Türkiye	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
Ukraine	X	X				X	X		X	X
United Arab Emirates			X	X	X			X		X
United Kingdom			X	X	X	X			X	X



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## 2023/24 BEST STUDENT RECRUITMENT METHODS

Country	Education Agents	Institutional	Student Outreach	Online Outreach
Argentina		X	X	
Australia		X		X
Austria		X	X	X
Belgium		X	X	X
Belize		X	X	
Brazil	X		X	X
Bulgaria	X		X	X
China	X	X	X	
Colombia	X	X	X	X
Costa Rica		X	X	
Croatia	X		X	X
Denmark	X	X		X
Dominican Republic		X	X	X
Egypt	X			X
El Salvador		X	X	
Ethiopia	X		X	X
Finland	X	X	X	X
France	X	X		
Germany	X	X	X	X
Ghana	X			X
Greece		X	X	X
Guatemala		X	X	
Honduras		X	X	
Hong Kong	X	X	X	
Hungary	X	X	X	
India	X	X	X	X
Indonesia	X	X	X	X
Japan	X	X	X	
Jordan	X		X	X
Kazakhstan	X	X	X	X
Kenya	X	X	X	X
Kuwait	X		X	
Malaysia	X	X		X
Mexico	X	X	X	X

Country	Education Agents	Institutional	Student Outreach	Online Outreach
Netherlands		X	X	X
New Zealand		X	X	X
Nigeria	X		X	X
Norway	X	X	X	X
Pakistan	X	X	X	
Panama	X	X	X	X
Peru		X	X	X
Philippines	X	X	X	X
Poland	X	X	X	
Portugal	X	X	X	X
Qatar	X	X	X	X
Singapore		X	X	
South Korea	X		X	X
Sweden	X	X	X	X
Taiwan	X	X	X	
Thailand	X	X	X	X
Türkiye	X			X
Ukraine	X		X	X
United Arab Emirates	X	X	X	X
United Kingdom		X	X	X
Uruguay		X	X	X
Vietnam	X		X	





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## SCHOLARSHIP INFORMATION BY COUNTRY

Country	Granting Entities	Website(s)
Australia	The Ramsay Centre	<a href="https://www.ramsaycentre.org/scholarships-courses/">https://www.ramsaycentre.org/scholarships-courses/</a>
Austria	Austrian Agency for International Cooperation in Education and Research	<a href="https://oead.at/en/">https://oead.at/en/</a>
Brazil	Capes	<a href="https://www.gov.br/capes/pt-br">https://www.gov.br/capes/pt-br</a>
Colombia	Colombian Institute for Educational Loans and Technical Studies Abroad (ICETEX) COLFUTURO	<a href="https://www.icetex.gov.co">https://www.icetex.gov.co</a> <a href="http://www.colfuturo.org">http://www.colfuturo.org</a>
Costa Rica	Fundacion CRUSA	<a href="https://crusa.cr/en/capital-humano-conocimiento-e-innovacion-becastecnicos/">https://crusa.cr/en/capital-humano-conocimiento-e-innovacion-becastecnicos/</a>
Dominican Republic	Ministry of Higher Education (MESCYT)	<a href="https://mescyt.gob.do/becas/internacionales/">https://mescyt.gob.do/becas/internacionales/</a>
El Salvador	Scholarship Program FANTEL (Ministry of Education)	<a href="https://becasfintel.gob.sv/">https://becasfintel.gob.sv/</a>
Finland	SAM Scholarship Foundation Finlandia Foundation National	<a href="http://www.samsuomi.fi">www.samsuomi.fi</a> <a href="https://finlandiafoundation.org/">https://finlandiafoundation.org/</a>
France	French Ministry of Higher Education	<a href="https://www.education.gouv.fr/bo/21/Hebdo26/ESRS2117943C.htm">https://www.education.gouv.fr/bo/21/Hebdo26/ESRS2117943C.htm</a>
Germany	German Academic Scholarship Foundation EPRO 360  German Academic Exchange Service (DAAD)  Federation of German-American Clubs e.V. (VDAC)  German Parliament and U.S. Congress  Deutscher Fachverband Highschool e.V.  Experiment e.V.  Open Door International e.V.  Partnership International e.V.	<a href="https://www.studienstiftung.de/mccloy-programm/">https://www.studienstiftung.de/mccloy-programm/</a> and <a href="https://www.studienstiftung.de/erp/">https://www.studienstiftung.de/erp/</a> <a href="https://www.epro360.de">https://www.epro360.de</a>  <a href="https://www.daad.de/de/infos-services-fuer-hochschulen/weiterfuehrende-infos-zu-daad-foerderprogrammen/promos/">https://www.daad.de/de/infos-services-fuer-hochschulen/weiterfuehrende-infos-zu-daad-foerderprogrammen/promos/</a>  <a href="http://www.vdac.de/en/student-exchange.html">http://www.vdac.de/en/student-exchange.html</a>  <a href="https://www.bundestag.de/ppp">https://www.bundestag.de/ppp</a>  <a href="https://dfh.org/foerderung/stipendien-einzelner-dfh-mitglieder/">https://dfh.org/foerderung/stipendien-einzelner-dfh-mitglieder/</a>  <a href="https://www.experiment-ev.de/for-foreign-visitors">https://www.experiment-ev.de/for-foreign-visitors</a>  <a href="https://www.opendoorinternational.de/ueber-odi/foreign-visitors">https://www.opendoorinternational.de/ueber-odi/foreign-visitors</a>  <a href="https://www.partnership.de/stipendien/">https://www.partnership.de/stipendien/</a>

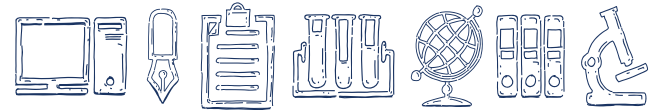
Country	Granting Entities	Website(s)
	KulturLife gGmbH	<a href="https://kultur-life.de/stipendien/nordlicht-stipendium-fuer-schueleraustausch/">https://kultur-life.de/stipendien/nordlicht-stipendium-fuer-schueleraustausch/</a>
	Kreuzberger Kinderstiftung ASSIST American Institute for Foreign Study Group (AIFS) Youth for Understanding (YFU) Government scholarships (state and city levels)	<a href="https://www.kreuzberger-kinderstiftung.de/about-us/">https://www.kreuzberger-kinderstiftung.de/about-us/</a> <a href="https://www.assistscholars.org/de/index">https://www.assistscholars.org/de/index</a> <a href="https://www.aifs.de/service/english.html">https://www.aifs.de/service/english.html</a> <a href="https://www.yfu.de/welcome-to-germany">https://www.yfu.de/welcome-to-germany</a> <a href="https://schulaemter.hessen.de/schulbesuch/internationaler-austausch/schueleraustausch">https://schulaemter.hessen.de/schulbesuch/internationaler-austausch/schueleraustausch</a>
<b>Greece</b>	Private institutions	Various
<b>Guatemala</b>	Guatefuturo - which is a non-profit foundation supported by the government of Guatemala and also by private Guatemalan companies	<a href="https://guatefuturo.org/">https://guatefuturo.org/</a>
<b>Honduras</b>	Presidential Scholarship Honduras 2020	<a href="https://becashonduras2020.gob.hn/">https://becashonduras2020.gob.hn/</a>
<b>Hungary</b>	Hungarian-American Enterprise Scholarship Fund (HAESF) The Rosztochy Foundation Hungarian American Coalition (HAC) Josephine De Kármán Fellowship Trust International Student Exchange Program (ISEP) EasyGo to USA	<a href="http://www.haesf.org">www.haesf.org</a> <a href="http://www.rosztochyfoundation.com">www.rosztochyfoundation.com</a> <a href="https://hacusa.eu/programs/">https://hacusa.eu/programs/</a> <a href="http://www.dekarman.org">www.dekarman.org</a> <a href="http://www.isep.org">www.isep.org</a> <a href="http://www.easygotousa.org">www.easygotousa.org</a>
<b>Indonesia</b>	Ministry of Finance through LPDP (The Education Fund Management Institution)	<a href="https://lpdp.kemenkeu.go.id/en/">https://lpdp.kemenkeu.go.id/en/</a>
<b>Jordan</b>	Ministry of Higher Education in cooperation with donor countries and foreign embassies	<a href="http://rce.mohe.gov.jo/RecognizedUniversities">http://rce.mohe.gov.jo/RecognizedUniversities</a>
<b>Kazakhstan</b>	Bolashak Government Scholarship Program	<a href="https://bolashak.kz/en">https://bolashak.kz/en</a>
<b>Kenya</b>	Safaricom Equity Group and Mastercard Foundation (MCF) Zawadi Africa Akili Dada	<a href="https://www.safaricom.co.ke/">https://www.safaricom.co.ke/</a> <a href="https://equitygroupfoundation.com/wings-to-fly">https://equitygroupfoundation.com/wings-to-fly</a> <a href="https://www.zawadiafrica.org/">https://www.zawadiafrica.org/</a> <a href="https://www.akilidada.org">https://www.akilidada.org</a>

Country	Granting Entities	Website(s)
	KenSAP	<a href="https://www.kensap.org">https://www.kensap.org</a>
<b>Kuwait</b>	Ministry of Higher Education	<a href="https://www.mohe.edu.kw/">https://www.mohe.edu.kw/</a>
<b>Malaysia</b>	Various companies and government agencies, including Khazanah Nasional, Petronas, and Bank Negara Public Service Department (PSD) Malaysia	<a href="https://www.moe.gov.my/en/">https://www.moe.gov.my/en/</a>
<b>Netherlands</b>	The Education Executive Agency (DUO), a Dutch government agency that is part of the Ministry of Education, Culture and Science	<a href="https://www.duo.nl/particulier/international-visitor/">https://www.duo.nl/particulier/international-visitor/</a>
<b>Panama</b>	Panama Bilingue Instituto para la Formacion y Aproximacion de Recursos Humanos (IFARHU) Secretaria Nacional de Ciencia y Tecnologia (SENACYT)	<a href="https://ifarhu.gob.pa/">https://ifarhu.gob.pa/</a> <a href="https://www.senacyt.gob.pa/">https://www.senacyt.gob.pa/</a>
<b>Portugal</b>	Luso American Foundation	<a href="https://www.flad.pt/en/education/">https://www.flad.pt/en/education/</a>
<b>Qatar</b>	Government of Qatar	<a href="https://www.edu.gov.qa/en/Pages/higheredudefault.aspx?ItemID=60">https://www.edu.gov.qa/en/Pages/higheredudefault.aspx?ItemID=60</a> and <a href="https://www.edu.gov.qa/en/Deputy/HEaffairs/Pages/UnischolarshipOut.aspx">https://www.edu.gov.qa/en/Deputy/HEaffairs/Pages/UnischolarshipOut.aspx</a>
<b>Singapore</b>	Singapore government, agencies, and companies	Various
<b>South Africa</b>	South African Department of Agriculture, National Arts Council, and some private organizations	
<b>South Korea</b>	National Institute for International Education (NIEED) Korea Foundation for Advanced Studies Korean-American Scholarship Foundation Sejong Scholarship Foundation of America Korea Student Aid Foundation	<a href="http://www.nieed.go.kr/user/nd70479.do">http://www.nieed.go.kr/user/nd70479.do</a> <a href="https://eng.kfas.or.kr/theme/kfaschanel/intl_scholarship_5.php">https://eng.kfas.or.kr/theme/kfaschanel/intl_scholarship_5.php</a> <a href="https://www.kasf.org/">https://www.kasf.org/</a> <a href="https://www.ssfa.org/home/apply">https://www.ssfa.org/home/apply</a> <a href="https://www.kosaf.go.kr/eng/jsp/main.jsp">https://www.kosaf.go.kr/eng/jsp/main.jsp</a>
<b>Thailand</b>	Thai Office of Civil Service Commission (OCSC)	<a href="http://www.ocsc.go.th">www.ocsc.go.th</a>
<b>Türkiye</b>	Ministry of National Education on behalf of all Turkish government agencies	<a href="https://yyegm.meb.gov.tr/">https://yyegm.meb.gov.tr/</a> (Turkish)
<b>United Arab Emirates</b>	UAE Ministry of Education	<a href="https://www.moe.gov.ae/en/eservices/servicecard/scholarships/pages/subjects.aspx">https://www.moe.gov.ae/en/eservices/servicecard/scholarships/pages/subjects.aspx</a>
<b>Vietnam</b>	Ministry of Education and Training (MOET)	

## POPULAR RESOURCES FOR U.S. INTERNATIONAL EDUCATION

- U.S. Commercial Service Global Education Team: <https://www.trade.gov/education-industry>
- Industry and Analysis, Office of Supply Chain, Professional & Business Services: <http://www.trade.gov/professional-and-business-services>
- Institute of International Education: <https://opendoorsdata.org/data/international-students/all-places-of-origin/>
- EducationUSA: <https://educationusa.state.gov/>
- State Department Visa Website: <https://travel.state.gov/content/visas/en.html>
- OECD: <http://www.oecd.org/>
- IMD: <http://www.imd.org>
- UIS UNESCO: <http://uis.unesco.org/>
- SEVIS 2020 Data Mapping Tool Data: <https://studyinthestates.dhs.gov/sevis-data-mapping-tool>
- WorldOMeter: <https://www.worldometers.info/>

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