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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 exports ranked 8th among service exports in 2021. During the 2020/2021 academic year the U.S. hosted over 900,000 international students and reported $31.8 billion in education exports, which supported over 306,308 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. Pre-pandemic, the Organization for Economic Co-operation and Development (OECD) report estimates that 8 million students will be studying abroad 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 2022 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 62 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 and Industry & Analysis education sector specialists worldwide. For additional information or education market research, please visit https://www.trade.gov/education-industry.

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 educational institution or Intensive English Program increase its international student enrollment, please visit 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.

- **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.
MARKET BRIEFS
ALGERIA

Capital: Algiers
Population: 43.6 million (July 2021 est.)
GDP (Purchasing Power Parity): $468.4 billion (2020 est., in 2017 dollars)
Currency: Algerian Dinar (DZD)
Language: Arabic, French, Berber or Tamazight.

UNESCO Student Mobility Number:
Algeria has 31,288 students studying abroad according to UNESCO.

CIA World Factbook:
43.51% of the Algerian population is under 25 years of age.

OVERVIEW

Algeria has a large untapped international student market. The combination of a relatively uncompetitive education system and a saturated domestic job market creates opportunities for international universities, as well as language study programs. According to the UNESCO Institute for Statistics, Algeria sent 25,700 students abroad in 2018. This number pales in comparison to its popular neighbor, Morocco, which sent 51,100 students abroad during the same year. Currently, Algeria’s international student numbers more closely resemble Tunisia, its neighbor to the East, who has just a quarter of Algeria’s respective population but sends a roughly comparable 22,400 students abroad.

Despite having fewer international students than Morocco, Algeria is currently undergoing a political transformation that may lead to a dramatic expansion of international student numbers in the coming years. With higher per capita income levels, its Western neighbor Algeria has the potential to match or even exceed Morocco to become the second largest contributor of international students in North Africa. According to the World Bank, Algerians earn significantly higher wages than their Moroccan counterparts do with net national income per capita in 2010 constant dollars at $3,611 in 2017, compared to $2,952 in 2018 for Morocco—a difference of 22 percent. With an untapped student market that boasts the second largest student population in North Africa after Egypt, Algeria’s market potential is large.

Today, the vast majority of Algeria’s international students (78.6%) choose to go to France. Other destinations include Canada, Turkey, and the United Kingdom, which each respectively account for less than 3% of all Algerian study abroad students. The United States takes eleventh place among study abroad destinations according to UNESCO. 219 students from Algeria chose to study abroad in the U.S. in the 2020/21 academic year, according to the IIE Open Doors Report. Low enrollment numbers in the U.S. are likely due to the cost of education in the U.S., considering that the average monthly salary in Algeria was $338 in 2015 and that only about thirty-thousand students received government backed scholarships. It is interesting to note, however, that approximately a third of all government scholarship recipients chose to study outside of Algeria (Algerian Ministry of Higher Education).
Despite low enrollment in the United States, the number of Algerian students studying in the U.S. has increased in recent academic years, according to the IIE Open Doors Report. During the 2017/18 school year, 212 students came to the U.S. to study. This number increased during the 2018/19 and 2019/20 academic years, to 238 and 239 students respectively. The 2020/21 school year saw a decrease in students, as 219 students came from Algeria to study in the U.S.

**SUB-SECTORS**

**Academic Level**

The majority of Algerian students studying in the U.S. are enrolled in undergraduate programs. During the 2020/21 academic year, 46% of Algerian students in the U.S. were in undergraduate programs, compared to 37% in graduate programs. Prospective Algerian students are most interested in master's (32%), bachelor's (23%), doctorate degrees (16%), exchange programs (11%), and intensive English programs (10%). Former study abroad students mostly studied in master's degrees (36%), intensive English programs (15%), doctorate degrees (14%), undergraduate exchange programs (13%), and undergraduate degrees (12%).

Exchange programs across education levels (high school, undergraduate, graduate, post graduate) were remarkably less popular than direct enrollment programs. Exchange programs were sought after by 11% of surveyed prospective students and are only semi-popular (32%) with teenage students from 15-18 years old, seeking to enroll in high school exchanges. With former study abroad students, slightly more enrolled in exchange programs (13.3%).

Intensive English programs were about as popular with prospective Algerian students as exchange programs.

**OPPORTUNITIES**

For prospective students, university discipline and country of study are the two main primary selection criteria for the place of study. When comparing schools, the most important factor for Algerian students is program quality, trailed by diversity, and cost. University ratings, location, and connections with institution staff are much less important.

**RESOURCES**

- U.S. Commercial Service – Algeria: https://www.trade.gov/algeria
- U.S. & Foreign Commercial Service Global Education Team: https://www.trade.gov/education-industry
- Industry and Analysis, Office of Supply Chain, Professional & Business Services: www.trade.gov/professional-and-business-services

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ARGENTINA

Capital: Buenos Aires
Population: 45.9 million (July 2021 est.)
GDP (Purchasing Power Parity): $893.3 billion (2020 est., in 2017 dollars)
Currency: Argentine peso (ARS) ($)
Language: Spanish (Official)

UNESCO Student Mobility Number:
Argentina has 9,283 students studying abroad according to UNESCO.

CIA World Factbook:
39.21% of the population in Argentina 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.

SUB-SECTORS

Undergraduate Education

Although Argentine public universities are free-of-charge, more than 1,020 students were
enrolled in undergraduate programs in the United States during the 2020-2021 academic year. During academic year 2019-2020, there were 1,057 Argentine students pursuing undergraduate degrees in the U.S. This was a 1.3 percent increase from the 2018-2019 academic year.

**Graduate Education**

During the 2019-2020 academic year, the number of students decreased due to local economic downturn. During the 2018-2019 academic year, there was a 1.6 percent increase in the number of Argentine students pursuing graduate-level studies in the U.S. from the previous academic year. For 2020-2021, the number declined further to 803 students.

**Non-Degree**

Only 63 students from Argentina were enrolled in non-degree programs in the United States during the 2020-2021 academic year, a 58.8 percent decrease from the previous academic year. This follows another large decrease in the number of students in 2019-2020, due to the economic downturn in Argentina.

**OPT - (Optional Practical Training)**

During the 2019-2020 academic year, there was a large decrease in the number of OPT students from Argentina in the U.S. due to economic troubles in Argentina and the border closures following the start of the COVID-19 pandemic. In academic year 2020-2021, the number of Argentine OPT students declined another 8.9 percent to 298 students.

**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.
- High inflation and poor currency exchange rates for Argentine currency make it
expensive for Argentinian students to study abroad.
• The Argentine administration placed a 30% tax on all foreign purchases including tourism and education.
• 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
  November 2022
  https://fiesamardelplata.com.ar/
• ExpoUniversidad
  Buenos Aires
  https://www.expouniversidad.com.ar/

RESOURCES

• U.S. Commercial Service – Argentina: https://www.trade.gov/argentina
• U.S. 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
• The Fulbright Program: https://fulbright.edu.ar/
• EducationUSA: https://educationusa.state.gov/
• 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/

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AUSTRALIA

Capital: Canberra
Population: 25.8 million (July 2021 est.)
GDP (Purchasing Power Parity): $1.25 trillion (2020 est., in 2017 dollars)
Currency: Australian Dollars (AUD)
Language: English

UNESCO Student Mobility Number:
Australia has 13,268 students studying abroad according to UNESCO.

CIA World Factbook:
31.61% of the Australian population is under 25 years old.

OVERVIEW

Australia has 43 universities, with more than 1.4 million enrolled students, local and international. 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 which is 17% less students than in September 2020. 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 U.S. in Australia.

Australian students have traditionally pursued studies abroad. The unique mix of professional, academic, athletic, and social opportunities available within U.S. schools has made the United States one of the most attractive destinations for these students. During the 2020-2021 academic year, 3,623 Australians studied in the United States according to the 2021 Open Doors Report. Of these, approximately 2,082 Australian students pursued an undergraduate degree and 972 pursued a graduate degree.

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. The top five receiving states are: California, New York, Massachusetts, Pennsylvania, and Texas.

Australia has many accomplished athletes and many Australian student athletes are interested in obtaining athletic scholarships to universities in the United States. Australia ranks among the top five sending countries of National Collegiate Athletic Association (NCAA)-eligible athletes to the United States. Some of the popular sports are basketball, tennis, soccer, track and field, and swimming.

SUB-SECTORS

Education Technology

The Australian education technology market is dynamic and evolving. This market is expected
to grow to $1.2 billion in 2022 (Frost & Sullivan industry analysis). Since 2017, the most common solutions of EdTech organizations in Australia target the primary, secondary, and higher education sectors. According to Deloitte, this is closely aligned with government spending in these areas.

In its 2020-2021 budget, the Australian government announced significant funding for initiatives to improve the teaching and learning of Science, Technology, Engineering, and Mathematics (STEM) in early learning and schools. Additionally, the government has provided grants to boost girls' and women's participation in STEM and entrepreneurship.

**OPPORTUNITIES**

Australia and the United States have similar education systems, so Australian students can transition to U.S. institutions 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.

**Summer Work Travel Programs**

Australia and New Zealand are currently participating in a pilot program that allows qualified exchange visitors from the respective countries to have the opportunity to gain international cultural exposure and work and travel experience for up to twelve months in the United States, with a U.S. student doing the same in Australia or New Zealand.

**Education Technology and Distance Learning**

The online education industry in Australia has a high potential for globalization as online course delivery removes national boundaries and allows for competition at a global level. The trends towards reskilling, upskilling, and lifelong learning for professional development are also expected to support growth in this flexible method of study. Improvements in technology infrastructure are further anticipated to facilitate the industry's growth (IbisWorld Industry report 2020).

There are significant opportunities in Australia for U.S. EdTech firms. Some of the most appealing EdTech products and services to the Australian market include: STEM in education such as robots and coding, innovative classroom resources, Augmented Reality (AR)/ Virtual Reality (VR), and gamification.

**EVENTS**

The EducationUSA offices in Australia support several education fairs held in Australia throughout the year that can be found on the EducationUSA Australia- Events Facebook Page.

**RESOURCES**

- U.S. Commercial Service- Australia: https://www.trade.gov/australia
- U.S. 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
• Australasian Council on Open, Distance and eLearning (ACODE): https://www.acode.edu.au/
• EducationUSA Australia: https://au.usembassy.gov/education-culture/educationusa-australia/
• Tertiary Education Quality and Standards Agency: https://www.teqsa.gov.au/

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UNESCO Student Mobility Number:
Austria has 22,138 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 has been a decrease of about 41%, which was mainly due to Covid-related travel uncertainties. Despite this, the United States remains one of the top study abroad destinations for Austrian students, ranking 4th place 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.
Austrian Students Studying in the United States (longer than 90 days)

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Education System

Austria’s education system ranks 6th 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 2nd in prioritizing employee training and 3rd in implementing apprenticeships. Austria also reaches higher ranks in quality of education measures, at 11th place for primary school and 7th 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. On December 12,
2021, schools will again open with in-person instruction. 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 currently 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). 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/](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, Uni.at, Studentenjob.at, 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 and Studienwahl.at also provide helpful information on educational opportunities.

**EVENTS**

BeSt3 Student Fair  
Vienna, Austria  
March 3-6, 2022  
[https://bestinfo.at/en/](https://bestinfo.at/en/)
RESOURCES

U.S. Government

• U.S. Commercial Service- Austria: https://www.trade.gov/austria
• U.S. 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
• EducationUSA: https://educationusa.state.gov/
• Fulbright Austria: http://www.fullbright.at/
• U.S. Embassy Visa Information: https://at.usembassy.gov/embassy-vienna-resumes-limited-visa-services/
• State Department Visa Website: https://travel.state.gov/content/visas/en.html

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
• Education platform: https://studyinaustria.at/en/
• Digital University Hub: https://www.digitaluniversityhub.eu/

Other

• OECD: http://www.oecd.org/
• IIE: http://www.iie.org
• IMD: http://www.imd.org
• UIS UNESCO: http://uis.unesco.org/
• Opentender EU: http://www.opentender.eu

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UNESCO Student Mobility Number:
Belgium has 16,628 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 2020/2021 academic year, there were 756 international students coming from Belgium and studying at U.S. higher education institutions,
a -28.3% change compared to the previous year. This has been 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 (representing a +34.6% change from 2020/2021). 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. However, the data does not take into account the fact that many students, if not most, had to leave the U.S. and return to Belgium once the outbreak began around March 2020.

**Undergraduate**

In 2020/2021, 400 out of the 756 Belgian students studying in the U.S. were enrolled in undergraduate courses (53%), a decrease of 17.5% probably caused by the impact of COVID-19.

**Community College**

The Belgian equivalent of an American community college in the Dutch-speaking community would be a “hogeschoolen” (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 Belgian students take into consideration.

**Graduate Education**

In 2020/2021, 209 out of 756 Belgians studying in the United States were enrolled in graduate courses (27.6%), a decrease of 19.3% compared to 2019/2020.

**Professional Training Services**

During the 2020/2021 academic year, 122 out of 756 Belgian students in the United States pursued an Optional Practical Training (16%), which represents a 8.3% decrease compared to 2019/2020, where 133 out of 1,055 students enrolled for that course of studies (13%).

**Non-degree**

In 2020/2021, 25 out of 756 Belgian students in the United States attended non-degree programs such as English language or short-term studies (3%), which represents an 86% decrease compared to 2019/2020, where 178 out of 1,055 students enrolled for that course of studies (17%).
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 2020/2021 was 25 out of 756 (3%).

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 2020 Belgium devoted the highest percentage of its GDP (3.5%) 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.

In order 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

- International Multidisciplinary Conference Recent Research and Ideas (10 December-11 December 2021): https://10times.com/e1z0-7k2h-2hgp
- The PLPR Conference (7 February-11 February): http://plpr-association.org/conferences-events/conferences/

RESOURCES

- U.S. Commercial Service – Belgium: https://www.trade.gov/belgium
- U.S. Commercial Service Global Education Team: https://trade.gov/education-industry
- Industry and Analysis, Office of Supply Chain, Professional & Business Services: https://www.trade.gov/professional-and-business-services
- 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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UNESCO Student Mobility Number:
Brazil has 81,882 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 that Brazil is still going through, it is the largest higher education market in Latin America. Due to the pandemic situation, education expenditures for 2021 were around $14.54 billion. The Brazilian Ministry of Education’s budget for 2021 was projected to be $20 billion.

Brazil has 47.3 million students in its basic education system, with 8.8 million in preschool, 26.7 million in elementary school, and 7.5 million in high school. The higher education sector includes 8.4 million enrolled students and there are 4.7 million students in other modalities, such as adult education. Approximately 75.4 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 the segment for primary education, private institutions dominate higher education in Brazil. Public institutions in Brazil are small and are not capable of meeting the overall demand for higher education courses. Public higher education institutions are directed to serve as centers of excellence and research, with extremely competitive admissions standards and a limited capacity for expansion. Private higher education institutions are focused on meeting the professional requirements of the labor market and have developed flexible programs to meet the needs of the working population.

Industry specialists such as Hoper Education expect that despite the challenging economic/political situation, the education sector in Brazil will continue to grow, particularly the distance-learning segment. The lower monthly tuition fees for distance-learning are expected to increase the participation in higher education in Brazil. Distance-learning solutions are particularly attractive
to the substantial number of private, for-profit universities in Brazil. According to research done by INEP, in Brazil, there are approximately 355 institutions offering distance learning education. In total, they have close to 1.5 million students.

**SUB-SECTORS**

**Higher Education**

Brazil ranks eighth as a country of origin for foreign students studying at U.S. universities. During the 2020-2021 academic year, 14,000 students from Brazil were studying in the United States. The breakdown was as follows: 52 percent undergraduate; 29.7 percent graduate students; 3.7 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 early stages of creating a system to recognize foreign university degrees. Once the system is established, foreign universities will have to register to be included on the certified list. This is intended to be a fast-track system for students to have their foreign diplomas recognized. For continuing education purposes, private universities have the authority to work on case-by-case diploma acceptance.

Despite the bureaucratic challenges of having U.S. degrees recognized in Brazil, the number of Brazilian students choosing U.S. education is significant. Brazilian students in U.S. colleges and universities contributed $758 million to the U.S. economy during the 2020-2021 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, Brasilia, 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 Brasilia 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 Brasilia (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.

**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 16-18, 2022 – São Paulo – The Conference creates an environment for networking between international educators and student recruitment agents.

**FAUBAI Conference** – end of April TBC, 2022 – 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 10–13, 2022 – 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 29 – October 1, 2022 – 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
- U.S. 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
- 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

- Institute of International Education - Open Doors: https://www.iie.org/
- Belta – Brazilian Educational and Language Travel Association: https://www.belta.org.br/
- WENR– World Education News + Reviews: https://wenr.wes.org/

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BULGARIA

Capital: Sofia
Population: 6.9 million (July 2021 est.)
GDP (Purchasing Power Parity): $155.1 billion (2020 est., in 2017 dollars)
Currency: Leva (BGN)
Language: Bulgarian

UNESCO Student Mobility Number:
Bulgaria has 24,794 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 2021 IIE Open Doors Report showed that the number of Bulgarian students in the U.S. decreased by 15.2% over the last academic year, from 690 students during the 2019-2020 academic year to 585 students in the 2020-2021 academic year.

The only U.S. university in the country -- the American University in Bulgaria (AUBG) – is located 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.

**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 are able to sign up for the whole gamut of middle and high school subjects, which vary from English literature, to business, to programming, to psychology and anthropology.

Most Bulgarian students 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 the opportunity to learn a second language (German, Spanish, Russian). The majority 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 knowldege.

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.

**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.

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.

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 the latest one in December 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.

**EVENTS**

World Education Fair
Sofia, Bulgaria
March 26-27, 2022

**RESOURCES**

- U.S. Commercial Service – Bulgaria: [https://www.trade.gov/bulgaria](https://www.trade.gov/bulgaria)
- U.S. & Foreign Commercial Service Global Education Team: [https://www.trade.gov/education-industry](https://www.trade.gov/education-industry)
- Industry and Analysis, Office of Supply Chain, Professional & Business Services: [https://www.trade.gov/professional-and-business-services](https://www.trade.gov/professional-and-business-services)
• OP Science and Education for Smart Growth 2014-2020: http://sf.mon.bg/?go=page&pageId=84
• Horizon 2020: http://horizon2020.mon.bg/en
• American University in Bulgaria: https://www.aubg.edu/
• American College of Sofia: https://www.acs.bg/
• Eurostat: https://ec.europa.eu/eurostat

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U.S. Commercial Service – Sofia, Bulgaria
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Phone: +359 2 939 5784
OVERVIEW

The United States is a leading destination for international students from Guatemala, Honduras, El Salvador, Costa Rica, and Nicaragua. The number of Central Americans enrolled in U.S. higher education institutions reached a total of 6,579 during the 2020-2021 academic year, representing a 7.22% decrease from the previous year due to the worldwide Covid-19 pandemic. 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:

<table>
<thead>
<tr>
<th>Place of Origin</th>
<th>Academic Year 2020/2021</th>
<th>Undergraduate</th>
<th>Graduate</th>
<th>Non-degree</th>
<th>OPT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belize</td>
<td>352</td>
<td>187</td>
<td>120</td>
<td>2</td>
<td>43</td>
</tr>
<tr>
<td>Costa Rica</td>
<td>1,134</td>
<td>523</td>
<td>408</td>
<td>23</td>
<td>180</td>
</tr>
<tr>
<td>El Salvador</td>
<td>1,492</td>
<td>1,092</td>
<td>201</td>
<td>54</td>
<td>145</td>
</tr>
<tr>
<td>Guatemala</td>
<td>1,102</td>
<td>695</td>
<td>257</td>
<td>16</td>
<td>134</td>
</tr>
<tr>
<td>Honduras</td>
<td>2,021</td>
<td>1,294</td>
<td>411</td>
<td>41</td>
<td>275</td>
</tr>
<tr>
<td>Nicaragua</td>
<td>478</td>
<td>304</td>
<td>110</td>
<td>6</td>
<td>58</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>6,579</strong></td>
<td><strong>4,095</strong></td>
<td><strong>1,507</strong></td>
<td><strong>142</strong></td>
<td><strong>835</strong></td>
</tr>
</tbody>
</table>

Source: 2021 Open Doors Report

Number of students studying abroad per UNESCO Student Mobility Statistics:

<table>
<thead>
<tr>
<th>Place of Origin</th>
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<th>Graduate</th>
<th>Non-degree</th>
<th>OPT</th>
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<td><strong>1,507</strong></td>
<td><strong>142</strong></td>
<td><strong>835</strong></td>
</tr>
</tbody>
</table>

Source: 2021 Open Doors Report

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

<table>
<thead>
<tr>
<th>Place of Origin</th>
<th>Undergraduate</th>
<th>Graduate</th>
<th>Non-degree</th>
<th>OPT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belize</td>
<td>51.57%</td>
<td>23%</td>
<td>16%</td>
<td>134</td>
</tr>
<tr>
<td>Costa Rica</td>
<td>37.27%</td>
<td>54%</td>
<td>41%</td>
<td>275</td>
</tr>
<tr>
<td>El Salvador</td>
<td>44.65%</td>
<td>53.44%</td>
<td>51.23%</td>
<td>45.14%</td>
</tr>
<tr>
<td>Guatemala</td>
<td>53.44%</td>
<td>44.65%</td>
<td>51.23%</td>
<td>45.14%</td>
</tr>
<tr>
<td>Honduras</td>
<td>51.23%</td>
<td>53.44%</td>
<td>44.65%</td>
<td>45.14%</td>
</tr>
<tr>
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<td><strong>53.44%</strong></td>
<td><strong>44.65%</strong></td>
<td><strong>45.14%</strong></td>
</tr>
</tbody>
</table>

Source: 2021 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 of better employment in national or multinational corporations. Other countries of destination for students are Spain, Argentina, France, Canada, and Germany.

Central Americans in general are interested in scholarships and financial aid when evaluating universities. Community college degrees are of interest to Central American students 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 #44 in the 2021 EF EPI English Proficiency Index (which evaluates the English language skills of 100 countries worldwide), followed by El Salvador at number 54, Honduras at 55, Guatemala at 61, and Nicaragua at 76.

According to the 2021 Open Doors Report, a total of 353 students from Central America participated in Intensive English Programs (IEPs) in the United States, including 72 from Honduras, followed by Costa Rica (45), El Salvador (43), Guatemala (26), Nicaragua (15), and Belize (3).

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

In the 2020-2021 academic year, El Salvador ranked 19th 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. As of November 2021, schools in the Central American region continue under
a hybrid system. One of the main challenges for the government of each country is lack of Internet access and 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.

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 and social media 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 2020 - 2021.

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

Central America Trade Mission- March 27 - April 1, 2022

The trade mission will start in Guatemala on March 27th. Participants will then have the opportunity to choose up to two countries for in-person one-on-one meetings with local companies/institutions interested in your products or services.

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

RESOURCES

- U.S. and Foreign Commercial Service Global Education Team: https://www.trade.gov/education-industry
- Industry and Analysis, Office of Supply Chain, Professional and Business Services: https://trade.gov/professional-and-business-services
- EducationUSA: https://educationusa.state.gov
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Havivi Rodriguez, Commercial Specialist
U.S. Commercial Service – Tegucigalpa, Honduras
Phone: +504 2236-9320
Email: Havivi.Rodriguez@trade.gov
UNESCO Student Mobility Number

China has 1,061,511 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 education system in the world, with 270 million students and 16 million teachers in over 500,000 schools in 2020 (OECD)¹. 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 in the coming decade, called China’s Education Modernization 2035. This plan sets the objective of establishing a modern education system of lifelong learning with universal quality pre-school education, balanced compulsory education, enhanced vocational education, and more competitive higher education.² Under these guidelines government policies, investment and financing, and consumer demand became the three driving forces for a dynamic education market in China, and the following subsectors emerged that are worth U.S. education sector attention: K-12 education, higher education, vocational education, and education technology (EdTech).

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.³

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 recent 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 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**

Despite the fact that China remains the largest source of international students in the United States for the 2020-2021 school year, with over 300,000 students in undergraduate, graduate, non-degree, and optional practical training (OPT) programs, this figure decreased 15% when compared to the previous school year.

![Chinese Students in the United States](image)

*Source: Open Doors*

**Undergraduate and Graduate Programs**

125,616 Chinese students were enrolled in U.S. undergraduate programs and 118,859 in U.S. master’s and doctoral programs in the 2020-2021 school year. The number of undergraduates decreased 15% from the previous year, and the number of graduate students decreased by 13%.

These changes are reflected in Sunrise International’s research (https://sieconnection.com/research) that shows the United States starting to lose ground to the United Kingdom and Canada as a study destination in the minds of Chinese families. Some of the major factors cited include the COVID-19 response, gun violence, and safety concerns for Asian students. But the same research also shows that the demand for study overseas is resilient. U.S. colleges and universities should continue to prioritize the safety of in-person study and provide institutional support for international students during COVID-19 restrictions to increase their appeal to Chinese students.
Since early 2020, many college fairs and recruitment outreach events have been cancelled or switched to an online format. Although some of the in-person events resumed by the spring of 2021, it remains important for institutions to maintain a virtual presence through social media, webinars, and other marketing channels. Study agencies serving as a bridge for students and schools underwent a tough year in 2020. A study by BOSSA reports that 20% of agencies in China have closed, particularly small and medium-sized companies.7

**Community College Programs**

U.S. community colleges and vocational schools are gaining popularity in China. 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. 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.

**Education Technology**

Across the world, 2020 brought extraordinary changes to many sectors, and education is no exception. Both international students and domestic students have had to adjust their ways of studying by adapting to online learning on various technology platforms.

In the past five years, China has enjoyed rapid growth in the use of education technology (EdTech) and online learning, both in the private and public sectors. The driving forces include favorable government policies, abundant venture capital, increased consumption, fast-growing mobile Internet penetration, and the fact that the Chinese people attach great importance to education. Since 2015, China has been leading the global investment in EdTech. In 2020, China invested a record-high $10 billion in EdTech (https://www.holoniq.com/notes/16.1b-of-global-edtech-venture-capital-in-2020/). From 2010 through the end of Q1 2021, China invested nearly twice the amount of the U.S., six times that of India, and ten times that of Europe, according to Holon IQ (https://www.holoniq.com/edtech/10-charts-that-explain-the-global-education-technology-market/).8

The long-term impact of COVID-19 on education is expected to lead to an increase in spending on digital infrastructure and new digital models utilizing the new tools available in digital education.

Some industry trends and challenges in the EdTech sector include:

- **Online Merge Offline (OMO) Model:** The OMO model of the education industry refers to a business model that reshapes the entire education chain through technological
innovation and organizational change, and then achieves online and offline integration. Through innovation, it broadens the service radius and enhances the effect of education via technology integration. For example, New Oriental has launched the dual teacher model and TAL has launched Xueersi online schools. For institutions, OMO is one of the key means to achieve product differentiation, reduce customer acquisition costs, and deepen the moat; OMO does not specify a precise boundary and scope, each institution explores its own solutions under the OMO model based on its own understanding of technology and education according to iResearch Inc (http://www.iresearchchina.com/).  

- **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. STEAM-related courses are not only in demand for older children and students; rising middle-class incomes and fears of intense future competition for college admissions and jobs are leading parents to pay substantial sums for STEAM-related education for even young children and students.

- The emphasis on **project-based learning** is growing.

- Continuing with the growing demand for **personalized learning**, formative methods are supplanting traditional, summative approaches (especially with regard to test taking). As a result, we are starting to see more EdTech firms with solutions that focus on formative assessments.

- **Robotics kits** are becoming better packaged (even for young students) and incorporate apps to teach coding.

- **Elements of AI** (albeit noncomplex) are becoming an integral part of responsive apps that adjust to various learning levels.

- EdTech firms have seen the emergence of opportunities to create apps for preschool and kindergarten students.

- 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. This may deter some U.S. education technology firms from entering smaller markets with unique languages or very specific curriculum standards and requirements.

- 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.
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 outlined below:

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

When it comes to emerging recruitment channels in China, we note that 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.

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.11 Based on research by Sea Master Education (https://www.seamastereducation.com/), 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.12

**Vocational Education and Community College**

In “China Education Modernization 2035”, one of the six key points is to significantly improve vocational education in China. In pursuit of this, China is building the world’s largest vocational education system. According to China’s Ministry of Education, there were 11,500 vocational schools and nearly 29 million students at the end of 2020.

The Chinese government hopes to increase the ability of the workforce and economy to adapt to rapid technological change, provide more skilled workers to support industry, and upgrade the numbers and quality of the workforce able to contribute to the adaptation to new technologies.

China’s central government promotes international cooperation and exchanges for vocational education. China has sent delegations to learn from the countries where vocational education is well-developed. China has also 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.

**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 2022, October 2022 – Beijing, Guangzhou, & Shanghai: https://www.chinaeducationexpo.com/english/index.shtml
• Global Education Technology Summit & Expo 2022- November 2022 – Beijing and Online: https://www.getchinaforum.com

RESOURCES

• U.S. Commercial Service – China: https://www.trade.gov/china
• 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
• China Education Association for International Exchange: http://en.ceaie.edu.cn/

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Email: Karic.Chen@trade.gov
1 Benchmarking the Performance of China's Education System (OECD) - https://read.oecd-ilibrary.org/education/benchmarking-the-performance-of-china-s-education-system_4ab33702-en#page5
2 China Daily released on Feb 2019
5 IIE Open Doors / China (opendoorsdata.org)
6 https://sieconnection.com/research
8 https://www.holoniq.com/edtech/10-charts-that-explain-the-global-education-technology-market/
9 http://www.iresearchchina.com/
12 https://www.seamastereducation.com/
UNESCO Student Mobility Number:
Colombia has 52,064 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 2020/21 academic year, Colombia ranked 19th in the world and 2nd 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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Colombian Students</td>
<td>8,060</td>
<td>7,787</td>
<td>7,107</td>
</tr>
<tr>
<td>% Change from Previous Year</td>
<td>1.1%</td>
<td>-3.4%</td>
<td>-8.7%</td>
</tr>
</tbody>
</table>
There were 7,107 Colombians who traveled to the United States to study in the 2020/21 academic year; a 8.7 percent decrease over the previous year as a result of the COVID-19 pandemic.

Colombian students in the U.S. are divided between graduate and undergraduate levels as follows:

**Colombian Students in the United States by Academic Level**

<table>
<thead>
<tr>
<th>Academic Level</th>
<th>2019/20</th>
<th>2020/21</th>
<th>% Total</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>3,031</td>
<td>2,660</td>
<td>37.4</td>
<td>-12.2</td>
</tr>
<tr>
<td>Graduate</td>
<td>2,877</td>
<td>2,847</td>
<td>40.1</td>
<td>-1.0</td>
</tr>
<tr>
<td>Non-Degree</td>
<td>607</td>
<td>326</td>
<td>4.6</td>
<td>-46.3</td>
</tr>
<tr>
<td>OPT</td>
<td>1,272</td>
<td>1,274</td>
<td>17.9</td>
<td>0.2</td>
</tr>
</tbody>
</table>

Based on the data, Colombian students in U.S. colleges and universities contributed USD 305 million to the U.S. economy in the 2020/21 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. In addition, partnerships between universities in the United States and higher education institutions in the Western Hemisphere serve to increase student exchange opportunities and strengthen regional education cooperation throughout the Americas.

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 2020, ICETEX had 8,656 Colombian students with loans and scholarships for graduate degrees, PhD, and ESL programs abroad.

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. Throughout 2020, COLFUTURO awarded 1,311 scholarships for master’s and PhD programs, with 252 of those scholarships being for programs in the United States. COLFUTURO has agreements with many universities, such as: Carnegie Mellon, Columbia University, Duke, Cornell, University of Florida, American University, Purdue University, Tulane University, New York University, University of Chicago, University of Texas, 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 have shown increasing interest in having agreements with U.S. universities that offer dual degree programs for their students. This can be accomplished through a combination of two or three years at the local university and one or two years at the U.S. university.

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

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.

RESOURCES

- U.S. Commercial Service - Colombia: https://www.trade.gov/colombia
- U.S. Commercial Service Global Education Team: http://trade.gov/education-industry
- Industry and Analysis, Office of Supply Chain, Professional & Business Services: https://www.trade.gov/professional-and-business-services
- Institute of International Education: http://www.iie.org
- UNESCO Student Mobility Number: http://uis.unesco.org/en/uis-student-flow
- 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
- EducationUSA: http://www.educationusa.state.gov

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UNESCO Student Mobility Number:
Croatia has 10,174 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 similar 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 (https://iro.hr/2018/07/19/enqa-objavila-novi-newsletter/), 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 give consideration to 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 2021 Open Doors data, there were 393 Croatian students studying in the United States in academic year 2020-2021, a 16.7% decrease 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 (http://www.croatia.rit.edu/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, 24sata.hr, jutarnji.hr, skole.hr, dnevnik.hr, net.hr, vecernji.hr, tportal.hr.

Job search platforms most used by students

The most used websites are: moj-posao.net, 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.

Recommendations for U.S. Study State Consortia and Education Institutions on Digital Outreach Strategies

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.

**RESOURCES**

- U.S. Commercial Service – Croatia: [https://www.trade.gov/croatia](https://www.trade.gov/croatia)
- U.S. & Foreign Commercial Service Global Education Team: [https://www.trade.gov/education-industry](https://www.trade.gov/education-industry)
- Industry and Analysis, Office of Supply Chain, Professional & Business Services: [https://www.trade.gov/professional-and-business-services](https://www.trade.gov/professional-and-business-services)
- Ministry of Science & Education: [https://mzo.gov.hr/en](https://mzo.gov.hr/en)
- Fulbright Commission: [https://hr.usembassy.gov/education-culture/alumni-corner/](https://hr.usembassy.gov/education-culture/alumni-corner/)
- Statistics office: [https://www.dzs.hr/default_e.htm](https://www.dzs.hr/default_e.htm)

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The Dominican Republic has 4,203 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 2020/21 academic year, the number of students from the Dominican Republic totaled 1,244, a 9.8% decrease from the previous academic year, which saw 1,379 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 six markets for Dominican students were:

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

SUB-SECTORS

Undergraduate Education

778 students from the Dominican Republic were enrolled in undergraduate programs in the United States during the 2020/21 academic year; this is a 9.3% decrease from the previous academic year.

Graduate Education

273 students from the Dominican Republic were enrolled in graduate programs in the United States during the 2020/21 academic year, a 2.5% decrease from the previous academic year.
Non-Degree

43 students from the Dominican Republic were enrolled in non-degree programs in the United States during the 2020/21 academic year, a 42.7% decrease from the previous academic year.

OPT

150 students from the Dominican Republic were enrolled in OPT programs in the United States during the 2020/21 academic year, a 9.6% decrease from 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.

INICIA Educación

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

Caribbean Hotel & Tourism Association Education Foundation (CHTAEF)

CHTAEF awards scholarships to students who have demonstrated a strong commitment to the industry and a potential for future success. The Foundation offers scholarships for Professional Development Courses and Full-Time Academic Courses in all areas of Hospitality and Tourism Management for Associate and Bachelor programs. CHTAEF scholarships average from $500 - $5,000 (USD) per academic year. All scholarships are for tuition costs only. Their website has an update indicating that due to the uncertain times the region and industry are currently experiencing, CHTAEF has temporarily suspended the 2021 scholarship application process and that they will be updating the site with more information as it develops: 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](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 Global Education Team: [www.trade.gov/education-industry](http://www.trade.gov/education-industry)
- Industry and Analysis, Office of Supply Chain, Professional & Business Services: [www.trade.gov/professional-and-business-services](http://www.trade.gov/professional-and-business-services)
• Institute for International Education Open Doors 2020: [https://www.iie.org/opendoors/](https://www.iie.org/opendoors/)
• Ministry of Higher Education of the DR: [https://mescyt.gob.do/becas-internacionales](https://mescyt.gob.do/becas-internacionales)
• INICIA Educación: [https://www.iniciaeducacion.org](https://www.iniciaeducacion.org)
• Fulbright: [https://eca.state.gov/fulbright/country/dominican-republic](https://eca.state.gov/fulbright/country/dominican-republic)

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UNESCO Student Mobility Number:
Egypt has 43,718 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 106.4 million people as of July 2021, with approximately 31% of school-going age. Consequently, Egypt has the largest student population in the MENA region, estimated at 23 million K-12 students in 2020, 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).

There is 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, three million students are enrolled in Egypt, which is 30.4% higher than the 2.3 million seven years ago. Postgraduate students jumped to 430,000, up 11.7% from 385,000 in 2014. In total, the number of Egyptians who study overseas has almost quadrupled over the past two decades, growing from 8,800 in 2000 to 34,900 in 2017-2018. The government has made reversing this trend a priority and is addressing it through its internationalization strategy. This includes regulations issued two years ago mandating 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 3,672 students from Egypt in the 2020-21 academic year, a 4.8% decrease 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 2020 report for Egypt:

- The reported number of internet users in Egypt increased by 9.8 million (+22%) between 2019 and 2020.
- There were 54 million estimated internet users in Egypt in January 2020.
- Facebook is the most used social media platform in Egypt (80.34%), followed by YouTube (13.42%), Twitter (3.65%), and Instagram (0.3%).
- There were about 42 million Facebook users in Egypt in January 2020, which accounted for 40.4% of the entire population of Egypt. The majority of them were men (63.5%). People aged 25 to 34 were the largest user group (14 million).
- There were 92.71 million mobile connections in Egypt in January 2020.

RESOURCES

- U.S. Commercial Service – Egypt: https://www.trade.gov/egypt
- 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
- IIE Open Doors - https://opendoorsdata.org/data/international-students/academic-level-and-places-of-origin/
- New Cairo Technological University - https://nctu.edu.eg/en/home/
- 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

Capital: Addis Ababa  
Population: 110.87 million (July 2021 est.)  
GDP (Purchasing Power Parity): $264.05 billion (2020 est., in 2017 dollars)  
Currency: Birr (ETB)  
Language: 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 taught in schools), Arabic (2007 est.)

UNESCO Student Mobility Number
Ethiopia has 7,626 students studying abroad according to UNESCO.

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

OVERVIEW

There is significant growth in academic institutions in Ethiopia and high potential for students who want to study abroad. Ethiopia is 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.

U.S. Study Abroad Students in Ethiopia

<table>
<thead>
<tr>
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<tbody>
<tr>
<td></td>
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<td>261</td>
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66  
U.S. Commercial Service
### Ethiopian Students Studying in U.S

<table>
<thead>
<tr>
<th>Students in U.S. by Academic Level</th>
<th>% By Academic Level</th>
<th>Number of Students</th>
<th>% Change (2020 to 2021)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>62.7%</td>
<td>1,358</td>
<td>-12.4%</td>
</tr>
<tr>
<td>Graduate</td>
<td>22.4%</td>
<td>485</td>
<td>3.2%</td>
</tr>
<tr>
<td>Non-Degree</td>
<td>4.3%</td>
<td>94</td>
<td>16.0%</td>
</tr>
<tr>
<td>OPT</td>
<td>10.6%</td>
<td>229</td>
<td>-10.2%</td>
</tr>
</tbody>
</table>

### SUB-SECTORS

#### Students in U.S. by Academic Level

<table>
<thead>
<tr>
<th>Year</th>
<th>Undergraduate</th>
<th>Graduate</th>
<th>Non-Degree</th>
<th>OPT</th>
<th>Total</th>
</tr>
</thead>
<tbody>
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<td>2012</td>
<td>1334</td>
<td>1463</td>
<td>1516</td>
<td>1472</td>
<td>2118</td>
</tr>
<tr>
<td>2013</td>
<td>1516</td>
<td>1472</td>
<td>1517</td>
<td>1847</td>
<td>2166</td>
</tr>
<tr>
<td>2014</td>
<td>1472</td>
<td>1517</td>
<td>1847</td>
<td>2118</td>
<td>2061</td>
</tr>
<tr>
<td>2015</td>
<td>1517</td>
<td>1847</td>
<td>2118</td>
<td>2061</td>
<td>2356</td>
</tr>
<tr>
<td>2016</td>
<td>1847</td>
<td>2118</td>
<td>2061</td>
<td>2356</td>
<td>2166</td>
</tr>
<tr>
<td>2017</td>
<td>2118</td>
<td>2061</td>
<td>2356</td>
<td>2166</td>
<td></td>
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<tr>
<td>2018</td>
<td>2061</td>
<td>2356</td>
<td>2166</td>
<td></td>
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<tr>
<td>2019</td>
<td>2356</td>
<td>2166</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 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

The most popular social media sites for students in Ethiopia are YouTube, Telegram, WhatsApp, Facebook, and TikTok. 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](https://trade.gov/ethiopia)
- U.S. Commercial Service Global Education Team: [https://trade.gov/education-industry](https://trade.gov/education-industry)
- Industry and Analysis, Office of Supply Chain, Professional & Business Services: [https://www.trade.gov/professional-and-business-services](https://www.trade.gov/professional-and-business-services)
- Federal Democratic Republic of Ethiopia Ministry of Education Website: [https://www.moe.gov.et](https://www.moe.gov.et)
- National Educational Assessment and Examinations Agency Website: [www.neaea.gov.et](http://www.neaea.gov.et)
- EducationUSA Advising Centers in Ethiopia: Addis Ababa
  - Email: AddisAbaba@educationusa.org
  - Telephone: +251 111307924/7625
  - Websites: [https://educationusa.state.gov/centers/educationusa-advising-center-addis-ababa](https://educationusa.state.gov/centers/educationusa-advising-center-addis-ababa) and [https://et.usembassy.gov/education-culture/study-usa/](https://et.usembassy.gov/education-culture/study-usa/)

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UNESCO Student Mobility Number:
France has 103,161 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 5,643 French students studying in the U.S., which accounts for 0.6% of the total number of international students in the United States. In 2020/21, the breakdown was as follows: 39% undergraduate students, 33.7% graduate students and 20.2% OPT (Optional Practical Training).

**Fields of Study**

In 2020/21, the preferred fields of study for French students in the United States were: Business/Management (23.7%), Engineering (15.3%), Math/computer science (10.5%) and Social Sciences (10.4%). Only .3% 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**

- AAWE-Council of International Schools, Paris College Day *(did not take place in Paris in October 2021, due to travel and planning restrictions. No information yet regarding a potential event in 2022.)* [https://www.aaweparis.org/](https://www.aaweparis.org/)

**RESOURCES**

- U.S. Commercial Service – France: [https://www.trade.gov/France](https://www.trade.gov/France)
- U.S. & Foreign Commercial Service Global Education Team: [https://www.trade.gov/education-industry](https://www.trade.gov/education-industry)
• Industry and Analysis, Office of Supply Chain, Professional & Business Services: https://www.trade.gov/professional-and-business-services
• Fulbright Commission: https://fulbright-france.org/

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UNESCO Student Mobility Number:  
Germany has 122,445 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

According to the Open Doors 2021 report, COVID-19 had an overall negative effect on foreign enrollment in the U.S. with a 15% decline in higher education compared to 2019/2020. The number of German students enrolled (5,364 students) in U.S. higher education reflected a 42% decrease compared to the previous academic year. This decrease is a result of the impact of the COVID-19 pandemic.

Undergraduate

During the 2020/2021 academic year, 2,403 German students studying in the United States were enrolled in undergraduate courses, which is a decrease of a 22.9% compared to the 2019/2020 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. The fact that it is possible for Germans to register at a community college without the “Abitur” requirement (an examination required to be eligible to attend a German university) also renders community colleges as an attractive option.
Graduate Education

During the 2020/2021 academic year, 2,022 German students studying in the United States were enrolled in graduate courses, a decrease of 19.9% compared to 2019/2020.

Secondary Education

In the academic year of 2019/2020, 4,913 German high school students participated in an exchange program from Germany.

Professional Training Services

During the 2020/2021 academic year, 647 German students in the United States pursued optional practical training, which is a decrease of 15.5% compared to 2019/2020.

Non-degree

292 Germans studying in the United States in 2020/2021 attended non-degree programs such as English language or short-term studies, which represents a 89.7% decrease compared to the previous year (2019/2020).

OPPORTUNITIES

Undergraduate and Graduate

Studying in the United States is particularly attractive to German engineering, business, and management, as well as math and social science students. One of the most effective ways for U.S. universities to attract German exchange students is to form a partnership with a German university. These partnership agreements facilitate the exchange of students and the recognition of course credits between the partner institutions.

As European universities implement the Bologna Process, which is meant to ensure more comparable, compatible, and coherent systems of higher education in Europe and shift to a three-tier bachelor/master/doctorate system of education, European credits and degrees are becoming easier to compare with those of U.S. universities. However, a couple of obstacles for German students planning to study in the United States remain. Cost is the most frequently quoted barrier, especially 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 the German Academic Exchange Service (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 EducationUSA centers: https://educationusa.state.gov/country/de of the U.S. Department of State in Germany. There are also several events focused on student recruitment, listed at the end of the report, which take place in Germany.
Community College

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

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.

Secondary Education

Most German high school students prefer to study in an English-speaking country, with the U.S. and Canada being the most popular study abroad destinations. 87.7% of German high school exchange students stay in the U.S. for their whole academic year.

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. According to the DAAD, almost half of German universities switched exclusively to virtual learning in the 2020 summer semester (47%), and almost as many to a hybrid model of in-presence and virtual learning (45%).

Research and Development

Education and research are major priorities for the German Federal Government. The Pact for Research and Innovation’s (‘Pakt für Forschung und Innovation’) objective is to stabilize and increase funding for the main non-university research organizations (Fraunhofer-Society, Helmholtz-Association, Max-Planck-Society, Leibniz-Association, German Research Foundation) with 5% annual funding increases. The increases in funding are tied to research policy objectives that are also included in the Pact. Federal and Laender (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, 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.
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 (February 1-3, 2022, Karlsruhe): http://www.learntec.de/en
• Didacta (March 7-11, 2023, Stuttgart): http://www.messe-stuttgart.de/didacta/en
• Zukunft Personal (April 5-6, 2022, Stuttgart): http://www.zukunft-personal.de/en
• EducationUSA: https://educationusa.state.gov/country/de
• QS World MBA Tour: http://www.topmba.com/events/qs-world-mba-tour
• International College Days: https://collegedayfairs.org/
• Jugendbildungsmesse: https://jugendbildungsmesse.de/

RESOURCES

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

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UNESCO Student Mobility Number:
Ghana has 17,212 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. Between 1960 and 1967 alone, the number of children enrolled in public elementary schools more than doubled (http://www.create-rpc.org/pdf_documents/PTA42.pdf). Estimated at less than 20 percent at the time of independence, Ghana’s adult literacy rate shot up to 58 percent by the year 2000 (https://knoema.es/atlas/Ghana/topics/Educacion/Alfabetizacion/indice-de-alfabetizacion-en-adultos).

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/divisions/tvet), and the National Council for Tertiary Education (NCTE – http://ncte.edu.gh/) 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 (https://educationinnovations.org/sites/default/files/ghana_hh_survey_policybrief.pdf). 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/exams/bece.aspx).

In 2017, 468,053 students in Ghana sat for the BECE – a sizeable increase over the 422,946 in 2014 (https://www.waecgh.org/examstatistics/bece.aspx). 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” (https://wikieducator.org/images/a/ac/gsa_paper_cape_coast_article.pdf). 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-waeccs-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 eight-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.

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 (https://www.universityworldnews.com/post.php?story=20110917103932187). In 2018, the Ghanaian Ministry of Education made similar complaints (https://www.ghanaweb.com/ghanahomepage/newsarchive/weed-out-unqualified-students-or-face-consequences-ministry-warns-universities-colleges-621510).

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 (https://www.universityworldnews.com/post.php?story=20090626115442537 and http://www.nab.gov.gh/). 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 (https://www.ghanaweb.com/ghanahomepage/newsarchive/lecturers-in-short-supply-in-public-universities-511676).
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 (https://www.ghanaweb.com/ghanahomepage/newsarchive/145-000-shs-graduates-to-enter-varsities-others-in-2020-689617).

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 (https://www.ncbi.nlm.nih.gov/pmc/articles/PMC4310336/ and https://www.researchgate.net/publication/265393597_the_medical_system_in_ghana).

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 (GEMP – https://admission.ug.edu.gh/applying/gemp/overview/), 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 (https://gcps.edu.gh/admissions/).

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 (DBE – https://www.researchgate.net/publication/289815964_teacher_education_in_ghana_a_contemporary_synopsis_and_matters ARISING). However, the government is currently implementing major reforms in teacher education and has mandated that all teachers must have a four-year bachelor’s degree in an effort to raise teaching standards. 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” (https://www.universityworldnews.com/post.php?story=20180620142056834). 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 (https://www.myjoyonline.com/news/2018/july-13th/govt-to-roll-out-new-curriculum-for-colleges-of-education-in-october.php).
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 2021 IIE Open Doors Report, Ghanian students in the U.S. numbered 1,064 undergraduate, 2,309 graduate, 131 non-degree, and 725 OPT.

Top Areas of Study for Ghanaian Students

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

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. According to the 2019/20 IIE Data there was a 62.9% decrease in the number of U.S. students who studied abroad in Ghana. However, in the 2017/18 IIE Data, Ghana experienced an 18.5% increase in the number of U.S. students who studied abroad in Ghana and maintained its spot as the number two preferred destination in Sub-Saharan Africa, which opened opportunities for exchange programs between Ghana and the U.S.
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, 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: https://www.worldviewevents.com/
- Various Embassies’ education fairs
- ISN Expo: https://isnexpo.com/

RESOURCES

- U.S. Commercial Service- Ghana: https://trade.gov/ghan
- U.S. Commercial Service Global Education Team: https://trade.gov/education-industry
- Industry and Analysis, Office of Supply Chain, Professional & Business Services: https://www.trade.gov/professional-and-business-services
- EducationUSA/Fulbright: https://gh.usembassy.gov/education-culture/educationusa-center/
- UHY Articles: https://www.uhy.com/the-worlds-fastest-growing-middle-class/

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UNESCO Student Mobility Number:
Greece has 39,632 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. The Ministry of Education and Religious affairs oversees administering the budget, developing the curriculum, and managing all schools in the public system. This includes managing examinations such as the infamous Panhellenic exams that determine which public university a student can attend based on exam performance.

Education is compulsory for all children between the ages of 4 and 15 years. A recent development is that as of September 2021, pre-school education starting at the age of 4 is now mandatory for all children in Greece.

The Education system is divided into Early Education and Care for children up to the age of 6, Primary Education for school children between the age of 6-12 and Secondary Education for teenagers between the ages of 12-18 years. 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 that attend high school can pursue Higher Education, which includes University level education, as described in the United States.

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. Over the years, the Ministry of Education and Religious Affairs has made significant changes, most of which were mandated by the wish of each Administration to adopt recent scientific findings and/or acclaimed education models from other nations. This was the goal for the new Greek Government elected in July of 2019, which proceeded to implement many changes within the structure of the Ministry itself, while reinforcing the need for a modernized and career enhancing education curriculum coupled with a long delayed and contested proper evaluation system for teachers. While the reforms have been many, the focus has been on addressing a system that allows for significant disparities between public schools and the need for parents to supplement competitive advantage through after-hour cram schools, often taught by the same teachers from the school students attend during the day. This, paired with a weak system for teacher evaluation and an outdated curriculum with a heavy focus on liberal arts, have been noted items for reform.
According to the Open Doors 2021 survey findings published by the Institute of International Education (IIE), a total of 2,256 Greek students were studying at U.S. institutions during the 2020/21 academic year, a slight decrease compared to the previous year where 2,489 students studied in the United States (decrease of 9.4%). Of the 2,256 Greek students in the U.S. on educational exchanges during the 2020/21 academic year, almost half (1,055) attended graduate programs, 694 students attended undergraduate programs, and the rest attended other, non-degree programs.

**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. Study takes 4 years for most majors, apart from Polytechnics that lasts 5 and Medicine that lasts 6, and there is flexibility to retake courses. Additionally, while not universities, there are schools that provide Diploma degrees known as IEK (Institute of Vocational Training). IEK programs are typically 2-3 years.

Private Universities in Greece are not awarded the title of being known as a “university.” 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 and robust standards. Greece has The American College of Greece (ACG), which 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 currently 15 TEI's 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 has since then given the opportunity to a great number of local students to participate in graduate and/or undergraduate programs through distance learning.
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. Education abroad has been something Greeks have been receptive to due to the access to universities in the larger European Union, which previously included the United Kingdom. Until Brexit, the U.K. had been the preferred destination, 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 for 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 portion of the population to send their children out of the country, even to expensive foreign universities, in search of better post-graduate employment prospects. Many comment that there have been three major waves of immigration from Greece to the United States, and that the last one following the financial crisis has brought in an incredibly educated and multifaceted group.

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

U.S. Commercial Service Athens can assist U.S. universities and education-related firms with entering the Greek market. We are able to do so by 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 across the region who were interested in learning more about programs in the United States.

Unfortunately, in Greece, studying abroad entails a lot of personal effort and research by the student, since there are no consulting agencies to assist. Fulbright Greece does have an EducationUSA office that offers support to students interested in learning more about studying in the United States and there are four 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 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
- American School of Classical Studies at Athens
- The American College of Greece
- American Farm School/Perrotis College
- Anatolia College/American College of Thessaloniki
- College Year in Athens
- Hellenic-American Educational Foundation (Athens College-Psychiko College)
- Hellenic American University
- Pinewood-American International School of Thessaloniki
- American Community Schools (ACS)
- New York University in Athens
- Princeton Athens Center
- Harvard Center for Hellenic Studies
- Webster University in Athens
WEB RESOURCES

• U.S. Commercial Service – Greece: http://trade.gov/Greece
• U.S. Commercial Service Global Education Team: https://trade.gov/education-industry
• Industry and Analysis, Office of Supply Chain, Professional & Business Services: https://www.trade.gov/professional-and-business-services
• Fulbright: https://www.fulbright.gr/en
• U.S. Embassy: https://gr.usembassy.gov/
• IIE: https://www.iie.org/opendoors/

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HONG KONG

**Capital:** Hong Kong  
**Population:** 7.3 million (July 2021 est.)  
**GDP (Purchasing Power Parity):** $420.1 billion (2020 est., in 2017 dollars)  
**Currency:** Hong Kong dollars (HKD)  
**Language:** Cantonese, English, Mandarin, or other Chinese dialects

**UNESCO Student Mobility Number:**  
Hong Kong has 36,100 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 5,878 students studying in the United States during the 2020-2021 academic year, with 58% 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. 58% of the 5,878 Hong Kong students studying in the United States during the 2020-2021 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 2020-2021, 22% of Hong Kong students studying in the 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

- **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
• U.S. Commercial Service Global Education Team: https://trade.gov/education-industry
• Industry and Analysis, Office of Supply Chain, Professional & Business Services: www.trade.gov/professional-and-business-services
• EducationUSA: https://educationusa.state.gov/centers/us-consulate-hong-kong-and-macau

U.S. COMMERCIAL SERVICE CONTACT

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HUNGARY

Capital: Budapest
Population: 9.7 million (July 2021 est.)
GDP (Purchasing Power Parity): $302.3 billion (2020 est., in 2017 dollars)
Currency: Hungarian Forint (HUF)
Language: Hungarian

UNESCO Student Mobility Number
Hungary has 13,038 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. One major difference is the increasing number of church-funded schools that incorporate 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 (between 25–34 years old) remains substantially 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. In 2019, Hungary invested a total of USD 7,153 per student on primary to tertiary education compared to USD 10,454 on average across OECD countries. This represents 3.8% of the national GDP, compared to 4.9% on average across OECD countries.

SUB-SECTORS

Higher Education

According to the 2021 Open Doors Report, the United States hosted 914,095 international students in its schools in the 2020/2021 school year, a decrease of 15%. There were 653 international students from Hungary at U.S. higher education institutions in 2020/21 which is 9.8% less compared to the previous academic year. In 2019, 727 students from Hungary studied in the United States, according to the Global Flow of Tertiary-Level Students research from UNESCO. 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 institutions 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. 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 at two types of institutions, egyetem (university) and főiskola (college), both offer courses in all three training cycles (i.e., Bachelor course, Master course and Doctoral course). In 2020, 79,000 people applied for full-time undergraduate and master’s degree programs in Hungary, 3,700 more than the previous year. 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.

**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.

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 688 Hungarian students. (Source: https://www.educationfair.nl/market-reports/europe/hungary/)
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 undergraduate students, graduate students, teachers, researchers and even for secondary educators and students as well.

Hungary is also part of the Erasmus+ Program. The 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 2020 Hungary spent EUR 43 million on the Erasmus+ Program.

The Campus Mundi program supports the development 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 2020, 87.5% 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 2019 among the 25-34 age group. In terms of accessing information online, Google was the most important search engine in Hungary as of November 2021 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: https://allasborze.jobline.hu/
• EDUCATIO Education Fair: https://www.educatioexpo.hu/nyitolap#home

RESOURCES

• U.S. Commercial Service - Hungary: https://www.trade.gov/hungary
• U.S. 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
• Fulbright Commission: http://www.fulbright.hu/
• Campus Mundi: https://tka.hu/palyazatok/4811/campus-mundi
• Hungarian Digital Education Association: https://mdoe.hu/digitalis-oktatas/alkalmazasok-weboldalak-tavoktatashoz-pedagogusoknak/
• Hungarian Market Report: https://www.educationfair.nl/market-reports/europe/hungary/
• OECD – Hungary: https://gpseducation.oecd.org/countryprofile/?primaryCountry=HUN&treshold=10&topic=EO

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UNESCO Student Mobility Number
India has 461,792 students studying abroad according to UNESCO.

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

OVERVIEW

Emphasis on higher education in India has grown significantly in the past two decades. India has one of the largest higher education systems in the world, behind only China and the United States. Per 2021 University Grants Commission (UGC) statistics, there are 998 universities in the country, including 429 state universities, 125 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 380 private universities. India has 130 Institutes of National Importance, a status conferred on premier public higher education institutions who receive special recognition and funding from the Government. In addition, the Institutes of Eminence (IOE) guidelines were launched to empower higher education institutions 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 IOEs. Together they offer a wide range of degree and diploma programs.

The UGC is the 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 demand/supply gap, participation of a large number of private players, growth of the IT sector, demand for a skilled workforce, increasing FDI, disruptive innovation, and online education have led to significant growth in this sector.

In July 2020, the GOI announced its National Education Policy 2020 (NEP), which replaced the National Education Policy of 1986. The new NEP is the government’s vision statement for transforming the education sector. Though policy drafting and implementation will take time, the NEP provides insight into India’s priorities. For example, India plans to allow foreign universities (those ranked in the top 500 worldwide) to confer degrees and establish campuses in India. Students will be allowed the option of completing their bachelor’s degree in four years (instead of the current three years) and can use part of the additional year for research. Prime capital
Population: 1.3 billion (July 2021 est.)
GDP (Purchasing Power Parity): $8.443 trillion (2020 est., in 2017 dollars)
Currency: Indian rupees (INR)
Language: Hindi
Minister Modi’s recent statements about developing a curriculum that creates global citizens and giving greater autonomy to high-performing Indian education institutions bodes well for greater collaboration between U.S. and Indian schools.

India is 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 economies and international recruitment specialists anticipate a strong recovery post-COVID.

**SUB-SECTORS**

As per the annual Open Doors Report in the 2020–21 academic year, 167,582 Indian students (at the graduate/undergraduate levels and those undertaking Optional Practical Training) were studying in the United States. India is the second highest source of students coming to the United States, contributing approximately 18 percent of the total foreign student population. Of the Indian student population in the United States, 41.1 percent are graduate students, 14.2 percent are undergraduate students, and 43.9 percent are classified as pursuing Optional Practical Training (OPT). The number of Indian students in the United States dropped by 13.2 percent during the 2020-21 academic year.

Traditionally, most Indian students studying in the United States opt for STEM and business studies. Out of the 167,582 Indian students, 34.8 percent study math and computer science, 33.5 percent choose engineering, and 11.7 percent select business studies/management. The study abroad market in India is seeing a steady rise in competition from Canada, the United Kingdom, Germany, Australia, and New Zealand. Indian students are choosing to study in these countries because of flexible visa and other immigration friendly policies and longer post-study Optional Practical Training (OPT) conditions. However, the U.S. still stands as the most preferred destination for higher education with significantly more attractive OPT opportunities. The U.S. Mission in India issued over 62,000 students and exchange visitor visas during the summer of 2021, a testament to the fact that Indian students prefer the U.S. for higher education.

**Undergraduate and Graduate**

India is a strong market for U.S. graduate studies with 70 percent of Indian students pursuing graduate degrees. Indian students accounted for the second highest number of foreign graduate students studying in the U.S. Undergraduate candidates comprise 30 percent of Indian students and has been the engine for growth of new Indian students traveling to the U.S. for their education experience.

Over 30 percent of India’s population is entering college age, which will fuel continued growth in demand for higher education. According to industry insiders, India lacks the infrastructure to meet this growing demand. Limited scholarships and the increasing cost of a U.S. education are major deterrents to U.S. institutions attracting Indian students. In 2020, India contributed the second highest number of undergraduate international students to the U.S.

The undergraduate and graduate recruitment market in India is highly competitive. Indian students take into account numerous considerations, such as university rankings, CPT/OPT options, and financial aid when choosing a university. In their promotional materials, U.S.
schools should underscore any niche offerings, safety, on-campus employment, and campus life when marketing its programs in India. It is highly recommended that universities leverage their alumni networks when marketing internationally.

**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 these institutions is still in a nascent stage and will require more market development amongst future Indian undergraduate students. India ranks eighth for international students studying at community colleges.

**Secondary Education**

The Indian market for high school and other U.S. secondary education is underdeveloped. Cultural factors, along with burgeoning numbers of international schools in India, are the largest factors for this lack of demand.

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

<table>
<thead>
<tr>
<th>Academic Level</th>
<th>2017/18</th>
<th>2018/19</th>
<th>2019/20</th>
<th>2020/21</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>23,346</td>
<td>24,813</td>
<td>25,032</td>
<td>23,734</td>
</tr>
<tr>
<td>Graduate</td>
<td>95,651</td>
<td>90,333</td>
<td>85,160</td>
<td>68,869</td>
</tr>
<tr>
<td>Non-degree</td>
<td>1,884</td>
<td>2,238</td>
<td>1,759</td>
<td>1,378</td>
</tr>
<tr>
<td>OPT</td>
<td>75,390</td>
<td>84,630</td>
<td>81,173</td>
<td>73,601</td>
</tr>
</tbody>
</table>

Source: IIE Open Doors Report

**OPPORTUNITIES**

**Twinning Programs**

In a twinning arrangement, students begin their studies in India and finish with a partner institution overseas. Indian higher education institutions are finding it easier to establish partnerships with overseas institutions that allow for such agreements. A growing number of universities and Institutions of Eminence, which enjoy complete autonomy, are keen to explore collaboration with foreign institutions for twinning programs.

**Dual Degree Programs**

The NEP will allow Indian students to earn a dual degree, one each conferred by an Indian and a foreign higher education institution. Credits acquired may be counted toward a degree;
however, schools must conduct proper 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 programs in various disciplines.

**Curriculum Development**

Indian universities are now looking to offer balanced, articulate, and well-structured programs of international standards to their students, and are keen to collaborate with top-ranked foreign universities in developing their 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 a short time ranging from two weeks to a full semester. Indian schools are receptive to working with U.S. institutions for student exchange and specialty short-term programs.

**Faculty Exchange Programs**

Faculty exchange programs allow faculty to teach or conduct research for short periods at a partner overseas university or college. Faculty are exposed to varied cultures while exchanging ideas and observing a variety of styles in a different setting. Indian schools are enthusiastic about exploring such opportunities and are eager to collaborate with overseas institutions to pursue such 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. There is currently limited collaboration between universities and industry in India. 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 working internationally on systemic support and institutional models.

**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.

**Online Programs**

According to Indian industry sources, the market for online education in India is expected to exceed $11 billion by 2026. The pandemic has accelerated this trend as Indian schools, like other school systems worldwide, are moving to online classes. 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 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. firms and schools providing professional training services have opportunities to establish strategic alliances with partners in India.

Service Providers

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

DIGITAL MARKETING STRATEGIES

As the world continues to grapple with the COVID-19 virus, more and more global higher education institutions are using new strategies and digital marketing 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 (USCS) has been at the forefront by bringing virtual tools to U.S. schools, allowing them to continue recruitment efforts during these challenging times. To meet the needs of its clients, USCS has refreshed its service offerings to support U.S. schools in this arena and offers customized solutions and programs, such as Virtual Education Fairs, Virtual Connection Programs, and personalized Virtual Trade Missions. These programs have proven to be extremely successful to schools seeking to collaborate with appropriate partners for their recruiting efforts, and to facilitate collaboration between U.S. and Indian universities.

EVENTS

DIDAC India, September 21-23, 2022, Bengaluru International Exhibition Center, Bengaluru, State of Karnataka, India: https://didacindia.com/. Held annually, DIDAC India is an international exhibition and conference that focuses on education resources and Training & Technology based solutions. The show is supported by ministries in the Government of India and several well-known international education associations.

RESOURCES

- U.S. Commercial Service - India: https://www.trade.gov/india
- U.S. 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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UNESCO Student Mobility Number
Indonesia has 53,604 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 275 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 will be 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 2020-2021 academic year, 7,489 students from Indonesia were studying in the U.S. (down 9.8% from the previous year due to COVID-19). Indonesia is the seventeenth 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.**

<table>
<thead>
<tr>
<th>Year</th>
<th>Business/Management</th>
<th>Engineering</th>
<th>Life Science</th>
<th>Math &amp; Computer Science</th>
<th>Health Professions</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>30.3%</td>
<td>16%</td>
<td>6.5%</td>
<td>7.1%</td>
<td>1.9%</td>
</tr>
<tr>
<td>2018</td>
<td>28%</td>
<td>17.8%</td>
<td>6.8%</td>
<td>8.5%</td>
<td>1.9%</td>
</tr>
<tr>
<td>2019</td>
<td>27.4%</td>
<td>16.7%</td>
<td>6.5%</td>
<td>10%</td>
<td>1.5%</td>
</tr>
<tr>
<td>2020</td>
<td>23.4%</td>
<td>15.1%</td>
<td>6.8%</td>
<td>18.9%</td>
<td>1.8%</td>
</tr>
<tr>
<td>2021</td>
<td>24%</td>
<td>19.1%</td>
<td>7.1%</td>
<td>12.5%</td>
<td>1.8%</td>
</tr>
</tbody>
</table>

*Source: Open Doors 2021*

**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.
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. Data from the Education and Culture Ministry shows that Indonesia currently has more than 14,000 vocational schools, each of which specializes in one of several fields, including tourism, business, maritime industries, and machinery. 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. 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. In the 2020-2021 school year, there were approximately 5.3 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 336,000 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.

In Indonesia, over 530,000 schools have closed amid the coronavirus outbreak, affecting 68 million students from pre-primary through tertiary levels and making the need for effective education technology (EdTech) extremely urgent. Local platforms, such as “Ruangguru” (an interactive e-learning platform for K-12 students in Indonesia) and “Cakap” by Squline (a tutoring platform for language learning), have grown during this time, but overall, the sector is still emerging.

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

Many students in rural areas lack connectivity and many lower-income students lack access to the devices needed to use EdTech tools. This contrasts with lower-tech options such as television; according to data from the 2018 national socio-economic survey, 95% of students accessed TV in the prior week (96.6% in urban and 92.3% in rural areas).

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

Due to the COVID-19 situation in Indonesia, there are many virtual education fairs being held:

• Indonesia International Education & Training Expo 2022: https://ina-eduexpo.com/
• EduTech Expo 2022: https://edutech.id/index.html
• Global Educational Supplies & Solutions (GESS) Indonesia 2022: https://www.gessindonesia.com/

RESOURCES

• U.S. Commercial Service - Indonesia: https://trade.gov/indonesia
• U.S. 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
• 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/
• Institute of International Education: https://opendoorsdata.org/
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UNESCO Student Mobility Number:
Japan has 32,365 students studying abroad according to UNESCO.

CIA World Factbook:
22% of Japan's population is under 25 years old.

OVERVIEW

During the 2020/21 academic year, Japan had the eleventh largest population of international students studying in the United States. There were 11,785 Japanese students studying in the United States, a 32.9 percent decrease from the previous year. UNESCO's data indicates that 46 percent of the Japanese students that studied abroad traveled to the United States as their education destination. Trailing behind the U.S. are Australia, the United Kingdom, Germany, and Canada.

From 1994-1998, Japan was the top country of origin for international students in the United States. Since then, Japan has dropped to eleventh place due to various circumstances, including challenging economic conditions and a low birth rate. Additionally, many countries, such as Australia and China, have increased their recruiting efforts to attract more Japanese students. Japan's downward trend reached its lowest point in the 2015/16 academic year. Despite this, the United States remains the most popular destination for Japanese studying abroad. The U.S. Department of Commerce estimates that in 2020, Japanese students studying in the United States contributed $584 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...
In December 2019, the GOJ approved MEXT’s supplementary budget at approximately $2.2 billion, for the Global Innovation Gateway for All (GIGA) school project. In 2021, Japan’s goal of “one device per one student” has been largely reached. 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”.

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. Please visit https://teamup-usjapan.org/ for more information.

### Higher Education

<table>
<thead>
<tr>
<th>Academic Level</th>
<th>2019/20</th>
<th>2020/21</th>
<th>% Total</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>8,684</td>
<td>7,243</td>
<td>61.5</td>
<td>-16.6</td>
</tr>
<tr>
<td>Graduate Education</td>
<td>2,774</td>
<td>2,678</td>
<td>22.7</td>
<td>-3.5</td>
</tr>
<tr>
<td>Non-degree</td>
<td>4,621</td>
<td>744</td>
<td>6.3</td>
<td>-83.9</td>
</tr>
<tr>
<td>Optional Practical Training</td>
<td>1,475</td>
<td>1,120</td>
<td>9.5</td>
<td>-24.1</td>
</tr>
<tr>
<td>Japanese students total</td>
<td>17,554</td>
<td>11,785</td>
<td>100</td>
<td>-32.9</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Community College</th>
<th>2019/20</th>
<th>2020/21</th>
<th>% of Total</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>4,751</td>
<td>3,309</td>
<td>5.5</td>
<td>-30.3</td>
</tr>
<tr>
<td>World total</td>
<td>79,187</td>
<td>60,170</td>
<td>100</td>
<td>-24.0</td>
</tr>
</tbody>
</table>

(Source: The Institute of International Education (IIE), 2021 Open Doors Report)
In the 2020/21 academic year, Japan's ranking decreased from 8th to 11th place in terms of overall higher education. Japan has dropped one place since last year's ranking and ranks 4th with community colleges.

**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**

Following China (25%) and Saudi Arabia (18%), Japan is the third leading country of origin for students studying in Intensive English Programs in the United States. During the 2020 academic year, 5,285 Japanese students participated in Intensive English Programs in the U.S., marking a 56.6 percent decrease from the previous year. According to the Japan Association of Overseas Studies (JAOS), which comprises 40 study abroad agents, Japan has a high ratio of agent usage for the English-studying market. JAOS' survey shows that about 60 percent of their clients that decide to study in the U.S. choose Intensive English Programs, including non-academic studies.

**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. It 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:

<table>
<thead>
<tr>
<th></th>
<th>Summer Break</th>
<th>Winter Break</th>
<th>Spring Break</th>
</tr>
</thead>
<tbody>
<tr>
<td>Higher Education</td>
<td>late July - late Sep.</td>
<td>late Dec. - early Jan.</td>
<td>Feb./March - early April</td>
</tr>
<tr>
<td>Secondary Education</td>
<td>late July - late Aug.</td>
<td>late Dec. - early Jan.</td>
<td>late March - early April</td>
</tr>
</tbody>
</table>

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 2020, the Ministry of Internal Affairs and Communication (MIC) released a survey report that LINE ranked the most popular social media among teenagers in Japan (93.7%), followed by Instagram (69.0%) and Twitter (67.6%). 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. Japanese students routinely visit Facebook searching for educational information.

**EVENTS**

- **EducationUSA Virtual Fair Japan** in April, summer, and fall 2022 (TBD): EducationUSA Japan is organizing several virtual fairs in 2022. 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 2022 (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.

- **Western Japan College Fair** in fall 2022 (TBD): The fair is organized by the Canadian Academy and Osaka International School of Kwansei Gakuin in fall 2022. 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 2022: https://www.boardingschools.com/

**RESOURCES**

- U.S. Commercial Service – Japan: https://www.trade.gov/japan
- U.S. Commercial Service Global Education Team: https://trade.gov/education-industry
- Industry and Analysis, Office of Supply Chain, Professional & Business Services: https://www.trade.gov/professional-and-business-services
- JAFSA, Japan Network for International Education: https://www.jafsa.org/en/
- Fulbright Japan: http://www.fulbright.jp/eng/index.html
- EducationUSA Tokyo: https://educationusa.state.gov/centers/educationusa-tokyo

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1 Source: The Institute of International Education (IIE), Open Doors https://opendoorsdata.org/fact_sheets/japan/

2 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
UNESCO Student Mobility Number:
Jordan has 27,930 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 2020-2021, the number of Jordanian students studying in the United States was 2,338, a decline of 4.2% from the previous year. The majority of Jordanian students in the U.S. are studying at the graduate level (44%), with 38% studying at the undergraduate level, and 18% 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.

Per the latest UNESCO Institute for Statistics data, the United States hosted the third largest number of Jordanian students (2,368), following Turkey (2,643) and Saudi Arabia (2,749).

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.

RESOURCES

- U.S. Commercial Service – Jordan: https://www.trade.gov/jordan
- 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
- AMIDEAST Jordan: http://www.amideast.org/jordan
- Education Jordan, based in the U.S. Embassy, Amman: https://educationusa.state.gov/centers/us-embassy-jordan
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UNESCO Student Mobility Number:
Kazakhstan has 89,292 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 1,830 studied in the United States (2020/21).

At the moment, 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 million. 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. The 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.

Now, fewer than 10% of potential Kazakhstani applicants are studying in the United States. Out of more than 100,000 students studying overseas, 80% are self-funded. Only 1,830 students from Kazakhstan are currently studying in the U.S. with 42% studying at Bachelor’s level. Demand for education abroad is stable.

**SUB-SECTORS**

**Higher Education**

There are opportunities for U.S. higher education institutions to attract students from Kazakhstan. Now, fewer than 5% of potential Kazakhstani students overseas are studying in the U.S., and out of 80,000 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

794 students from Kazakhstan were enrolled in undergraduate programs in the United States in 2020/21.

Graduate Education

645 students from Kazakhstan were enrolled in graduate programs in the United States in 2020/21 and over 343 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 people.
EVENTS


• **Begin Online Fairs – 2022**, April 9, 2022, Kazakhstan & Central Asia: https://begingroup.com/en/fairs/begin-online-fairs-ii/

• **Education and Science of the XXI Century**, November 2022 (exact date TBD), Nur-Sultan, Kazakhstan: https://www.eduexpoastana.kz/

• **WEBA Kazakhstan Agent Workshops**, April 9-10, 2023, Almaty, Kazakhstan: https://www.webaworld.com/event/kazakhstan/Weba-Agents-Workshops-Kazakhstan1.php

RESOURCES

• U.S. Commercial Service – Kazakhstan: https://www.trade.gov/kazakhstan

• 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

• Kazakhstan’s Ministry of Education and Science: http://www.edu.gov.kz/en

• Bolashak Scholarship Program: http://www.bolashak.gov.kz

• EducationUSA Kazakhstan: https://educationusakazakhstan.kz/en/

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**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 shutdown 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

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

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.

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):** February 26-27, 2022, Nairobi, Kenya
- 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](https://www.trade.gov/kenya)
- U.S. & Foreign Commercial Service Global Education Team: [https://www.trade.gov/education-industry](https://www.trade.gov/education-industry)
- Industry and Analysis, Office of Supply Chain, Professional & Business Services: [https://www.trade.gov/professional-and-business-services](https://www.trade.gov/professional-and-business-services)

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UNESCO Student Mobility Number:
Kuwait has 24,437 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. The government has spent $1.14 billion on facilities, including $882 million to rebuild old schools, as well as to create new facilities. The budget allocated for the fiscal year of 2020/2021 is approximately $7 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 2021, the Kuwaiti government provided 4,003 external scholarships (against 15,929 internal scholarships awarded to local private universities and the only public university, Kuwait University), an increase of 40% compared to 2020 (2,848 scholarships). Of this number, 31.5% of the scholarships (1,245) awarded are provided to students pursuing education in the United States. Engineering programs in the U.S. remains the number one destination for Kuwaiti students, with a wide range of programs offered by the U.S. compared to other countries. Engineering scholarships comprised 66% of total scholarships to the U.S.

In 2018, the Ministry of Higher Education 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, and the Education Ministry’s unclear position on resuming public sector education), the percentage of U.S. scholarship recipients has decreased compared to prior years, comprising 31.5% of the total scholarships.
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 eleven universities in Kuwait. Kuwait University, the only public university, graduates approximately 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 partially opened its doors to students in September 2019. The other universities are private: 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 College and Gulf University of Science and Technology.

Training

There is also high demand for vocational and non-degree training. The Ministry of Defense contracts with a foreign language institute to offer English language instruction to its personnel. The Kuwait Chamber of Commerce and Industry (KCCI) delivers various training programs for the private and government sectors. The Public Authority for Applied Education and Training provides programs for graduates seeking employment at government ministries, departments, and agencies.

According to industry sources, the government has created a $5.6 billion education market that is steady and offers many opportunities for U.S universities and suppliers of products and services. The United States leads the industry with 20% market share, followed by Japan, the United Kingdom, and several Asian countries. U.S. products are highly respected by the MOE, but companies seeking business here have to be competitive, flexible, and well-connected to compete for government projects.

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
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_mcph_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. The Embassy also provides advice and counseling to students on applying to accredited U.S. education institutions.

Another effective way to promote your university to Kuwaiti high schools is via the U.S. Commercial Service Gold Key Service. We can arrange 1-2 days of appointments with high 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
• U.S. Commercial Service Global Education Team: https://trade.gov/education-industry
• Industry and Analysis, Office of Supply Chain, Professional & Business Services: http://www.trade.gov/professional-and-business-services

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UNESCO Student Mobility Number:
Lebanon has 18,630 students studying abroad according to UNESCO.

CIA World Factbook:
35.73% of the population in Lebanon is under 25 years old.

OVERVIEW

Lebanon has ranked globally as the 4th best country for math and science education, and as the 10th best overall for quality of education according to the World Economic Forum. The literacy rate is 95.07% according to the World Bank (2018).

The provision of education in Lebanon is the responsibility of the Ministry of Education and Higher Education (MEHE). The Center for Educational Research and Development (CRDP) which is linked directly to MEHE, is a national institution concerned with educational modernization and development by setting educational plans and policies and directing educational curricula. The Lebanese educational system is divided in two sectors: private schools and universities, for which there is a charge for admission, and public (government) schools and universities that are practically free of charge.

Lebanon has approximately 40 licensed universities and higher-education institutions, an unusually large number for a country with a population estimated at six million. The top 10 universities are: American University of Beirut (AUB), Lebanese American University (LAU), Université Saint Joseph (USJ), Notre Dame University (NDU), Université Saint Esprit Kaslik (USEK), University of Balamand, Haigazian University, Beirut Arab University (BAU), Lebanese University (UL). According to CRDP, Lebanon registered in 2019-2020 academic year 222,064 Lebanese and foreign students of which 79,325 attended the public university (UL) and 142,739 attended private universities.

Lebanon has 2,796 schools. According to CRDP, 44% are public schools and 56% are private schools. In 2020-2021 academic year, Lebanon registered 1,053,856 Lebanese and foreign students in schools, of which 36% are in public schools and 64% are in private schools. In addition to the Arabic language, 43% of schools use French as the foreign language, 34% use English and 23% use both languages. The top private schools teaching the American curriculum are American Community School (ACS), International College (IC), Adma International School, the International School of Choueifat, Sagesse High School.
SUB-SECTORS

In terms of mobility, Lebanon had 1,700 Lebanese students studying in the United States for the academic year 2020-2021 according to the IIE Open Doors Report. The report provides the following segmentation:

**Undergraduate**

499 students enrolled in undergraduate education in 2020-2021 academic year, an increase of 0.8% from the previous year.

**Graduate**

843 students enrolled in graduate education in 2020-2021 academic year, an increase of 5.6% from the previous year.

**Non-Degree Studies**

30 students enrolled in non-degree programs in 2020-2021 academic year, a decrease of 50.8% from the previous year.

**Optional Practical Training (OPT)**

328 students enrolled in OPT programs in 2020-2021 academic year, a decrease of 7.6% from the previous year.

AMIDEAST is a leading American nonprofit organization engaged in international education, training, and development activities in the Middle East and North Africa. AMIDEAST supports over 33,000 students each year to pursue their higher education and professional growth in the U.S.

**OPPORTUNITIES**

Education in the United States is highly valued in Lebanon. Many students studied in the United States despite the ongoing Lebanese economic crisis. The crisis started in 2019 and led to the devaluation of more than 90 percent of the local currency on the secondary exchange markets, leading the financial sector to impose ad hoc capital controls, preventing most Lebanese from transferring any money overseas or withdrawing dollars from their bank accounts. As such, studying in the United States became a major challenge to Lebanese students. However, Lebanon has 18,630 students studying abroad according to UNESCO, as they are looking for better opportunities and career advancement.

**DIGITAL MARKETING STRATEGIES**

In Lebanon, students visit schools’ and universities’ admission centers to search for information on the school, university, accreditation, and all related subjects. Nowadays, Lebanese students seek information via Google. Therefore, it is important to make sure content on
educational opportunities is up-to-date and the Search Engine Optimization (SEO) strategy is strong. Students looking for job opportunities use these online platforms: Monster, Bayt, Jobs for Lebanon, LinkedIn and Facebook. Additionally, many students attended job fairs in Lebanon to submit their curriculum vitae for the appropriate opportunities in the local and international market, but this trend has stopped due to the Covid-19 pandemic, as well as the Lebanese crisis.

EVENTS

The U.S. Embassy in Lebanon places significant emphasis on the promotion of U.S. education and training institutions with the Cultural Affairs Office (CAO), Middle East Partnership Initiative (MEPI), as well as the United States Agency for International Development (USAID). Another effective way to promote U.S. education is via the services that U.S. Commercial Service offers such as Gold Key Service, International Partner Search. And finally, to participate in local education fairs such as EDEX and Promofair.

RESOURCES

- U.S. Commercial Service – Lebanon: https://www.trade.gov/lebanon
- 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
- U.S. Embassy in Lebanon – Cultural Affairs Office: https://lb.usembassy.gov/education-culture/
- U.S. Embassy in Lebanon - Middle East Partnership Initiative: https://lb.usembassy.gov/embassy/beirut/sections-offices/mepi/
- Amideast: https://www.amideast.org/lebanon

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UNESCO Student Mobility Number
Malaysia has 59,144 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 2019-2020 school year, Malaysia had 6,910 students studying in the U.S. For the 2020-2021 school year, the number of Malaysian students studying in the U.S. was 5,280, a decrease of 23.6 percent. The steep decline in the number of students was due to the Covid-19 pandemic and travel restrictions that have been imposed by Malaysia.

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 scholarships 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.
### International Education Overview

<table>
<thead>
<tr>
<th>Sub-sector</th>
<th>2018/19</th>
<th>2019/20</th>
<th>2020/21</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Malaysian Students in U.S.</td>
<td>7,709</td>
<td>6,910</td>
<td>5,280</td>
</tr>
<tr>
<td>Percentage Change from Previous Year (%)</td>
<td>-6.8</td>
<td>-10.4</td>
<td>-23.6</td>
</tr>
</tbody>
</table>

*Source: IIE Open Doors Report*

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

- Engineering
- Business and Management
- Mathematics and Computer Sciences
- Social Sciences
- Physical and Life Sciences

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

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.

### Academic

<table>
<thead>
<tr>
<th>Sub-sector</th>
<th>2018/19</th>
<th>2019/20</th>
<th>2020/21</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>5,104</td>
<td>4,333</td>
<td>2,996</td>
</tr>
<tr>
<td>Percentage of Change from Previous Year (%)</td>
<td>-12.3</td>
<td>-15.1</td>
<td>-30.9</td>
</tr>
<tr>
<td>Graduate</td>
<td>1,061</td>
<td>1,069</td>
<td>995</td>
</tr>
<tr>
<td>Percentage of Change from Previous Year (%)</td>
<td>-4.9</td>
<td>0.8</td>
<td>-6.9</td>
</tr>
<tr>
<td>Non-Degree</td>
<td>153</td>
<td>110</td>
<td>44</td>
</tr>
<tr>
<td>Percentage of Change from Previous Year (%)</td>
<td>33.0</td>
<td>-28.1</td>
<td>-60.0</td>
</tr>
<tr>
<td>OPT</td>
<td>1,391</td>
<td>1,398</td>
<td>1,245</td>
</tr>
<tr>
<td>Percentage of Change from Previous Year (%)</td>
<td>13.7</td>
<td>0.5</td>
<td>-10.9</td>
</tr>
</tbody>
</table>

*Source: IIE Open Doors Report*
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. As of January 2020, there were 26 million social media users and 40.7 million mobile connections in Malaysia.

Due to the Covid-19 pandemic, more than 240,000 schools in Malaysia are closed, affecting most students. 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 in order to sit for their major exams are taught on the platform. All lessons are in compliance 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 looked into.

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

EVENTS

- Smart Education Expo- Sept 27-29, 2022: http://www.smarteducationexpo.com/

RESOURCES

- U.S. Commercial Service Malaysia: https://trade.gov/malaysia
- U.S. Commercial Service Global Education Team: https://trade.gov/education-industry
- Industry and Analysis, Office of Supply Chain, Professional & Business Services: https://www.trade.gov/professional-and-business-services
- Department of Statistics Malaysia: https://www.dosm.gov.my/v1/
- EducationUSA: https://www.macee.org.my/educationusa-malaysia/

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UNESCO Student Mobility Number:
Mexico has 34,319 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 2020-2021 academic year, 12,986 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.

<table>
<thead>
<tr>
<th>Academic Level</th>
<th>Number of Students</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>7,303</td>
<td>56.2%</td>
</tr>
<tr>
<td>Graduate</td>
<td>3,788</td>
<td>29.2%</td>
</tr>
<tr>
<td>Other / Non-Degree</td>
<td>358</td>
<td>2.8%</td>
</tr>
<tr>
<td>Optional Practical Training</td>
<td>1,537</td>
<td>11.8%</td>
</tr>
</tbody>
</table>

Source: IIE Open Doors 2021

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 in order 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, registration for faculty to participate is open until fall 2022 at AMPEI’s website (https://ampei.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 2020-2021 academic year, 12,986 Mexican students enrolled in U.S. higher education institutions, representing a 9.5 percent decrease from the previous year, mainly due to Covid-19 travel restrictions. 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 2021 statistics, 7,303 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 with 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. For the 2022 academic period, schools are expected to offer in-person, and in some cases hybrid, education models to support student development. 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 92 million Internet users in Mexico in 2020, representing 71% of the Mexican population. 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 32 million users over 13 years of age.

RESOURCES

• U.S. Commercial Service – Mexico: https://www.trade.gov/mexico
• 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
• Mexican Secretariat of Public Education (SEP): https://www.gob.mx/sep
• National Association of Universities and Higher Learning Institutions: https://www.anuies.mx
• U.S. Embassy Education and English Programs: https://mx.usembassy.gov/education/
• COMEXUS – Fulbright-Garcia Robles scholarships: https://www.comexus.org.mx/
• 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://ampei.org.mx/

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UNESCO Student Mobility Number:  
Morocco has 56,730 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.

Student's 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 (54.5%), 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's and MBAs. There is also increasing interest in technologies and engineering programs (STEM).

### Moroccan Students Studying in the U.S.

<table>
<thead>
<tr>
<th>Year</th>
<th>Count</th>
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<tbody>
<tr>
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<tr>
<td>2015</td>
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</tr>
<tr>
<td>2020</td>
<td>1,499</td>
</tr>
</tbody>
</table>

*Source: 2020 Open Doors Report (published by IIE, funded by the U.S. Department of State)*

In 2020/21, there were 1,294 international students from Morocco at U.S. higher education institutions. A -13.7% 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 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 2022

RESOURCES

- U.S. Commercial Service – Morocco: https://www.trade.gov/morocco
- U.S. Commercial Service Global Education Team: http://www.trade.gov/education-industry
- Industry and Analysis, Office of Supply Chain, Professional & Business Services: http://www.trade.gov/professional-and-business-services
- 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
- Rabat Website - https://educationusa.state.gov/centers/amideast-rabat
  - Email: rabat@educationusa.org

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THE NETHERLANDS

Capital: Amsterdam
Population: 17.3 million (July 2021 est.)
GDP (Purchasing Power Parity): $945.5 billion (2020 est., in 2017 dollars)
Currency: Euro
Language: Dutch

UNESCO Student Mobility Number:
The Netherlands has 20,011 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 112 countries and Dutch students consequently are likely to see the U.S. as a prime study destination.

The number of Dutch students studying in higher education institutions in the U.S. dropped drastically in the 2020-2021 academic year, totaling just 1,767 students.

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 2021 Open Doors Report on International Educational Exchange, there were 1,767 students from the Netherlands studying in the higher education sector in the U.S. during the 2020-2021 academic year, a decrease of 35 percent compared with the previous year when the number was 2,727. This is a drastic drop compared to the steady growth in numbers beginning in 2012 when the number was 2,000 and can be attributed exclusively to the pandemic.

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 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

Demand for secondary education is high – the enrollment rate is 92 percent, and 2019 enrollment was 270,000, spread equally between male and female students. A total of 1.2 million 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 2.2 percent in 2018, 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**

See https://www.educationfair.nl/events/education-fairs-netherlands/

**RESOURCES**

- U.S. Commercial Service- Netherlands: https://www.trade.gov/netherlands
- U.S. Commercial Service Global Education Team: http://www.trade.gov/education-industry
- Industry and Analysis, Office of Supply Chain, Professional & Business Services: https://www.trade.gov/professional-and-business-services
- Fulbright Center: https://fulbright.nl/en/

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NEW ZEALAND

Capital: Wellington
Population: 5 million (July 2021 est.)
GDP (Purchasing Power Parity): $215.6 billion (2020 est., in 2017 dollars)
Currency: New Zealand Dollar (NZD)
Language: English (de facto official), Māori (de jure official)

UNESCO Student Mobility Number
New Zealand has 5,206 students studying abroad according to UNESCO.

CIA World Factbook
32.55% of New Zealand's population is under 25 years of age.

OVERVIEW

The United States recently surpassed Australia in 2019 to become the most popular study destination for New Zealand students. During the 2020/21 academic year, 1,520 New Zealand students chose to study in the United States – a decrease of 18% from the previous year. Most of this decrease is attributed to the global pandemic and numbers in the 2021/22 year are expected to increase. 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 2020/21 academic year, 58% of New Zealand students in the U.S. were at the undergraduate level, 25% at the graduate level, 16% were on Optional Practical Training (OPT), and the remaining 1% 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 400 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, rowing, running, 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, in order 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 and Australia are currently participating in a pilot program that allows exchange visitors from the respecting countries to have the opportunity to gain international cultural exposure and a work and travel experience for up to twelve months in the United States, and U.S. participants have the opportunity to work and travel in either Australia or New Zealand. The program provides a work and travel experience to qualified applicants who may not otherwise have such cultural exchange opportunities.

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

There are currently no local scholarship programs available for students to study overseas.
Best Prospects

High School, Undergraduate and OPT & Online Degrees

Best Student Recruitment Methods

Institutional, student outreach and online outreach

EVENTS

EducationUSA New Zealand Events: https://www.facebook.com/educationusanz/events/

RESOURCES

- U.S. Commercial Service New Zealand: https://www.trade.gov/new-zealand
- U.S. Commercial Service Global Education Team: http://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 centers in New Zealand: https://nz.usembassy.gov/education/educational-advising/
- New Zealand Qualifications Authority: https://www.nzqa.govt.nz

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UNESCO Student Mobility Number:
Nigeria has 71,133 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 $2,097.09 in 2020, with inflation at 15.99% (Oct. 2021).

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 71,133 Nigerian students studying abroad, 12,860 are studying in the U.S., which represents a 6.6% decrease in enrollment numbers from the previous academic year.
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, 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), Nigeria’s Higher Education (university) regulator. The country also has 12 approved distance learning centers.

**SUB-SECTORS**

**Top Areas of Study for Nigerian Students**

<table>
<thead>
<tr>
<th>Major Field of Specialization</th>
<th>2020/2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business and Management</td>
<td>9.7%</td>
</tr>
<tr>
<td>Education</td>
<td>0.7%</td>
</tr>
<tr>
<td>Engineering</td>
<td>19.0%</td>
</tr>
<tr>
<td>Fine and Applied Arts</td>
<td>1.2%</td>
</tr>
</tbody>
</table>
## Major Field of Specialization

<table>
<thead>
<tr>
<th>Field of Specialization</th>
<th>2020/2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Professions</td>
<td>6.2%</td>
</tr>
<tr>
<td>Humanities</td>
<td>0.9%</td>
</tr>
<tr>
<td>Intensive English</td>
<td>0.1%</td>
</tr>
<tr>
<td>Math/Computer Science</td>
<td>29.4%</td>
</tr>
<tr>
<td>Physical and Life Sciences</td>
<td>21.9%</td>
</tr>
<tr>
<td>Social Sciences</td>
<td>4.7%</td>
</tr>
<tr>
<td>Other Fields of Study</td>
<td>5.5%</td>
</tr>
<tr>
<td>Undeclared</td>
<td>0.8%</td>
</tr>
</tbody>
</table>

*Table 2: Percentage of students in different fields of specialization. (Source: [https://opendoorsdata.org/data/international-students/fields-of-study-by-place-of-origin/](https://opendoorsdata.org/data/international-students/fields-of-study-by-place-of-origin/))*

## 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.

<table>
<thead>
<tr>
<th>Academic Level</th>
<th>Number of Students</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>4,827</td>
<td>-10.3%</td>
</tr>
<tr>
<td>Graduate</td>
<td>5,350</td>
<td>-3.9%</td>
</tr>
<tr>
<td>Non-Degree</td>
<td>224</td>
<td>-3.9%</td>
</tr>
<tr>
<td>Opt</td>
<td>2,459</td>
<td>-4.8%</td>
</tr>
</tbody>
</table>

*Table 1: Levels of study vs no. of students (Source: [https://opendoorsdata.org/data/international-students/academic-level-and-places-of-origin/](https://opendoorsdata.org/data/international-students/academic-level-and-places-of-origin/))*

## 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
• 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
• EducationUSA
  • Abuja: Folashade Adebayo – Education Advising Supervisor – AdebayoSX@state.gov +234-9-4614241
  • Lagos: Chinenye Uwadileke – EducationUSA Adviser – 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 or CulturalLagos@state.gov

U.S. COMMERCIAL SERVICE CONTACT

Chidinma Akaniro, Commercial Assistant
U.S. Commercial Service – Lagos, Nigeria
Phone: +234 1 460 3826
Email: Chidinma.Akanire@trade.gov
UNESCO Student Mobility Numbers

<table>
<thead>
<tr>
<th>UNESCO</th>
<th>Denmark</th>
<th>Finland</th>
<th>Norway</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number of mobile students abroad¹</td>
<td>5,817</td>
<td>11,364</td>
<td>16,883</td>
<td>14,412</td>
</tr>
<tr>
<td>Percent of population under 24 years of age²</td>
<td>28.8%</td>
<td>27.4%</td>
<td>30.0%</td>
<td>28.5%</td>
</tr>
<tr>
<td>Total population³</td>
<td>5,894,687</td>
<td>5,587,442</td>
<td>5,509,591</td>
<td>10,261,767</td>
</tr>
</tbody>
</table>

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 2020 report, 7,000 Nordic students studied in the United States in academic year 2019/20, a 7% decrease compared to the prior year⁴. Despite the decline, Nordic students contributed $297 million to the U.S. economy in 2019.

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. All Nordic countries rate around or above the OECD average of performance in reading, mathematics, and science (PISA, 2018), and according to the Shanghai Ranking (2021), there are seven Nordic universities among the world’s top 100. 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.

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/eli/reg/2016/679/oj)

**SUB-SECTORS**

In the academic year 2019/2020, 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 2018/2019, 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, the largest percentage decrease last year was at the graduate level. 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 now presumed to participate in international studies, unless they make an active choice to opt out of an exchange period abroad. Financial aid and the structure of support will also be impacted by the recent White Paper, however per today the changes are unclear.

In the academic year 2018/19, 23,600 Swedish students studied abroad, a decrease for the fourth consecutive academic year. Of these, 16.8% or 3,960 studied in the United States (-6.4%), of which 700 were exchange students and 3,270 were free movers. The decrease in Swedish students studying abroad is in part due to shifting demographics, with smaller cohorts graduating from high school in 2019, and in part due to the unfavorable exchange rate.

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**

Denmark had a total of 230,559 domestic students in reporting year 2020.

<table>
<thead>
<tr>
<th>Academic Level</th>
<th>2019/2020</th>
<th>2020/2021</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>421</td>
<td>363</td>
<td>-13.8</td>
</tr>
<tr>
<td>Graduate</td>
<td>184</td>
<td>160</td>
<td>-13.0</td>
</tr>
<tr>
<td>Non-Degree</td>
<td>584</td>
<td>26</td>
<td>-95.5</td>
</tr>
<tr>
<td>OPT</td>
<td>75</td>
<td>59</td>
<td>-21.3</td>
</tr>
</tbody>
</table>

(Number of students reduced significantly due to the COVID-19 pandemic)
Finland

Finland had a total of 260,983 domestic students in reporting year 2019 (latest available information).

<table>
<thead>
<tr>
<th>Academic Level</th>
<th>2019/2020</th>
<th>2020/2021</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>373</td>
<td>293</td>
<td>-21.4</td>
</tr>
<tr>
<td>Graduate</td>
<td>117</td>
<td>106</td>
<td>-9.4</td>
</tr>
<tr>
<td>Non-Degree</td>
<td>128</td>
<td>10</td>
<td>-92.2</td>
</tr>
<tr>
<td>OPT</td>
<td>72</td>
<td>76</td>
<td>5.6</td>
</tr>
</tbody>
</table>

(Number of students reduced significantly due to the COVID-19 pandemic)

Norway

Norway had a total of 254,179 domestic students in reporting year 2019 (latest available information).

<table>
<thead>
<tr>
<th>Academic Level</th>
<th>2019/2020</th>
<th>2020/2021</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>388</td>
<td>373</td>
<td>-3.90</td>
</tr>
<tr>
<td>Graduate</td>
<td>138</td>
<td>117</td>
<td>-15.20</td>
</tr>
<tr>
<td>Non-Degree</td>
<td>129</td>
<td>128</td>
<td>-0.80</td>
</tr>
<tr>
<td>OPT</td>
<td>61</td>
<td>72</td>
<td>18.00</td>
</tr>
</tbody>
</table>

(Number of students reduced significantly due to the COVID-19 pandemic)

Sweden

Sweden had a total of 321,339 domestic students in reporting year 2020.

<table>
<thead>
<tr>
<th>Academic Level</th>
<th>2019/2020</th>
<th>2020/2021</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>1,963</td>
<td>1,401</td>
<td>-28.6</td>
</tr>
<tr>
<td>Graduate</td>
<td>318</td>
<td>267</td>
<td>-16.0</td>
</tr>
<tr>
<td>Non-Degree</td>
<td>557</td>
<td>69</td>
<td>-87.6</td>
</tr>
<tr>
<td>OPT</td>
<td>375</td>
<td>308</td>
<td>-17.9</td>
</tr>
</tbody>
</table>

(Number of students reduced significantly due to the COVID-19 pandemic)
### Totals

<table>
<thead>
<tr>
<th>Academic Level</th>
<th>2019/2020</th>
<th>2020/2021</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>3,901</td>
<td>2,964</td>
<td>-24.0%</td>
</tr>
<tr>
<td>Graduate</td>
<td>878</td>
<td>748</td>
<td>-14.8%</td>
</tr>
<tr>
<td>Non-Degree</td>
<td>1,596</td>
<td>117</td>
<td>-92.7%</td>
</tr>
<tr>
<td>OPT</td>
<td>678</td>
<td>574</td>
<td>-15.3%</td>
</tr>
<tr>
<td>Total</td>
<td>7,053</td>
<td>4,403</td>
<td>-37.6%</td>
</tr>
</tbody>
</table>

*Number of students reduced significantly due to the COVID-19 pandemic*

### Undergraduate

Most Nordic students studying in the United States do so at the undergraduate level, with the exception of Denmark.

While Associate Degree courses are popular, there is no Nordic equivalent to the U.S. Associate Degree. When students return to their home countries, not all U.S. credits are approved for further studies in the Nordics. Therefore, a non-trade Associate Degree is a less interesting option for a Nordic student, unless they intend to pursue higher education where credit is recognized.

### 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. In 2017, 1,200 Swedish students studied at community colleges in the United States. According to a 2018 report by the Swedish Board of Student Finance (CSN), 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 slightly in the academic year 2019/2020 as compared to 2018/2019. 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, and 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 (LMSs). Examples of such include Google Classroom, Canvas, Moodle, 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 LMSs. In addition to the LMS platforms common to the Nordics, examples include: 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 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. 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.
The Nordic countries consistently rank in the top 10 in EF's English Language Proficiency Rankings. In 2021, Denmark, Finland, Sweden, and Norway occupied the second, third, fourth, and fifth spot rankings, respectively. Because of their 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 2018/19, only 15% 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.

**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 and Microsoft Teams are the online communication platforms of choice among Nordic schools and universities. Nordic students most frequently stream videos from YouTube and Netflix. Spotify is commonly used to stream music, and in Finland, WhatsApp is a common messaging platform among students. 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, guidance counselors in their high schools, 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
Webinars approximately biweekly (no in-person events due to COVID-19)
https://edu-danmark.dk/edu-days

Finland
Educa Helsinki: Trade fair for education and training sector
Helsinki (online event), 27-28 January 2023
https://educa.messukeskus.com/?lang=en

Studia: Finland’s largest youth study and career event
Helsinki, 23–24 November 2022
https://studia.messukeskus.com/?lang=en

Norway
Ta Utdanning 2022
https://www.tautdanning.no/english-digital/

Sweden
Gymnasiemässan
This is Sweden’s largest high school fair. 2022 dates have not been set yet, but are generally in November.

Saco Student Fair
This is Sweden’s largest event for post-secondary education. 2021 dates have not been set yet but are generally in late November-early December in Stockholm and Malmö. In 2020 this fair was virtual.

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
• The Danish Accreditation Institution: https://akkr.dk/en/
Finland
- U.S. Commercial Service - Finland: https://www.trade.gov/Finland
- Fulbright Finland Foundation: https://www.fullbright.fi
- 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
- Norway America Association (NORAM): https://noram.no/en
- Norwegian State Educational Loan Fund (Lånekassen): https://lanekassen.no
- StudentTorget: https://studenttorget.no

Sweden
- U.S. Commercial Service - Sweden: https://www.trade.gov/Sweden
- Fulbright Commission: https://www.fullbright.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/

Other
- U.S. Commercial Service: https://www.trade.gov
- U.S. 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
- EducationUSA: https://educationusa.state.gov
- EducationUSA – Student Mobility Fact Sheets: https://educationusa.state.gov/us-higher-education-professionals/recruitment-resources/student-mobility-fact-sheets
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1 UNESCO Student Mobility number
2 CIA World Factbook
3 CIA World Factbook
4 BEA, Table 2.3. U.S. Trade in Services
5 Swedish Higher Education Authority, 2020 Annual Report
6 Open Doors, Research & Insights and Open Doors, Places of Origin
7 Open Doors, Places of Origin
8 Open Doors, Places of Origin
9 Open Doors, Research & Insights and Open Doors, Places of Origin
PAKISTAN

Capital: Islamabad
Population: 238.2 million (July 2021 est.)
GDP (Purchasing Power Parity): $1.021 trillion (2020 est.)
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 59,784 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 raise it, the literacy rate in Pakistan has remained steady at approximately 60 percent since 2014-2015, with a 74 percent literacy rate in urban areas and 52 percent in rural areas.

The government’s 2020-2021 Pakistan Economic Survey estimates that from 2019-2020, there were 13.5 million students enrolled in pre-primary education, 24.6 million in primary education (grades 1-5), approximately 7.7 million in middle education (grade 6-8), 4.1 million in secondary education (grade 9-10), and 1.8 million in higher-secondary education (grade 11-12). The survey further indicates there were approximately 450,000 students enrolled in technical and vocational education, approximately 600,000 in degree-awarding colleges, and 1.9 million students in universities in 2019-2020.

Pakistan has about 187,000 primary schools, 48,300 middle schools, 32,000 secondary schools, and 6,100 higher/secondary/intermediate colleges in the country. Pakistan has over 200 universities and 1,600 degree-awarding 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 of the 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 (http://ibacc.edu.pk/) 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's degree program which, essentially, consisted of the provincial government converting about 800 existing colleges into Associate's degree-awarding schools. However, only five of these recently converted institutes actually offer its students associate's degrees. The Punjab government indicates that it expects the remaining colleges will be prepared and able to offer associate's degrees within the next year.

Degree Awarding Institutions/Universities in Pakistan

Pakistan has 141 public and 91 private universities/institutions accredited by the Higher Education Commission (HEC) of Pakistan. Almost all major disciplines are taught at these institutions/universities.

Technical & Vocational Education and Training (TVET)


Skill Development

The Government of Pakistan established the Skill Development Council Islamabad (http://sdc.com.pk), Skill Development Council Lahore (https://www.sdclahore.gov.pk), Skill Development Council Karachi (https://sdckarachi.org.pk/), and Skill Development Council Peshawar. These Councils function under the National Training Board as public-private partnerships. Their partnered training institutes offer regular training programs as well corporate training program in various domains.

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://nicpakistani.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.durshal.com/) 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 2021-2022 totaled PKR 92 billion (approx. $541 million), of which PKR 78.2 billion (approx. $460 million) was allocated for Tertiary Education Affairs and Services. The Higher Education Commission received PKR 42.4 billion (approx. $250 million), a 44 percent increase over the previous year.

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**

Like in much of the world, the Covid-19 pandemic forced the closure of schools in Pakistan, with students home schooling from March 2020 until July 2021. During this period, schools opened only for a few days and most of the time home schooling was implemented. Per UNESCO statistics, nearly 60,000 Pakistani students are currently studying abroad. There are 7,475 Pakistani students studying in the United States (2020-2021), as reported in the latest Open Doors Report. While this figure reflects a 5.8 percent decline from the previous year, several other countries saw double-digit declines. Pakistan ranks 18th in terms of the number international students in the United States during the 2020-2021 academic year, 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 and technology, medicine, general studies, and the arts.

The U.S. states with the highest number of Pakistani students are: Texas, New York, Massachusetts, Illinois, and California.

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, Turkey, Saudi Arabia, Italy, and China.

**SUB-SECTORS**

Open Doors Statistics for the 2020-2021 academic year:
- 2,858 students are enrolled in *Graduate programs*, a decline of 2.5 percent from the previous year.
- 3,044 students are enrolled in *Undergraduate programs*, a decline of 7.6 percent from the previous year.
- 101 students are enrolled in *Non-degree programs*, a decline of 62.9 percent from the previous year.
- 1,472 students are enrolled in *Optional Practical Training (OPT)* programs, a 2.2 percent increase over 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.

Types of 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 approximately 150 Fulbright scholarships in 2022. 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.

**DIGITAL MARKETING STRATEGIES**

Pakistani students rely heavily on social media as part of the decision-making process when exploring 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, with other search engines (Bing, Yahoo, etc.) trailing. 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://www.usefp.org/)
- 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/](https://educationexpo.dawn.com/)
- The News Education Expo -- [https://www.facebook.com/thenewseducationexpo/](https://www.facebook.com/thenewseducationexpo/)
RESOURCES

- U.S. Commercial Service – Pakistan: https://www.trade.gov/pakistan
- U.S. 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
- Open Doors: https://opendoorsdata.org/
- USEFP: https://usefp.org/

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UNESCO Student Mobility Number
Panama has 3,647 students studying abroad according to UNESCO.

CIA World Factbook
42.15% of the population in Panama is under 25 years old.

OVERVIEW

As Panama continues on the road to economic recovery, improving education has become key to ensuring sustainable economic growth, particularly after the post-Covid situation. The country’s ability to acquire the level of skills needed to compete in a changing global economy with increasingly complex demands depends on education. In the context of competing for jobs, and raising workers’ employability, strengthening synergies between educational offerings and the labor market will prove crucial to growing productivity and ensuring sustainable growth.

Panama’s education sector is comprised of 895,000 (est. 2021) students. Of those, 750,000 attend public schools and an estimated 145,000 students attend private schools (2021). The total number of 12th graders for the 2019-2020 school year was 43,466. The 10,000 high school seniors in 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 18,000 new students enter the University of Panama (government subsidized university).

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 1,659 for the 2020-2021 academic year, which is a 2.9% decrease 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 (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 (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. The EducationUSA contact in Panama is Gladys Bernett gbernett@educationusa.org.

DIGITAL MARKETING STRATEGIES

Panama’s total population is 3.9 million people, with a total of 4.86 million cellular phone lines,
representing over 114% of the population. This means that 652,000 Panamanians own more than one cell phone. The total number of Internet users is 2.63 million (62% of the population) of which 2.40 million are active users of social networking sites.

The preferred Internet platform of students in Panama is Google. The most popular social media site used by students is Instagram with 1.60 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 675,900 users registered in Panama, accounting for 15.6% 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 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

Capital: Lima
Population: 32.2 million (July 2021 est.)
GDP (Purchasing Power Parity): $371.29 billion (2020 est., in 2017 dollars)
Currency: Nuevo Sol (PEN)
Language: Spanish (official) 82.9%, Quechua (official) 13.6%, Aymara (official) 1.6%

UNESCO Student Mobility Number:
Peru has 33,837 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 made progress in education over the past 10 years. In Peru, there are over eight million school children and 1.2 million university students. The level of enrollment has increased substantially over the years and access to initial education has reached 70% of the total K-12 age population. But, at the same time, Peru has the challenge of improving educational quality. The country reached the anniversary of its 200th year of independence 2021, with a learning poverty rate of 56% - meaning that 56% of students at the age of ten cannot adequately read or understand simple text.

There is also the issue of inequality, since a student's place of birth and socioeconomic status in large part defines the educational possibilities in Peru. Naturally, those located in the isolated or rural areas outside the main population centers suffer the most from this phenomenon.

Covid Impact: According to the World Economic Forum, Peru ranked 27th in quality of the educational system for 2020 compared to 24th in 2019. Covid presented the largest shock to Peru’s educational system in the last 100 years. Economically, the abilities of the state and families to invest in education have been reduced. There was also the halting of in-person classes, forcing the entire student population to learn from home – a location where many did not even have the technological capabilities in the form of computers or Internet connectivity to effectively learn.

According to a study carried out by Peru’s National Institute of Statistics, in 2020, Internet accessibility in metropolitan Lima was 72% while in the rest of the country it was 43%, of which the most affected is the primary school sector with 30% accessibility. Across the board, this interruption has had a noticeable negative impact on children's learning progress, mental health, and socialization.

According to the Ministry of Education (MINEDU), in 2020, approximately 350,000 students moved from private to public schools, most of them being K-12 students. Another worrying trend according MINEDU is that in 2020 there was an increase in school dropouts from 1.3% to 3.5% at the pre-school and primary school levels.
Public Spending on Education in Peru

Public spending on education decreased by about one percent in 2020 to about $8.5 billion USD, representing 16% of total public spending or 4.25% of GDP. In 2020, Peru was ranked 48th in the world with regards to the amount invested in education per year, decreasing two spots from its 46th position in 2019. In gross numbers, Peru spends $1,000 per student on basic education. In contrast, an OECD country spends approximately $7,000 per student.

SUB-SECTORS

Higher Education

According to the IIE Open Doors 2021 Report, the number of Peruvian students in the U.S. increased by .3% with 3,556 students. After a difficult situation due to the pandemic, a main pillar in 2021 was the continued offering of courses online. Institutes took the opportunity to expand their course catalog. The new courses focus on the skills demanded due to the pandemic, such as data analysis, digital transformation, and digital marketing. The trend has been to offer courses on how to sell products online. There are also six-month creative marketing programs and others related to e-commerce. In addition, courses on digital marketing and human talent management have been launched, focusing on any sector.

Private universities in Peru have begun to invest in technology and infrastructure to adapt their campuses to the new “hybrid” format, which is a mix between virtual and in-person classes, with investments in IT and infrastructure expansion.

Secondary Education

Peru has eight million students between the ages of 5-16 years. Many of Peru's students come from the middle class, with families seeking education that is affordable and practical. Public schools in Peru are 100% managed by the MINEDU, whereas private schools are managed independently but under directives from MINEDU. Public schools in Peru are free, whereas private schools have different rates depending on the infrastructure, prestige, and quality of teachers.

The role of the private sector in schools in Peru has been key for the revitalization of education. Private schools have diligently met the growing need for quality education at an increasingly affordable level. For example, the chain of schools Futura Schools and Innova Schools operate in more than ten provinces of Peru, providing better educational quality in the current health emergency environment, with almost two years utilizing remote education. Private schools in Peru have provided better infrastructure and teaching, training, and assessment methods. The process of continuous improvement of private schools has generated skills in the market in order to provide comprehensive education in various parts of Peru.

According to a report by Apoyo Consultoría published in 2021, private regular basic education schools reach 83% of Peruvian provinces. On the other hand, the report shows that compared to public schools, private schools are characterized by having more qualified teachers, fewer students per teacher, more educational activities, and better infrastructure.
In this way, private schools perform better than public ones with respect to academic performance and dropout rates. One of the challenges for private schools is to find trained staff that is integrated into a competitive pedagogical model. This is why there are many training opportunities for college teachers.

**OPPORTUNITIES**

The private sector 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. Their goal is to expand geographical reach within Peru.

Universities in Peru are now focused on the digital aspect to improve their capacity to provide better services to students in a blended at-home and in-class environment. Universities are not only working on the implementation of new laboratories, workshops, and academic software, but also in increasing classrooms as a result of restricted capacity. 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 pedagogy methods through special platforms and instructional learning design. Foreign universities, such as la Universidad de Tarapacá from Chile and the Instituto Tecnologico 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 Team at the U.S. Embassy has been working diligently to introduce potential U.S. sub-contractors to the United Kingdom 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 investigation and research of information. 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. The general recommendation for U.S. study state consortia and/or education institutions to build digital outreach is through LinkedIn and Facebook.

**EVENTS**

- International Congress of Educators 2022 (Virtual)- February 15 – 17, 2022: https://congresodeeducadores.upc.edu.pe/
- National Science and Technology School Fair- Date TBD: http://eureka.concytec.gob.pe/
RESOURCES

• U.S. Commercial Service – Peru: https://www.trade.gov/peru
• U.S. and 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
• Peruvian Ministry of Education: https://www.gob.pe/minedu
• Regional Education Center of Lima: http://www.drelm.gob.pe/drelm/
• Institute of International Education: https://www.iie.org/opendoors
• 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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UNESCO Student Mobility Number
The Philippines has 18,859 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 for the 2020-2021 academic year, including 1,510 pursuing undergraduate degrees, 856 seeking graduate degrees, 480 pursuing Optional Practical Training (OPT), and 61 in other 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. There were three virtual EducationUSA fairs in 2021:

- EducationUSA Virtual Graduate School Fair, August 27, 2021
- EducationUSA Virtual Mini-Fair, June 24, 2021
- EducationUSA Virtual Community College Fair, February 23, 2021

To see EducationUSA’s scheduled virtual programs, please visit:
- https://ph.usembassy.gov/education-culture/educationusa/
- https://www.facebook.com/educationusa.philippines

RESOURCES

- U.S. Commercial Service - Philippines: https://www.trade.gov/philippines
- 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
- 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-culture/educationusa/

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OVERVIEW

Before the COVID-19 pandemic, Poland enjoyed consistent and uninterrupted economic growth for more than 20 years. Poland’s GDP per capita, a major factor indicating the country’s purchasing power, reached $33,844 in 2019, representing 72 percent of the EU average. Public expenditures for education currently amount to 4.6% of Poland’s GDP, 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% of 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 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. A majority of 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 2021 Open Doors Report, in the 2020/2021 academic year there were 1,328 Polish students studying in the U.S., a 12.2% decrease over the previous year. This change is reflected by an 82.35% decrease in the J category and a 54.09% decrease in F category visas issued in Poland. The top five destination states are New York, California, Massachusetts, Florida, and Pennsylvania.

![Polish Students Studying in the U.S.](image)

<table>
<thead>
<tr>
<th>Students in the U.S. by U.S. Institution Type</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associate's (2-year) Colleges</td>
<td>9.54%</td>
</tr>
<tr>
<td>Baccalaureate (4-year) Colleges</td>
<td>6.03%</td>
</tr>
<tr>
<td>Doctorate-granting Universities</td>
<td>66.53%</td>
</tr>
<tr>
<td>Master's Colleges and Universities</td>
<td>13.97%</td>
</tr>
<tr>
<td>Special Focus Institutions</td>
<td>3.93%</td>
</tr>
<tr>
<td>Public Institutions</td>
<td>52.89%</td>
</tr>
<tr>
<td>Private Institutions</td>
<td>47.11%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sector</th>
<th>%</th>
<th>Number</th>
<th>% Year-to-year Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>49.4</td>
<td>656</td>
<td>-8.5%</td>
</tr>
<tr>
<td>Graduate</td>
<td>33.4</td>
<td>444</td>
<td>1.6%</td>
</tr>
<tr>
<td>Non-Degree</td>
<td>3.3</td>
<td>44</td>
<td>-72%</td>
</tr>
<tr>
<td>OPT</td>
<td>13.9</td>
<td>184</td>
<td>-8.9%</td>
</tr>
</tbody>
</table>

Source: 2021 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**

<table>
<thead>
<tr>
<th>Best Prospects</th>
</tr>
</thead>
<tbody>
<tr>
<td>High School</td>
</tr>
<tr>
<td>Boarding Schools</td>
</tr>
<tr>
<td>Community College</td>
</tr>
<tr>
<td>Undergraduate</td>
</tr>
<tr>
<td>Graduate</td>
</tr>
<tr>
<td>Law School</td>
</tr>
<tr>
<td>OPT</td>
</tr>
<tr>
<td>ESL</td>
</tr>
<tr>
<td>Online Degree</td>
</tr>
<tr>
<td>Summer/Certificate Programs</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Best Student Recruitment Methods</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education Agents</td>
</tr>
<tr>
<td>Institutional</td>
</tr>
<tr>
<td>Student Outreach</td>
</tr>
<tr>
<td>Online Outreach</td>
</tr>
</tbody>
</table>

**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**

- 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](https://www.trade.gov/poland)
- U.S. Commercial Service Global Education Team: [https://www.trade.gov/education-industry](https://www.trade.gov/education-industry)
- Ministry of Education and Science: [https://www.gov.pl/web/edukacja-i-nauka](https://www.gov.pl/web/edukacja-i-nauka)
- Polish-U.S. Fulbright Commission: [https://en.fulbright.edu.pl/](https://en.fulbright.edu.pl/)
- Kościuszko Foundation's Program for Advanced Study, Research and/or Teaching: [https://www.thekf.org/kf/scholarships/exchange-us/](https://www.thekf.org/kf/scholarships/exchange-us/)
• 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/innowacje

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UNESCO Student Mobility Number:
Portugal has 20,633 students studying abroad according to UNESCO.

CIA World Factbook:
24.52% of the population in Portugal is under 25 years old.

OVERVIEW

The education system in Portugal has undergone significant changes since it became regulated in 1986. The last major reform was the redefining of the degree system according to the Bologna Process, of which Portugal is a signatory nation. 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 2021 Institute of International Education Open Doors Report, there were 791 students from Portugal studying in the United States during the academic year 2020-2021, a decrease of -15.3 percent compared with the previous year. Prior to 2020, the number of students in the U.S. from Portugal had been increasing, although the proportion of the Portuguese population between the ages of 15-24 years has been declining over the past ten years.

In the 2020-2021 academic year, 412 students from Portugal enrolled in the United States at the undergraduate level, followed by the graduate level with 238 students. Optional Practical Training (OPT) followed with 122 students and, lastly, only 19 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.
4. U.S. schools should also provide clear and in-depth information about programs and the application process, as well as describe opportunities for scholarships and financial aid. Due to the current conditions of Portugal’s economy and the fact that tuition fees in Portugal and in Europe are generally lower than in the United States, fully- or partially funded scholarships are the best way to attract Portuguese students.

EVENTS

- Study Abroad Portugal
  Lisbon and Porto, Portugal
  March 2022
  http://www.studyabroadportugal.pt/
- Futurália
  Lisbon, Portugal
  April 2022
  http://futuralia.fil.pt/

RESOURCES

- U.S. Commercial Service, Portugal: https://www.trade.gov/portugal
- U.S. & Foreign Commercial Service Global Education Team: http://www.trade.gov/education-industry
- Industry and Analysis, Office of Supply Chain, Professional & Business Services: https://www.trade.gov/professional-and-business-services
- Fulbright Commission Portugal: http://www.fulbright.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

Capital: Doha
Population: 2.5 million (July 2021 est.)
GDP (Purchasing Power Parity): $245.7 billion (2020 est., in 2017 dollars)
Currency: Qatari Rial (QAR)
Language: Arabic (Official), English (commonly used as second language)

UNESCO Student Mobility Number
Qatar has 8,527 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. In 2020, Qatar allocated $6.07 billion to the education sector, which represented 10.5% of the total budget. 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 2019-20 academic year, there were 166 secondary schools (private and public) serving 52,161 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 were more than 332 private schools operating in Qatar in the 2019-2020 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 39,000 students registered during the 2019-2020 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 foreground 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/Deputy/HEaffairs/Pages/UnischolarshipeOut.aspx.

**SUB-SECTORS**

**Higher Education**

There were 562 students from Qatar studying in the United States during the 2020-2021 academic year, according to the IIE Open Doors Report. This is a 16.1% decrease than the previous year; however, this mirrors the overall decline in international students studying in the U.S. for the 2020-2021 academic year (15% decrease in the international enrollment rate).

The academic level segmentation is as follows:

- Undergraduate Education: 459 students, a 17.1% decrease since the last academic year.
- Graduate: 73 students, a 2.7% decrease since the last academic year.
- Non-Degree Studies: 12 students, a 61.3% decrease since the last academic year.
- Optional Practical Training (OPT): 18 students, an 80% increase since the last academic year.

According to Qatar’s Education Statistical Profile 2019-2020, 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). In 2018, there were 24,000 Qatari male trainees and 25,000 Qatari female trainees. Both indicators have increased consistently since 2013. 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

• 1324th International Conference on Education and Social Science http://iser.co/Conference2022/Qatar/1/ICESS/
• International Society for Engineers and Researchers Conference - for the promotion of international education and university cooperation in the fields of science, engineering, and technology. Doha, Qatar July 10 - 11, 2022 http://iser.co/
• University Expo Qatar - a comprehensive two-day exhibition attended by students age 16+ who are considering their higher education options, as well as their parents and teachers Oct. 19-20, 2022 https://informaconnect.com/uniexpoqatar/

RESOURCES

• U.S. Commercial Service – Qatar: https://www.trade.gov/qatar/
• 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

U.S. COMMERCIAL SERVICE CONTACT

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ROMANIA

Capital: Bucharest
Population: 21.2 million (July 2021 est.)
GDP (Purchasing Power Parity): $556.1 billion (2020 est., in 2017 dollars)
Currency: Romanian Leu (RON)
Language: Romanian (official) 85.4%, Hungarian 6.3%, Romani 1.2%, other 1%, unspecified 6.1% (2011 est.)

UNESCO Student Mobility Number
Romania has 35,172 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. Government expenditures on education are still lower than the EU average, and Romania’s public expenditure on education as a percentage of GDP was 2.82% in 2018, 2.57% in 2019, and 2.72% in 2020, in comparison to the EU average of 4.76%, according to EuroStat (https://ec.europa.eu/eurostat/databrowser/view/educ_uoe_fine06/default/table?lang=en).

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. Its current GDP growth rate is expected to be 6% in 2021, based on data from the World Bank (https://data.worldbank.org/country/romania?view=chart). Rising GDP has also created a greater demand for quality education and overseas studies.

The education system of Romania today resembles the French education system. During the Communist era, however, it was influenced by the Soviet education system (especially in the 1950s) and included political propaganda, as well as hours of compulsory physical work by school children (usually in agriculture).

Romania is one of Europe’s fastest growing economies. 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.
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).

According to Eurydice (https://eacea.ec.europa.eu/national-policies/eurydice/content/romania_en), 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

Structure of the National Education System / Source: Eurydice 2020/21

Romania ranks 6th in the all-time medal count at the International Mathematical Olympiad, with 316 total medals dating back to 1959. Romania also ranks 6th in the all-time medal count at the International Olympiad in Informatics, with 107 total medals dating back to 1989.

Private education has become increasingly popular in Romania in recent years, and the number of private schools has grown steadily from year to year.

According to the U.S. Embassy – Bucharest’s Educational Exchanges Program (https://ro.usembassy.gov/education-culture/educational-exchanges/), 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 (https://ro.usembassy.gov/education-culture/information-resource-center/) 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.

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://ibbsb.ro/
• British School of Bucharest https://www.britishschool.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://actonbucarest.ro/
• 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 (https://insse.ro/cms/en), 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 (https://opendoorsdata.org/data/international-students/all-places-of-origin/), there were 852 international students from Romania at U.S. higher education institutions in 2020-2021, a decrease of 14.8% 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

Online education programs were not popular in Romania before the COVID-19 pandemic. Leading universities in large cities already provided online education programs, but traditionally, the online programs have been 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.

The introduction of online teaching in response to the COVID-19 pandemic in Romania between March and June 2020 had negative consequences on a significant number of students, by partially or totally limiting their access to education. Online teaching continued with the start of the 2020-2021 school year in many schools in Romania, either via an exclusively online format or in a hybrid format. Since September 11, 2020, the number of schools in the red (online) scenario has steadily increased. As of November 9, 2020, all schools were listed in the red scenario.

Based on AmCham Romania's Position Paper (https://www.amcham.ro/download?filename=Position%20paper%20on%20blended%20learning&file=committeePaper/uQUVP0w.pdf), 510,000 students do not have access to online school, according to estimates by the Ministry of Education. 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 (https://www.salvaticopii.ro/).

Therefore, in the context of the digital transition, AmCham Romania's Committees for Education & Digital Economy (https://www.amcham.ro/committee-and-task-force/education and https://www.amcham.ro/committee-and-task-force/digital-economy), recommend that education reform in Romania must ensure a fair transition to a digital society and economy,
one that offers everyone equal opportunities for development and prosperity. A roadmap for the Romanian digital education reform is included in the 2021-2027 Digital Education Action Plan (https://education.ec.europa.eu/focus-topics/digital/education-action-plan) launched by the European Commission together with EU’s members states. Digital competences have become key for citizens to participate in today’s social, economic, and civic life. Like previous major technological advances, digitalization is transforming the nature of work, and poses new challenges:

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

According to the analysis of the Science | Business Network (https://sciencebusiness.net/news/romanian-researchers-push-reform-national-rd-funding) of universities, companies, and research and policy organizations, 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. Based on the OECD and European Commission’s “Supporting Entrepreneurship and Innovation in Higher Education in Romania” document (https://heinnovate.eu/sites/default/files/oecd_ec_supporting_entrepreneurship_and_innovation_in_higher_education_in_roma.pdf), Romania has strong reasons for designing policies that promote access to entrepreneurial education and the country is headed in the right direction. For instance, the National Strategy for Tertiary Education in Romania 2015-
20 supports efforts to "develop an ongoing curricular assessment for transversal skills and entrepreneurship" as part of the quality assessment of the higher education system. Going forward, progress needs to be made towards increasing opportunities for entrepreneurship teaching and learning in all HEIs and in involving the business sector in curriculum development.

In 2016, the Ministry of Education launched "Romanian ERA Roadmap" (https://era.gv.at/public/documents/2901/Romanian_ERA_Roadmap.pdf) to initiate objectives and measures in line with the National Strategy for RD&I, as a contribution to the development of the European Research Area (ERA), guided by six priorities:

1. More effective national research systems
2. Optimal transnational cooperation and competition
3. An open labor market for researchers
4. Gender equality and gender mainstreaming in research
5. Optimal circulation, access to, and transfer of scientific knowledge
6. Strengthening of the international dimension of the ERA

More than 70% of the world's knowledge is generated outside of Europe. Therefore, access to this knowledge potential in research and innovation through international cooperation is vital to increase Romania's visibility in this area, to strengthen the national RD&I system, and to enhance Romania's competitiveness in the long term. The National Authority for Scientific Research and Innovation will continue to support dialog with third countries to strengthen ongoing cooperation programs and to facilitate the opening of new cooperation programs, based on the existing bilateral agreements on RD&I. A range of bilateral cooperation programs with third countries from Africa and Asia are ongoing, and efforts will be made to maximize their impact, while special attention will be given to accelerating the policy dialogue with third countries in North and South America to open new cooperation programs.

An ambitious budget to find solutions to the main challenges of EU Member States' Research & Innovation Priorities is the Horizon Europe Program (https://op.europa.eu/en/publication-detail/-/publication/1f107d76-acbe-11eb-9767-01aa75ed71a1), which has a budget of EUR 95.5 billion for the period 2021-2027. This includes EUR 5.4 billion from the Next Generation EU instrument, particularly to support green and digital recovery from the COVID-19 crisis. The budget is divided amongst four pillars to create a program that will support all the areas of research and innovation:

1. Excellent Science
2. Global Challenges and Industrial Competitiveness
3. Innovative Europe
4. Widening Participation and Strengthening the European Research Area

Horizon Europe is complemented by the Euratom 2021-2025 Research and Training Program (https://op.europa.eu/en/publication-detail/-/publication/f358e7de-b2ca-11eb-8aca-01aa75ed71a1/language-en). This program will pursue nuclear research and training activities, with an emphasis on the continuous improvement of nuclear safety, security, and radiation protection; as well as to complement the achievement of Horizon Europe’s objectives. The program has a budget of EUR 1.4 billion over the period 2021-2025, bringing the total budget available for both programs to EUR 96.9 billion.
As an EU member state, Romania is eligible to submit research and innovation projects to access funds from both the Horizon Europe and Euratom Programs, in addition to the EU funds allocated to Romania in the 2021 – 2026 Recovery and Resilience Facility’s Education Chapter as detailed in the below “Educated Romania” Program.

**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 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/

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**

According to Digital 2021: Romania Report (https://datareportal.com/reports/digital-2021-romania?rq=romania), in Romania there are 15 million Internet users, which is around 80% of the entire population. The number of Internet users in Romania increased by 289,000 (+1.9%) between 2019 and 2020.

There were 26.63 million mobile connections in Romania in January 2020. The number of mobile connections in Romania decreased by 244,000 (-0.9%) between January 2019 and January 2020. The number of mobile connections in Romania in January 2020 was equivalent to 138% of the total population.

Facts:

- 19.30 million – total population
- 26.63 million – mobile connections (138%)
- 15.35 million – Internet users (80%)
- 11.00 million – active social media users (57%)

YouTube, Facebook, and WhatsApp are the most popular social media platforms in Romania. The following list shows the main social media platforms and the extent to which respondents use them:

- 92% - YouTube
- 90% - Facebook
- 74% - Facebook Messenger
- 72% - WhatsApp
- 57% - Instagram
- 36% - Twitter

Due to the recent COVID-19 pandemic, schools and universities in Romania have migrated to online classes. Preferred online platforms are: Zoom (25%), Google Classroom (23%), and WhatsApp (20%). Other platforms used include Messenger (13%), Skype (3%), and Discord (2%), as published by statistical website Statista (https://www.statista.com/statistics/1233464/romania-platforms-used-for-online-classes/).

According to UNICEF’s Survey Report about Online School (https://www.unicef.org/romania/ro/pove%cc8%99ti/sondaj-u-report-privind-%c8%99coala-online), more than 2,400 children and young people mentioned other platforms and according to their answers, 33.98% have had access to education during this period through Adservio, 24.76% through Microsoft Teams, 7.77% via Google Services (e.g., Google Drive and Google Classroom), 5.34% through a school’s own platform, 3.40% via WebEx, and less than 2% through the platforms Meet, 24edu,
Sociology, and WhatsApp. 18.45% connect with teachers through other platforms, namely Facebook and Facebook Messenger.

The Job Boards Finder Search Engine (https://www.jobboardfinder.com/search/best-job-site-in-romania) shows that 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.

Based on SimilarWeb’s “Top Five Websites Ranking for TV Movies and Streaming” in Romania for November 2021, YouTube ranked #1 and is followed by http://www.filmeserialeonline.org as the runner up. Netflix ranked third place. Closing out the top five, https://www.antena3.ro ranked in 4th place, and https://www.cinemagia.ro in 5th position.

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
  March 4-10, 2022
  https://www.educationfair.nl/event/world-education-fair-romania/
- Online Education Fair
  Balkans
  March 9, 2022
  https://www.educationfair.nl/event/online-education-fair-balkans/

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SINGAPORE

Capital: Singapore
Population: 5.9 million (July 2021 est.)
GDP (Purchasing Power Parity): $531 billion (2020 est., in 2017 dollars)
Currency: Singapore dollars (SGD)
Language: English, Mandarin, other Chinese dialects, Malay, Tamil (2011 est.)

UNESCO Student Mobility Number:
Singapore has 23,456 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 2021 Open Doors Report, Singapore has 3,558 students studying in the U.S.; this number has decreased by 21% compared to the previous year and corresponds to the increased student visa numbers being issued to Singaporeans. See figures below at each September for the 10-year period ending in 2021:

- 2011: 2875 (2.2% increase)
- 2012: 3109 (8.1% increase)
Out of the 3,558 students, 43% are pursuing undergraduate courses and 35% 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 is 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.

### Best Prospects

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>High School</td>
<td>N</td>
</tr>
<tr>
<td>Boarding Schools</td>
<td>N</td>
</tr>
<tr>
<td>Community College</td>
<td>Y</td>
</tr>
<tr>
<td>Undergraduate</td>
<td>Y</td>
</tr>
<tr>
<td>Graduate</td>
<td>Y</td>
</tr>
<tr>
<td>Law School</td>
<td>N</td>
</tr>
<tr>
<td>OPT</td>
<td>Y</td>
</tr>
<tr>
<td>ESL</td>
<td>N</td>
</tr>
<tr>
<td>Online Degree</td>
<td>Y</td>
</tr>
<tr>
<td>Summer/Certificate Programs</td>
<td>Y</td>
</tr>
</tbody>
</table>

### Best Student Recruitment Methods

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Education Agents</td>
<td>N</td>
</tr>
<tr>
<td>Institutional</td>
<td>Y</td>
</tr>
<tr>
<td>Student Outreach</td>
<td>Y</td>
</tr>
<tr>
<td>Online Outreach</td>
<td>N</td>
</tr>
</tbody>
</table>

### EVENTS


### RESOURCES

- U.S. Commercial Service - Singapore: [https://www.trade.gov/singapore](https://www.trade.gov/singapore)
- U.S. Commercial Service Global Education Team: [https://www.trade.gov/education-industry](https://www.trade.gov/education-industry)
- Industry and Analysis, Office of Supply Chain, Professional & Business Services: [https://www.trade.gov/professional-and-business-services](https://www.trade.gov/professional-and-business-services)
- EducationUSA: [https://educationusa.state.gov/centers/educationusa-singapore-advising-center](https://educationusa.state.gov/centers/educationusa-singapore-advising-center)
- IIE: [https://www.iie.org/opendoors/](https://www.iie.org/opendoors/)
- Central Intelligence Agency: [https://www.cia.gov/the-world-factbook/](https://www.cia.gov/the-world-factbook/)
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SOUTH AFRICA

Capital: Pretoria
Population: 56.98 million (July 2021 est.)
GDP (Purchasing Power Parity): $680.04 billion (2020 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 10,503 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**

<table>
<thead>
<tr>
<th>Sector (Open Doors Report 2021)</th>
<th>Percentage By Sector % (2020-2021)</th>
<th>% Change In Sector (From previous year)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>57.8%</td>
<td>-4.6%</td>
</tr>
<tr>
<td>Graduate</td>
<td>26.0%</td>
<td>-2.2%</td>
</tr>
<tr>
<td>Non-Degree</td>
<td>2.1%</td>
<td>-60.2%</td>
</tr>
<tr>
<td>Opt</td>
<td>14.2%</td>
<td>-3.3%</td>
</tr>
</tbody>
</table>

**Study in the U.S. by Institution Type**

<table>
<thead>
<tr>
<th>Institution Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associate (2 year) Colleges</td>
<td>11.6%</td>
</tr>
<tr>
<td>Baccalaureate (4 year) Colleges</td>
<td>10.4%</td>
</tr>
<tr>
<td>Doctorate - granting Universities</td>
<td>57%</td>
</tr>
<tr>
<td>Masters Colleges and Universities</td>
<td>15.9%</td>
</tr>
<tr>
<td>Special Focus Institutions</td>
<td>5.1%</td>
</tr>
<tr>
<td>Public Institutions</td>
<td>48.3%</td>
</tr>
<tr>
<td>Private Institutions</td>
<td>51.7%</td>
</tr>
</tbody>
</table>

**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.

EVENTS

• Worldview Education Fairs: https://www.worldviewevents.com/
• Various embassies education fairs

RESOURCES

• U.S. Commercial Service – South Africa: https://www.trade.gov/south-africa
• 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
• EducationUSA/Fulbright: https://za.usembassy.gov/education-culture/study-usa/
• 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/
• South Africa Education Agents: https://www.educationagentsguide.com/south_africa/index.htm

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SOUTH KOREA

Capital: Seoul
Population: 51.7 million (July 2021 est.)
GDP (Purchasing Power Parity): $2.188 trillion (2020 est., in 2017 dollars)
Currency: South Korean won (KRW)
Language: Korean

UNESCO Student Mobility Number
South Korea has 101,493 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 39,491 Korean students were enrolled in U.S. institutions for academic year 2020-2021. 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.

<table>
<thead>
<tr>
<th>Total Korean Students Studying in the United States</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year</td>
</tr>
<tr>
<td>South Korea’s Rank</td>
</tr>
<tr>
<td>Korean Students</td>
</tr>
<tr>
<td>% Percentage Change</td>
</tr>
<tr>
<td>No. of New International Student Enrollment</td>
</tr>
<tr>
<td>Total No. of International Students</td>
</tr>
</tbody>
</table>

Source: IIE Open Doors Report

**SUB-SECTORS**

**Undergraduate and Graduate Programs**

According to Open Doors 2021, 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.

<table>
<thead>
<tr>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Undergraduate</td>
<td>30,080</td>
<td>27,638</td>
<td>25,161</td>
<td>23,415</td>
<td>17,743</td>
</tr>
<tr>
<td></td>
<td>Graduate</td>
<td>16,471</td>
<td>15,572</td>
<td>15,518</td>
<td>15,219</td>
<td>14,238</td>
</tr>
<tr>
<td></td>
<td>Non-Degree</td>
<td>4,328</td>
<td>3,631</td>
<td>3,497</td>
<td>3,301</td>
<td>840</td>
</tr>
<tr>
<td></td>
<td>OPT</td>
<td>7,784</td>
<td>7,714</td>
<td>8,074</td>
<td>7,874</td>
<td>6,670</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>58,663</td>
<td>54,555</td>
<td>52,250</td>
<td>49,809</td>
<td>39,491</td>
</tr>
</tbody>
</table>

Source: IIE Open Doors 2020 Report

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: https://www.uhak2min.com/en/
- The MBA Tours: https://www.thembatour.com
- University Fair organized by Linden Tours: www.lindentours.com

RESOURCES

- U.S. Commercial Service - South Korea: https://www.trade.gov/south-korea
- U.S. 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
- Fulbright (Korean-American Educational Commission): https://www.fulbright.or.kr
- EducationUSA: https://educationusa.state.gov
- KOSA (Korea Overseas Studying Agencies): https://www.kosaworld.org

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TAIWAN

Capital: Taipei
Population: 23.57 million (July 2021 est.)
GDP (Purchasing Power Parity): $1.143 trillion (2019 est., in 2017 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

USD thousands

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taiwan Students in the U.S.</td>
<td>22,454</td>
<td>23,369</td>
<td>23,724</td>
<td>19,673</td>
</tr>
<tr>
<td>Taiwan Students’ Contribution to U.S. Economy</td>
<td>$824,000</td>
<td>$874,771</td>
<td>$991,000</td>
<td>$875,000</td>
</tr>
<tr>
<td>Exchange Rate: USD1</td>
<td>30.59</td>
<td>30.11</td>
<td>27.89</td>
<td>27.71</td>
</tr>
</tbody>
</table>

Sources: IIE Open Doors 2021 Report; NAFSA Economic Analysis for 2020-2021 Academic Year; Exchange rates: U.S. Treasury Department

According to the Institute of International Education's 2021 Open Doors Report (https://www.iie.org/opendoors), 19,673 students from Taiwan studied in the United States during the 2020/2021 academic year, a 17.1% decrease over the 2019/2020 academic year. These students contributed $875 million to the U.S. economy. Taiwan is the seventh leading source of students going to the United States and the second source of students per capita (behind Kuwait and followed by Hong Kong). Of the Taiwanese students studying in the United States in the 2020/2021 academic year, 40.9% were graduate students, 31.1% were undergraduates, 2.4% were non-degree students, and 25.6% undertook OPT (Optional Practical Training). The most popular fields of study for Taiwanese students were STEM (50.7%), business and management (17%), other fields of study (11.9%), and fine/applied arts (8.1%).

Taiwan's early 2000s educational reforms, which upgraded vocational and technical colleges to become universities, have resulted in an oversupply of universities, a devaluation of college degrees, and a mismatch of the labor supply to job market demand. These overcapacity issues are further complicated by Taiwan's persistently low birthrate. It is estimated that by 2023, there will be 184,000 new college entrants, a huge decline from 271,108 new entrants in 2013. This 32% decline is a major concern as it could lead to a labor shortage in the future workforce and the forced closure of many higher education institutions.
With the goal of “bilingual by 2030,” Taiwan plans to incorporate new forms of English learning in education models focusing on speaking and listening, introduce technology to teach English remotely, promote cooperation and linkages between Taiwan and English-speaking countries’ colleges and universities, and encourage private enterprise to provide English services to the public.

According to statistics from the Taiwan Ministry of Education, a total of 71,488 Taiwan students went abroad to study or work in 2020. The United States remained the top study destination for Taiwan students, with 23,724 students, accounting for 33.2% of Taiwan students going abroad. Australia came in second, with 18,439 students, and Japan third, with 9,584 students. 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.

**Taiwan Student Study Abroad Destinations in 2020**

<table>
<thead>
<tr>
<th>Destination</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America (mainly US)</td>
<td>28,861</td>
</tr>
<tr>
<td>Oceania (mainly Australia)</td>
<td>19,750</td>
</tr>
<tr>
<td>Asia (mainly Japan)</td>
<td>11,814</td>
</tr>
<tr>
<td>Europe (mainly UK)</td>
<td>11,061</td>
</tr>
<tr>
<td>Others</td>
<td>2</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>71,488</td>
</tr>
</tbody>
</table>

*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.

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
- 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, Taichung, 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 represents an important education technology market because of its growing interests in innovative approaches to learning. Educators are increasingly embracing education information technology (IT) as a way to extend educational resources to a broader audience base and an increasingly personalized learning environment. Areas of interests include game-based learning and AR/VR technologies for education or vocational training, K-12 STEM education (especially in robotics or coding education), language-learning technologies, mobile learning technologies, and simulation learning for medical training or vocational training.

In 2020, Taiwan's smart education industry output reached NT$142.68 billion (US$5.11 billion), according to MIC report. About nearly 50%, or NT$66.86 billion (US$2.39 billion), was contributed by exports of Taiwan's smart education sector, indicating the sector's strong international competitiveness.
**Estimated 2020 Output Value in Taiwan**
*Source: MIC (2020)*

### Estimation of Sub-category

<table>
<thead>
<tr>
<th>Category</th>
<th>Sub-Category</th>
<th>Estimated (%)</th>
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</thead>
<tbody>
<tr>
<td>Services/Content</td>
<td>Content</td>
<td>73%</td>
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<tr>
<td></td>
<td>Services</td>
<td>27%</td>
</tr>
<tr>
<td></td>
<td>Total</td>
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<td>Software</td>
<td>Learning System</td>
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<tr>
<td></td>
<td>Tools (i.e. editing, data analytics, etc.)</td>
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</tr>
<tr>
<td></td>
<td>Total</td>
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</tr>
<tr>
<td>Hardware</td>
<td>Teaching Devices (i.e. projectors, tablets, etc.)</td>
<td>91%</td>
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<tr>
<td></td>
<td>Infrastructure (i.e., Wi-Fi)</td>
<td>9%</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>100%</td>
</tr>
</tbody>
</table>


### 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:
• The Association of Boarding Schools (TABS) Fair: https://www.boardingschools.com
• Linden Education Fairs: https://www.lindentours.com/fairs/
• The MBA Tour, Taipei (Virtual Event): https://thembatour.com
• Oh! Study International Education Expo (March 6-10, 2021): https://ohstudy.net/expo/

RESOURCES

• U.S. Commercial Service – Taiwan: https://www.trade.gov/taiwan
• 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
• 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/

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THAILAND

Capital: Bangkok
Population: 69.5 million (July 2021 est.)
GDP (Purchasing Power Parity): $1.2 trillion (2020 est., in 2017 dollars)
Currency: Thai Baht
Language: Thai (official)

UNESCO Student Mobility Number:
Thailand has 32,607 students studying abroad according to UNESCO.

CIA World Factbook:
29.47% of Thailand's population is under 25 years old.

OVERVIEW

Many Thai students are resuming their study abroad as the Covid-19 situation has started to improve. Since 2020, foreign education agencies and embassies in Thailand have been actively promoting study abroad opportunities to attract Thai students, including offering financial aid, a pathway program for international students, scholarship opportunities, and post-study work visas to work in-country for two to three years after graduation.

Thailand’s education market continues to face significant challenges as it starts to recover from the impacts of the pandemic. Student safety and inadequate education infrastructure, particularly for online or virtual school, are major concerns for parents. The Ministry of Education (MOE) made efforts to roll out 10 million vaccination doses for teachers and for students ages 12 to 18 to encourage a return to campus, resulting in over 80 percent of eligible students and teachers in Thailand receiving vaccines. Meanwhile, many vaccinated Thai students have started returning to the United States to complete their programs and resume their plans of study.

Thailand’s education system has room for improvement, including reducing the learning gap between students at elite and underprivileged schools, upskilling students’ and instructors' English proficiency, enhancing teachers' skills, and revamping quality educational materials. Additionally, a lack of computers, notebooks, cell phones, television, and IT equipment; non-standardized e-learning platforms; and limited Internet bandwidth mean that Thai students face difficulties in accessing online learning and keeping up with the lessons.

Thailand’s education market is also challenged by the declining number of students due to demographic trends, with Thailand’s population aging rapidly. 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 hit below 60,000 for the first time and the total fertility rate decreased to 1.51, which is considered extremely low.
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 have closed during the past nine months due to financial problems.

**SUB-SECTORS**

**Higher Education**

According to the 2020-2021 Open Doors report, prepared by the Institute of International Education (IIE), in 2021, the total number of Thai students declined by 19 percent to 4,960 students, compared to 6,154 students the previous year. By academic level, Thai students studying in the U.S. were comprised of 45 percent undergraduates, 35 percent post-graduates, 17 percent Optional Practical Training (OPT) students, and three percent short-term, non-degree program students (one-year exchange students and English as a Second Language (ESL) students). However, the pandemic forced many Thai students to either return home and continue studying online or postpone plans to study in the United States.

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.

**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, and robotics programs. 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.

**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. The Ministry of Education (MOE) allows schools to select the online learning platform of their choice and encourages additional training for teachers to familiarize themselves with available online platforms to be able to support their students as they study at home.

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**

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.

Thai students seeking high school education exchange programs represent 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.

Thai students seeking higher education and graduate degrees currently face a significant obstacle in that their high school grade point average (GPA) and standardized test scores often do not meet U.S. standards, and this limits the number of Thai students admitted to universities in the U.S. It is recommended that U.S. schools and higher education representatives work with partners in Thailand to promote their institutions and increase their accessibility.

Thai students are mostly self-funded and return to Thailand after graduation. Scholarship opportunities are also available through government agencies and private companies to those employees who are interested in studying abroad.

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 48.6 million Internet users, an increase of 3.4 million (7%) between 2020 and 2021. Thailand also has 47.5 million mobile users and 55 million social media users. The most used social media platforms in Thailand are Facebook, YouTube, Line, Instagram, Twitter, and TikTok. Thailand has around 51 million Facebook users, 45 million Line users, 37 million YouTube users, 16 million Instagram users, and 7 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


RESOURCES

- U.S. Commercial Service - Thailand: https://www.trade.gov/thailand
- U.S. 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
- EducationUSA: https://educationusa.state.gov/centers/us-embassy-bangkok
- Fulbright Thailand – United States Education Foundation: https://www.fullbrightthai.org/
- Thai Office of Educational Affairs, DC (OEA): http://oeadc.org/en/contact

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OVERVIEW

Turkey's population of 82.5 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 2021, there are 129 public and 74 foundation (private) universities, serving 8.24 million students in various academic programs. 2020 figures reveal that 3.37 million students are enrolled in undergraduate and vocational programs; 343,569 in graduate programs; 106,148 in doctoral programs; and 4.42 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 2021, 2,592,390 high school graduates took the exams, and 816,747 applicants were enrolled in a 4-year program, while 793,166 applicants were enrolled in a 2-year program. The remaining test takers were unable to enter a higher education program of their choice. In Turkey, the Ministry of National Education is responsible for administering nearly all educational services in the country, except for higher education. The Council of Higher Education (YÖK) is a 22-member corporate-public body responsible for the planning, coordination, and supervision of higher education.

Capacity and quality constraints of Turkish higher education institutions spur demand for 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 47,000 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 training.
SUB-SECTORS

Higher Education

The Institute of International Education’s Open Doors 2021 statistics show that Turkey, with its 8,109 students, is the fifteenth leading place of origin for foreign students in the U.S. Among European countries, Turkey holds the second place for number of students in the U.S., following the U.K. The enrollment levels of Turkish students are as follows:

Undergraduate: 2,693
Graduate: 3,834
Other (Non-degree programs): 132
Optional Practical Training: 1,450

About half (47%) of Turkish students at 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 Turkish 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 extracurricular 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 U.S. universities and colleges to explore recruitment possibilities from Turkey. The results of the central university placement
exam in Turkey 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 processes since the scholarship sponsors pay for their entire program and scholarship holders are usually obliged to work at their sponsoring organization 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 Turkey, 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.

**EVENTS**

- **Study Expo Study Abroad Fairs**
  February 26-27, 2022 - Istanbul (Hybrid)
  [https://www.studyexpo.com/exhibitors](https://www.studyexpo.com/exhibitors)
- **EURIE - Eurasia Higher Education Summit**
  March 2-4, 2022 – Istanbul (Hybrid)
  [https://www.eurieeducationsummit.com/](https://www.eurieeducationsummit.com/)
- **IEFT Study Abroad Fairs**
  April 10-17, 2022 – Ankara, Izmir, Istanbul (Hybrid)
  [https://www.ieft.net](https://www.ieft.net)
- **A2 Study Abroad Fairs**
  April 2-9, 2022 – Istanbul, Ankara, Izmir (Hybrid)
  November 12-18, 2022 - Istanbul, Ankara, Izmir (Hybrid)
  [http://www.a2fairs.com/](http://www.a2fairs.com/)

**RESOURCES**

- U.S. Commercial Service – Turkey: [https://www.trade.gov/turkey](https://www.trade.gov/turkey)
- U.S. & Foreign Commercial Service Global Education Team: [https://www.trade.gov/education-industry](https://www.trade.gov/education-industry)
- Turkish Ministry of National Education: [http://meb.gov.tr](http://meb.gov.tr)
- EducationUSA Turkey: [https://educationusa.state.gov/search/node/Turkey](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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UKRAINE

Capital: Kyiv
Population: 43.7 million (July 2021 est.)
GDP (Purchasing Power Parity): $516.7 billion (2020 est., in 2017 dollars)
Currency: Ukrainian hryvnia
Language: Ukrainian (official)

UNESCO Student Mobility Number
Ukraine has 77,586 students studying abroad according to UNESCO.

CIA World Factbook
25% of Ukraine’s population is under 25 years old.

OVERVIEW

With nearly 5.7 million students in a country the size of Texas, Ukraine is among the largest and most talented international student markets in Europe. According to UNESCO, Ukraine has an adult literacy rate of 99.97%.

Despite its track record in producing talented, literate students, over the last twenty years Ukraine’s educational system has suffered, which in turn has caused increasing numbers of students to look for study abroad programs. According to UNESCO, the number of Ukrainian international students has tripled since 2009 and reached 77,586 in 2019 with an outbound mobility ratio of 4.8 percent. The most attractive countries for Ukrainian students to study in are Poland, Russia, Germany, Slovakia, Czech Republic, and the United States.

It is important to mention that Ukrainians dominate the international population in Poland, more than half of all international students. The reasons for that are the lower cost and having a diploma that is valid in the whole EU.

Education reform introduced in 2014 holds significant promise for a fundamental transformation of the sector. The new laws adopted in recent years – for Higher Education in 2014, for Research and Scientific Activity in 2015, and the “Law on Education” in 2017 represent a major shift towards democracy and decentralization of the education system in Ukraine and lead to its further harmonization and integration with European norms and standards.

SUB-SECTORS

Higher Education

According to the most recent Open Doors Report by the Institute of International Education, 1,739 Ukrainian students went to the U.S. to study in 2020-21 which is 8.4 percent less than the previous year. The reason for that was the effects of the Covid-19 pandemic. 50 percent of Ukrainians studying in the U.S. pursue bachelor’s degrees, 30 percent enroll in graduate programs, 16 percent take optional practical training, and 4 percent go for non-degree programs. Due to a limited number of high-quality business education programs in Ukraine,
business administration is the number one field of study for Ukrainian international students followed by engineering/computer science, law, intensive English, and languages.

Sub-Sector Best Prospects

- Higher Education
- Secondary Education

OPPORTUNITIES

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

The most popular destinations for prospective students looking for high quality education are Germany followed by the U.S., Canada, and the U.K. When selecting a country, Ukrainians base their decisions on a country's reputation for helping a student with career preparation and the strength of a country's overall education system. When comparing schools, prospective students consider first the quality and then the cost of tuition.

Even though cost is a major obstacle for Ukrainians to study in the U.S., nearly all agents report that they currently partner with U.S. schools in recruiting students. Most of them are currently satisfied with the support they receive from the U.S. institutions.

DIGITAL MARKETING STRATEGIES

Before the pandemic, foreign educational institutions used to organize seminars, participate in education fairs, and arrange partner workshops to recruit Ukrainian students. Today, many events have been shifted to the virtual space, but face to face communication is still essential to develop partnerships in Ukraine. Local agents are open to speaking with institution representatives online. Skype and Zoom are the most used platforms for communication while Facebook, Instagram, and YouTube are the best choices for promotional purposes.

EVENTS

There are no educational trade events on a national level in Ukraine. The educational companies organize their own fairs and invite international schools to participate. The most popular events are:

- DEC Study Abroad Fair
- Study UA Fair
- EducationUSA fair – October/November 2022 (TBD)

RESOURCES

- U.S. Commercial Service – Ukraine: https://www.trade.gov/ukraine
- 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
• Ministry of Education and Science of Ukraine: https://mon.gov.ua/eng
• American Councils Kyiv: https://educationusa.state.gov/centers/american-councils-kyiv
• America House Kyiv: http://www.americahousekyiv.org/

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UNESCO Student Mobility Number:
The United Arab Emirates has 13,480 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. The UAE Vision 2021, launched in 2010, emphasizes the development of a first-rate education system. As such, this sector continues to experience rapid expansion. Education represents 16.3% of the country's $16 billion federal budget for 2022. 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. In addition, the UAE's Strategic Education Plan 2017-2021 seeks to raise the upper secondary graduation rate to 98% and pre-school enrollment rate to 95%, among other targets.

A massive vaccination campaign was conducted in 2021 across the country. As a result, the UAE reached one of the highest vaccination rates worldwide very early on. UAE authorities announced that all schools and universities (https://www.thenationalnews.com/uae/2021/10/05/abu-dhabi-schools-to-ease-covid-19-safety-measures-based-on-vaccination-rates/) will return to 100% capacity from January 2021, but must continue to follow Covid-19 safety measures (https://www.thenationalnews.com/uae/latest-covid-19-rules-in-dubai-and-abu-dhabi-what-you-need-to-know-1.1155777). Authorities recommended that all eligible teachers, support staff, and pupils receive a third dose of the Covid-19 vaccine to gain protection from the new variants (https://www.thenationalnews.com/coronavirus/2021/10/21/covid-19-vaccines-will-i-need-a-booster-dose-to-travel-this-winter/). Dubai’s private schools ended distance learning in October 2020 (https://www.thenationalnews.com/uae/2021/08/22/when-do-children-go-back-to-school-for-the-new-academic-year/). However, some schools across the country continued to offer hybrid education in academic year 2021-2022.

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.

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 two education free zones: Dubai Academic City (DAC) for primary, secondary, and higher education and Dubai International Academic City (DIAC) for tertiary education. DAC was created in 2006 by TECOM Investments and aims to position Dubai as an education hub. It has established industry and university partnerships to help students build skills that make them employable. 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 2020-2021, the UAE had 1,737 students in the United States in undergraduate, graduate, non-degree, and optional practical training (OPT) programs, according to the 2021 Open Doors Report, a decrease of 16.2% from the previous year.
Undergraduate and Graduate Education

1,399 Emirati students enrolled in undergraduate education in the United States during the 2020-2021 academic year, a decrease of 15.5% from the previous year, and 233 enrolled in graduate-level studies, representing an 8.6% decrease. 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

Scholarship granting entities in the UAE do not include community colleges in their list of approved universities. Community colleges are more attractive to non-Emirati students residing in the UAE, which constitute a large majority of the population. 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 non-coeducational education 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.

**Research & Development**

Joint collaboration in research and development presents opportunities for U.S. and UAE universities.

**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
  Hybrid event
  February 7-10, 2022
  [https://www.icef.com/events/icef-dubai/](https://www.icef.com/events/icef-dubai/)
- Global Education and Training Exhibition (GETEX)
  Dubai International Convention and Exhibition Center, Dubai, UAE
February 23-25, 2022
https://mygetex.com/

• Najah Expo
Abu Dhabi National Exhibition Centre (ADNEC), Abu Dhabi, UAE
October 26-28, 2022

• Global Education Supplies and Solutions (GESS)
Sheikh Saeed Halls, Dubai World Trade Centre, Dubai, UAE
Nov 15-17, 2022
https://www.gessdubai.com/

RESOURCES

• U.S. Commercial Service - UAE: https://www.trade.gov/united-arab-emirates
• 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
• The Abu Dhabi Department of Education and Knowledge (ADEK): https://www.adek.gov.ae/
• CIA World Factbook – UAE: https://www.cia.gov/the-world-factbook/countries/united-arab-emirates/#introduction
• Colliers International: https://www.colliers.com/en-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-consultate-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
• IIE Open Doors Data: https://www.iie.org/opendoors/
• International Education Specialists: https://www.idp.com/uae/
• Knowledge and Human Development Authority (KHDA): https://beta.khda.gov.ae/en/
• 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
PRESS ARTICLES

- “AURAK signs a cooperation agreement with Wayne State University”: https://aurak.ac.ae/en/aurak-news-oct-7-2020/

U.S. COMMERCIAL SERVICE CONTACT

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UNESCO Student Mobility Number
The United Kingdom has 39,504 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 2021 Open Doors Report, the United Kingdom was 16th among senders of students to the United States. The UK dropped 2 places from its 2019-2020 position of 14th. 8,028 international students from the UK studied at U.S. higher education institutions during the academic year 2020-2021. This represents a 25.4% decrease from the 2019-2020 academic year number of 10,756. The total number of international students studying in the U.S. decreased by 15%. International students contributed $39 billion to the U.S. economy in 2020 (Department of Commerce).

UK students contributed $398 million to the U.S. economy, a decrease of 11% from the previous year. The UK also dropped from first to third most popular destination for U.S. study abroad students.

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 2021, 53.6% of UK students studying in the U.S. are doing so at the undergraduate level. This represents a 19.1% decline from last year (4,299 undergraduate students in 2020-2021 vs. 5,314 in 2019-2020).
Graduate Education

Graduate students make up 28.7% of UK students studying within the United States. Last year, 2,557 students made up the graduate population and in 2020, there has been a 10.0% decrease for a new total of 2,301 students studying at the graduate level.

Non-degree Education and Optional Practical Training (OPT)

Non-degree education suffered the greatest decline in UK students of any category. From 2019-2020 to 2020-2021, non-degree students dropped from 1,606 to 184, a decline of 88.5%. There are 1,244 UK students who are OPT students. Non-degree students currently represent just 2.3% 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: https://www.whatcareerlive.co.uk/
- USA College Day: https://www.fulbright.org.uk/events
RESOURCES

• U.S. Commercial Service - United Kingdom: https://www.trade.gov/united-kingdom
• 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
• 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 (July 2021 est.)
GDP (Purchasing Power Parity): $75.06 billion (2020 est., in 2017 dollars)
Currency: Uruguayan peso (UYU)
Language: Spanish

UNESCO Student Mobility Number
Uruguay has 5,733 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. The United States is a leading destination for students from Uruguay, according to UNESCO data. The United States welcomed 80,833 visitors from Uruguay in 2019, and 84,399 U.S. visitors traveled to Uruguay during the same time period. While many of the Uruguayan visitors to the United States travel for tourism or business, almost 395 Uruguayan students are currently attending U.S. higher education institutions, according to the 2021 Open Doors Report. This number is similar but differs slightly from the UNESCO report.

Uruguay had a decrease of -12.8% of Uruguayan students going to the United States over the last year due to effects of the pandemic. Uruguay went from 453 pre-pandemic to 395 students at U.S. higher education institutions.

The breakdown is as following: 159 undergraduate students; 166 graduate students; 2 non-degree students (language, short-term non-degree programs, etc.); and 68 OPT students (Optional Practical Training).

In 2021 Uruguay experienced a -0.6 % decrease in the number of undergraduate students going to the United States and a -7.8 % decrease in the number of graduate students.

Many Uruguayans have dual citizenships in European countries and they usually take advantage of this to study there at more competitive prices and in Spanish, in the case of those going to Spain.

A great majority choose neighboring countries such as Argentina and Brazil; however, the United States is the first English-speaking country of choice, followed by the United Kingdom, Australia, and Canada. See numbers below:

414 – United States
87 – United Kingdom
65 – Australia
30 – Canada
Due to the pandemic, Uruguay’s government suspended activities in the country’s educational centers. However, Plan Ceibal (Program One Laptop per Child) helped keep education active at all levels through its digital platform.

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).

On the receiving side, U.S. students studying in Uruguay decreased -7.1% from 212 to 197 according to recent statistics.

**SUB-SECTORS**

**Undergraduate Education**

Although Uruguayan public universities are free for residents, 159 students enrolled in undergraduate programs in the United States during the 2020/21 academic year. This represents a –0.6 % decrease when compared to the previous academic year primarily due to travel restrictions and slowed economic activity.

**Graduate Education**

Typically, graduate programs are popular, however during the 2020/21 academic year, the number of students decreased due to pandemic related travel restrictions. 166 graduate students were enrolled in graduate programs in the United States representing a -7.8% decrease compared to the previous academic year primarily due to travel restrictions and slowed economic activity.

**Non-Degree**

Only 2 students from Uruguay were enrolled in non-degree programs in the United States during the 2020/21 academic year.

**OPT - (Optional Practical Training)**

During 2020/21, 68 Uruguayan students enrolled in OPT programs in the United States representing a 6.3% increase 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 select 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 relatively 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 scored 509 on the English Proficiency Index released by Education First, meaning the country is considered a “Moderate proficiency” country in terms of English speakers. Uruguay ranks 8th in English Proficiency in Latin America. From 2012 to 2017, Uruguay was considered a “Low proficiency” country, which highlights Uruguay's achievements in this area.

In terms of public education, as of August 2021, 91% of the urban school groups in the 4th, 5th and 6th grades of Primary Education had English classes. 65% of students learn English through videoconferencing technologies. There are still 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.

The government of Uruguay incorporated English instruction and related supporting technology into the public schools’ curriculum at all levels. Uruguay is a strong contributor to the Fulbright academic programs, with masters and PhD scholarships in biotechnology, health, energy, agro-industry and food chain development, natural resources, and information and communication technologies.

Popular fields of study for Uruguayan students are engineering, law, and business.

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 the 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, Vera+, 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 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 common in Uruguay, 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 to 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. See information about the last in-person fair in 2019 on the U.S. Embassy in Uruguay’s website (https://uy.usembassy.gov/es/vii-feria-de-universidades-de-estados-unidos-declarada-de-interes-por-el-ministerio-de-educacion-y-cultura/). 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

RESOURCES

- U.S. Commercial Service - Uruguay: https://www.trade.gov/uruguay
- 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
- EducationUSA: http://www.educationusa.state.gov
- EducationUSA Office in Uruguay: http://www.educationusa.org.uy
- Fulbright Commission: https://fulbright.org.uy/
- Smart Talent: https://www.smarttalent.uy/uruguay
- Uruguay XXI: https://www.uruguayxxi.gub.uy/en/
- Live in Uruguay: https://www.liveinuruguay.uy/universities

U.S. COMMERCIAL SERVICE CONTACT

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UNESCO Student Mobility Number
Vietnam has 126,059 students studying abroad according to UNESCO.

CIA World Factbook
37.83% of Vietnam's population is under 25 years old.

OVERVIEW

Domestic Education

The domestic education market in Vietnam continues to strengthen due to the significant increase in per capita income over the past ten years, the expansion of both the manufacturing and services sectors, and the emphasis Vietnamese families traditionally place on ensuring a strong education for their children. As a result, domestic offerings continue to improve, but many affluent families look to education sources outside of Vietnam for the best opportunities. The strongest competition to U.S. institutions is from Asia, including Australia and Japan. These countries are able to promote proximity in what is a family-centric society, affordable costs, and the possibility of post-graduate employment. However, as mentioned, international schools are facing stiff competition from Vietnam's local institutions as well. According to the 2019-2020 academic year report of the Ministry of Education and Training of Vietnam, there are currently 237 universities (172 public, 65 private); 188 colleges; 2,386 upper secondary schools (2,122 public and 264 private); 9,551 lower secondary schools (9,536 public and 15 private); and 13,970 primary schools (13,852 public and 118 private) operating in Vietnam. Most Vietnamese students in higher education study at the undergraduate level.

Overseas Study

According to the data from the Vietnamese Ministry of Education and Training (MoET), there were approximately 190,000 Vietnamese students studying abroad during 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.

Educational exchange is a cornerstone of the U.S. bilateral relationship with Vietnam and a top prospect opportunity for U.S. education institutions. Educational exchange between the two countries will play a key role in the process of expanding our bilateral relations and consolidating our comprehensive cooperation as these scholars become Vietnam's future leaders.
Despite the global pandemic, Vietnam is still in the top 10 countries, in terms of citizenship, with the largest number of international students in the United States, with 32,507 students studying at all education levels in calendar year 2020, according to data from the Student and Exchange Visitor Information System (SEVIS) of the U.S. Department of Homeland Security.

In addition, Vietnam remains the sixth leading country of origin for all international higher education students in the United States, with 21,631 students studying at U.S. institutions of higher education in the academic year 2020-2021. Among community college enrollment, Vietnamese students continue to constitute the second largest group of foreign students, accounting for almost 11 percent of all international enrollments, according to the Institute of International Education’s (IIE) annual Open Doors Report.

Of the 21,631 Vietnamese students enrolled in higher education in the United States, 70.6 percent are undergraduates, 15.6 percent focus on graduate level study, 12.1 percent are enrolled in Optional Practical Training (OPT), and the remaining 1.6 percent are pursuing non-degree programs.

**SUB-SECTORS**

**Four-Year University/Graduate Degree**

The majority of 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 and Management and Physical/Life Sciences. In the academic year 2020-2021, the percentage of Vietnamese students pursuing STEM and business/management majors were 46% and 26.9%, respectively.

**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 to better prepare them for a U.S. college education. It is important to note that Vietnamese parents cite providing a safe and comfortable environment for their children 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.

**OPPORTUNITIES**

Education remains a cornerstone of the United States-Vietnam bilateral relationship. The U.S. Commercial Service stands ready to assist education institutions to learn about market opportunities and challenges and introduce them to pre-qualified potential Vietnamese education consultancies/agencies.

**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

• U.S. Commercial Service - Vietnam: https://trade.gov/vietnam
• U.S. Commercial Service Global Education Team: https://trade.gov/education-industry
• Industry and Analysis, Office of Supply Chain, Professional & Business Services: https://www.trade.gov/professional-and-business-services
• EducationUSA: https://educationusa.state.gov
• Higher Engineering Education Alliances: https://heeap.org
• Viet Abroader: https://vietabroader.org/
• Fulbright Vietnam: https://fulbright.edu.vn

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## 2021 Market Sizes by Country

<table>
<thead>
<tr>
<th>Country</th>
<th># of Students Abroad in the U.S.</th>
<th>% of Undergraduate Enrollment</th>
<th>% of Graduate Enrollment</th>
<th>% of Other: ESL*/OPT*/HE*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>219</td>
<td>46%</td>
<td>37%</td>
<td>17%</td>
</tr>
<tr>
<td>Argentina</td>
<td>2,184</td>
<td>47%</td>
<td>37%</td>
<td>16%</td>
</tr>
<tr>
<td>Australia</td>
<td>3,623</td>
<td>57%</td>
<td>27%</td>
<td>16%</td>
</tr>
<tr>
<td>Austria</td>
<td>655</td>
<td>47%</td>
<td>37%</td>
<td>16%</td>
</tr>
<tr>
<td>Belgium</td>
<td>756</td>
<td>53%</td>
<td>28%</td>
<td>19%</td>
</tr>
<tr>
<td>Belize</td>
<td>352</td>
<td>53%</td>
<td>34%</td>
<td>13%</td>
</tr>
<tr>
<td>Brazil</td>
<td>14,000</td>
<td>52%</td>
<td>30%</td>
<td>18%</td>
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<td>Bulgaria</td>
<td>585</td>
<td>48%</td>
<td>31%</td>
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<td>China</td>
<td>317,299</td>
<td>40%</td>
<td>37%</td>
<td>23%</td>
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<td>Colombia</td>
<td>7,107</td>
<td>37%</td>
<td>40%</td>
<td>23%</td>
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<tr>
<td>Costa Rica</td>
<td>1,134</td>
<td>46%</td>
<td>36%</td>
<td>18%</td>
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<td>Croatia</td>
<td>393</td>
<td>57%</td>
<td>30%</td>
<td>13%</td>
</tr>
<tr>
<td>Denmark</td>
<td>608</td>
<td>60%</td>
<td>26%</td>
<td>14%</td>
</tr>
<tr>
<td>Dominican Republic</td>
<td>1,244</td>
<td>62%</td>
<td>22%</td>
<td>16%</td>
</tr>
<tr>
<td>Egypt</td>
<td>3,672</td>
<td>36%</td>
<td>47%</td>
<td>17%</td>
</tr>
<tr>
<td>El Salvador</td>
<td>1,492</td>
<td>73%</td>
<td>14%</td>
<td>13%</td>
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<tr>
<td>Ethiopia</td>
<td>2,166</td>
<td>63%</td>
<td>22%</td>
<td>15%</td>
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<td>Finland</td>
<td>485</td>
<td>60%</td>
<td>22%</td>
<td>18%</td>
</tr>
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<td>France</td>
<td>5,643</td>
<td>39%</td>
<td>34%</td>
<td>27%</td>
</tr>
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<td>Germany</td>
<td>5,364</td>
<td>45%</td>
<td>38%</td>
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</tr>
<tr>
<td>Ghana</td>
<td>4,229</td>
<td>25%</td>
<td>55%</td>
<td>20%</td>
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<td>Greece</td>
<td>2,256</td>
<td>31%</td>
<td>47%</td>
<td>22%</td>
</tr>
<tr>
<td>Guatemala</td>
<td>1,102</td>
<td>63%</td>
<td>23%</td>
<td>14%</td>
</tr>
<tr>
<td>Honduras</td>
<td>2,021</td>
<td>64%</td>
<td>20%</td>
<td>16%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>5,878</td>
<td>58%</td>
<td>22%</td>
<td>20%</td>
</tr>
<tr>
<td>Hungary</td>
<td>653</td>
<td>50%</td>
<td>30%</td>
<td>20%</td>
</tr>
<tr>
<td>India</td>
<td>167,582</td>
<td>14%</td>
<td>41%</td>
<td>45%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>7,489</td>
<td>62%</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>Japan</td>
<td>11,785</td>
<td>61%</td>
<td>23%</td>
<td>16%</td>
</tr>
<tr>
<td>Jordan</td>
<td>2,338</td>
<td>38%</td>
<td>44%</td>
<td>18%</td>
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<td>Tirana</td>
<td>Edi Jacellari</td>
<td>Commercial Specialist</td>
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<td>Laura Reffatti</td>
<td>Commercial Specialist</td>
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*U.S. Commercial Service* 271
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.